32 SOFT
DATA LOADERS
Productivity Solutions for QAD ERP

1.4.17 Item Site Planning
Data Loader User Guide

1.4.17 Item Site Planning Maintenance Data Loader User Guide

Thank you for your interest in 32 Soft's productivity solutions for QAD. You are on the path to improved data management and productivity.

This User Guide will show you how to set up and use the 1.4.17 Item Site Planning Maintenance Data Loader.

Contents

To browse a complete list of Data Loaders, click here.

1.4.17 Item Site Planning Maintenance Data Loader User Guide

Set Up

1. Open up the Loader and check that correct database is set up. Click on the [SETUP] button to open the window and highlight the correct database. Click on [SELECT] when done.
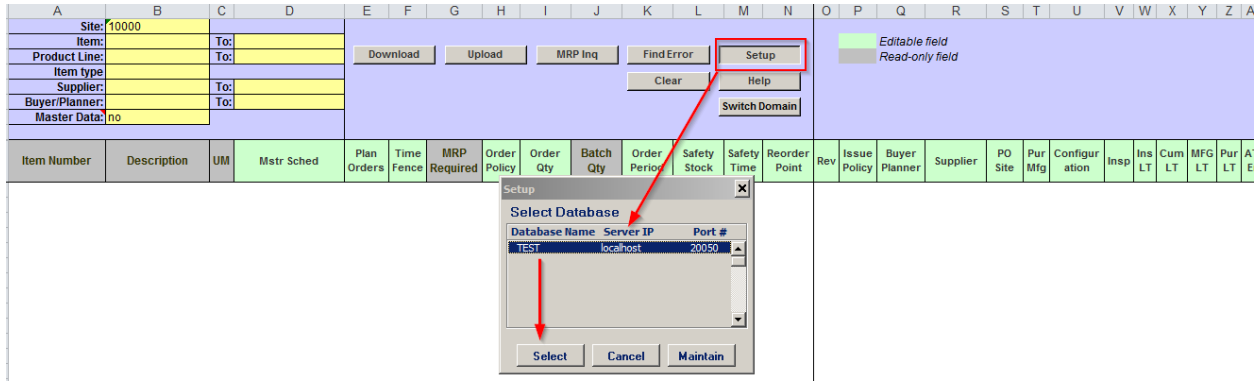

- Pop Up Window will be displayed showing available databases from which to select.
- Highlight desired database and click on the [SELECT] button
- Message will be displayed showing database selected. Click [OK] to continue.
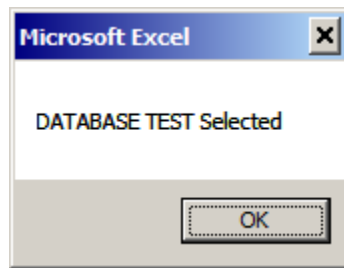
Maintain or Create New Item Site records

1. You can use this Loader to maintain existing Item site records or create new Item site records, by entering in the search criteria in the yellow highlighted fields.
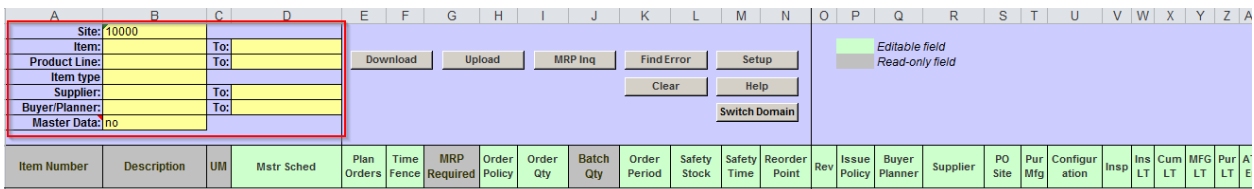
Search parameters are available for the following fields:
- **Site**: enter valid site: please note, this field is also used for Upload
- **Item**: enter range of Items or leave blank for all
- **Product Line**: enter range of Product Lines or leave blank for all
- **Item Type**: enter range of Item Types or leave blank for all

- **Supplier**: enter range of Suppliers or leave blank for all
- **Buyer/Planner**: enter range of Buyer/Planners or leave blank for all
- **Master Data:** enter "no" to download Item site planning data; enter "yes" to download item master planning data

2. Once Search parameters are entered, select the [DOWNLOAD] button.
   - When Action buttons are selected for the first time, a pop-up window will be displayed for user log in. User ID is validated against QAD. Use your QAD user ID and password.

- Enter QAD User ID, Password and Domain
- Select [LOGIN] button to continue.

Please note: if provided credentials are incorrect or the user is not authorized to use transactions in menu 1.4.17 in QAD, the database connection will not be established and the QAD login window will reappear.

- The Data Loader will display data based on the search criteria. A message will indicate whether a download was successful or not:

- Columns highlighted in green are writable.
- Columns highlighted in grey are read-only.

3. Analyze the data and make the changes in the green highlighted columns:

Item Number	Description	UM	Mstr Sched	Plan Orders	Time Fence	MRP Required	Order Policy	Order Qty	Batch Qty	Order Period	Safety Stock	Safety Time	Reorder Point	Rev	Issue Policy	Buyer Planner	Supplier	PO Site	Pur Mfg	Configur ation	Insp	Ins LT	Cum LT	MFG LT	Pur LT	AT Er
02-0010	ERASER REFILL P/ EA	yes		yes	1	yes	POQ	0	1.0	7	0	1	0		yes			10000		no	0	0	0	0	N
10-0010	Test1	EA	no	no	2	no	POQ	10	1.0	7	10	10	10		yes		505	10000 M		no	1	2	3	4	N
10-10000	OASIS(TM) SYSTEM EA	no	no	3	yes	POQ	20	1.0	7	0	0	0		yes			10000 M		no	0	8	1	0	N
10-15000	NOMAD(TM) COOLI EA	yes	yes	0	no	POQ	30	1.0	7	0	0	0	AB	yes			10000 M		no	0	3	1	0	N
2-20001	Sub Asm 1 KB Item EA	no	yes	0	no	POQ	40	1.0	7	0	0	0		yes	DRB		10000 M		no	0	0	0	0	N
20-20000	OASIS(TM) SYSTEM EA	yes	yes	0	no	POQ	0	1.0	7	0	0	0	AB	yes			10000 M		no	0	8	1	0	N
203-0536	Housing, Casting G EA	yes	yes	14	no	POQ	1	1.0	7	0	0	0		yes		00050000	10 P		no	0	0	0	1	N
214T1-E5001	test	EA	yes	yes	0	no	POQ	60	1.0	7	0	0	0		yes			10000 M		no	0	0	0	0	N
22-100	CORD,POWER,UK EA	yes	yes	0	yes	POQ	70	1.0	7	0	0	0	AA	yes	MBH	505	10000 P		no	3	1	0	1	N
22-110	CORD,POWER,EUI EA	yes	yes	0	yes	POQ	80	1.0	1	0	0	0	AA	yes	MBH	50000000	10000 P		no	3	1	0	1	N
3-20102	Sub Asm Compone EA	no	yes	0	no	POQ	90	1.0	7	0	0	0		yes	DRB	00000001	10000 P		no	3	0	0	2	N
30-100	BATTERIES,ALKALI EA	yes	yes	0	no	POQ	100	1.0	7	0	0	0	AA1	yes			10000 P		no	3	7	0	7	N
44-100	OPA-800CF Ultrafa: EA	yes	yes	0	no	POQ	110	1.0	7	0	0	0		yes			10000 M		no	3	11	3	0	N
55-110	EVAPORATOR,SER EA	yes	yes	0	no	POQ	120	1.0	7	0	0	0	AA	yes		5002000	10000 P		no	3	1	0	1	N
66-210	PUMP,AUTO,BATTE EA	yes	yes	0	no	POQ	130	1.0	7	0	0	0	AA	yes		5002000	10000 P		no	3	1	0	1	N
88-100	CASE,AUTO-UNIT EA	yes	yes	0	no	POQ	140	1.0	7	0	0	0	AA	yes			10000 M		no	3	2	1	0	N
88-200	CASE,HOME/INDUS EA	yes	yes	0	no	POQ	150	1.0	7	0	0	0		yes			10000 M		no	3	1	0	1	N
88-300	BOTTLE,PLASTIC,1 EA	no	yes	0	yes	POQ	160	1.0	7	0	0	0	B	yes	DRB		10000 M		no	3	2	1	0	N
88-4000	PLASTIC PELLETS KG	yes	yes	0	yes	POQ	170	10.0	7	1,000	0	0	AA	yes		5004000	10000 P		yes	3	1	1	1	N
88-5000	RESIN BASE	KG	yes	yes	0	yes	POQ	180	1.0	7	0	0	0	AA	yes		6005000	10000 P		no	3	1	1	0	N
88-6000	GREY COLORANT	L	yes	yes	0	yes	POQ	190	1.0	7	0	0	0	AA	yes		5004000	10000 P		no	3	1	0	1	N
90-100	KOOLAIRE(TM) CO EA	yes	yes	0	yes	POQ	200	1,000.0	7	0	0	0		yes			10000 D		no	3	0	1	0	N
90-110	KOOLAIRE(TM) ME EA	yes	yes	0	yes	POQ	210	1,000.0	7	0	0	0		yes			10000 D		no	3	0	1	0	N
99-510	BOX,SHIPPER,LAR EA	no	yes	0	yes	POQ	220	1.0	7	50	100	1,000	AA	no		6002000	10000 P		no	3	1	0	1	N

Site: 10000 — Downloaded Successfully from eB21 SP5 QP

Note: The Site in the selection criteria is also used for the upload. You can download Item site planning data for one site or from the item master, and then change the site in the header and upload for another site.

4. When you are finished entering data, select the [UPLOAD] button and status will be displayed in pop up window with a message.

Site: 10000 — Loaded Successfully to eB21 SP5 QP

Status
Validating data...
Creating Upload file...
Processing Row ... 20
Processing Row ... 30
Loading Item-Site Planing Data...
LOADED SUCCESSFULLY

32Soft Inc.   Close

Note: Item Site record changes have been updated in the Item Site Planning Maintenance screen in QAD (1.4.17)
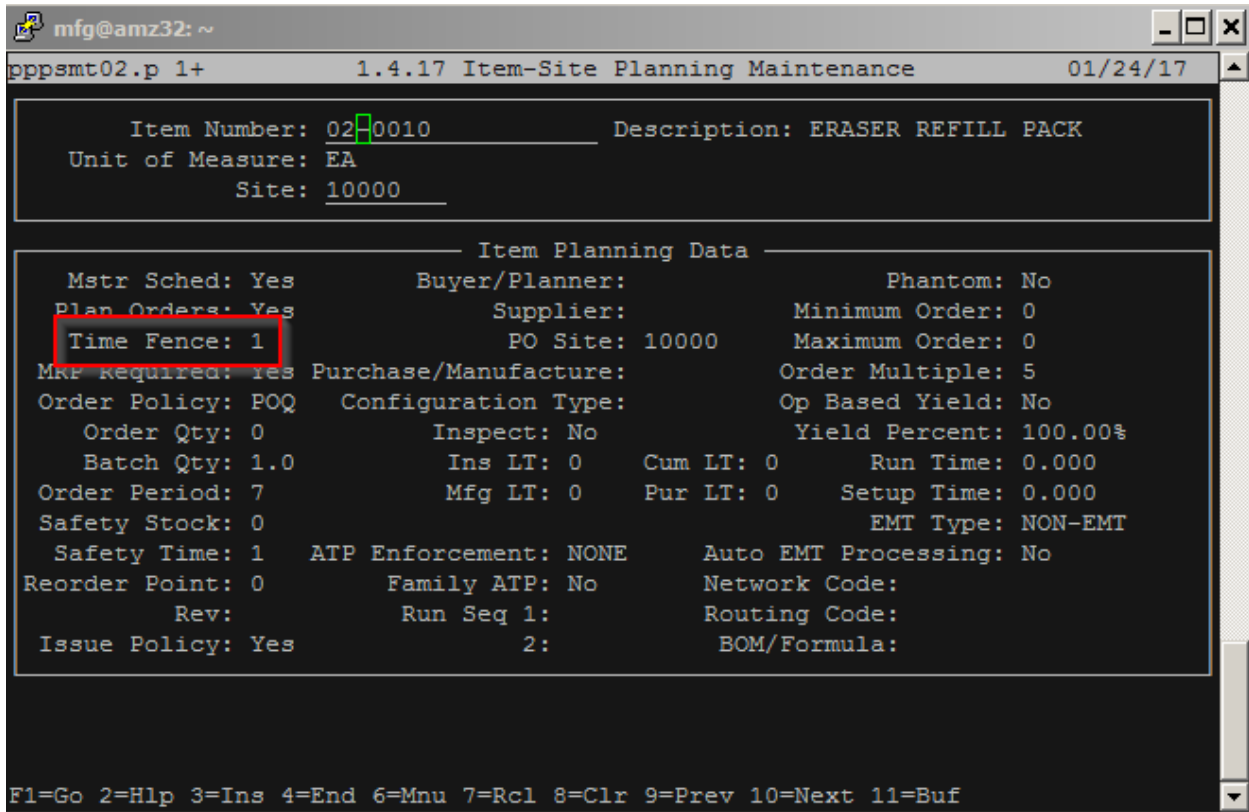
Inquiries

1. To view the MRP Detail for an item/site, select an item and click the [MRP Inq.] button. This will open a window showing the output of the 23.16 MRP Detail Inquiry for the selected item and the site specified in the filters.

Error Checking

When you upload to QAD, a window pops up indicating the status of the upload. If there is an error, it will indicate that and the cell with the error will be highlighted in red. If you mouse over the cell, it will display the error.

- You can use the [Find Error] button to navigate between cells with errors.
- You must correct the error before uploading again. If there is error in one cell, no records are uploaded.

Have Questions? Contact Us.

Now that you know everything is set-up correctly, you are on your way to a more productive QAD experience with Data Loaders! Thank you for your interest.

If you have any questions or need additional help, please do not hesitate to contact us.