

# EXCEPTION OPTIMIZATION

Help, There Are Too Many Exceptions!

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**BLUEPRINT 2019**  
PLANNING FOR A FLEXIBLE FUTURE

# AGENDA



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Why do I get so many exceptions?

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What is “Exception Optimization?”

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How Do I Create Exception Rules?

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# WHAT ARE EXCEPTIONS?



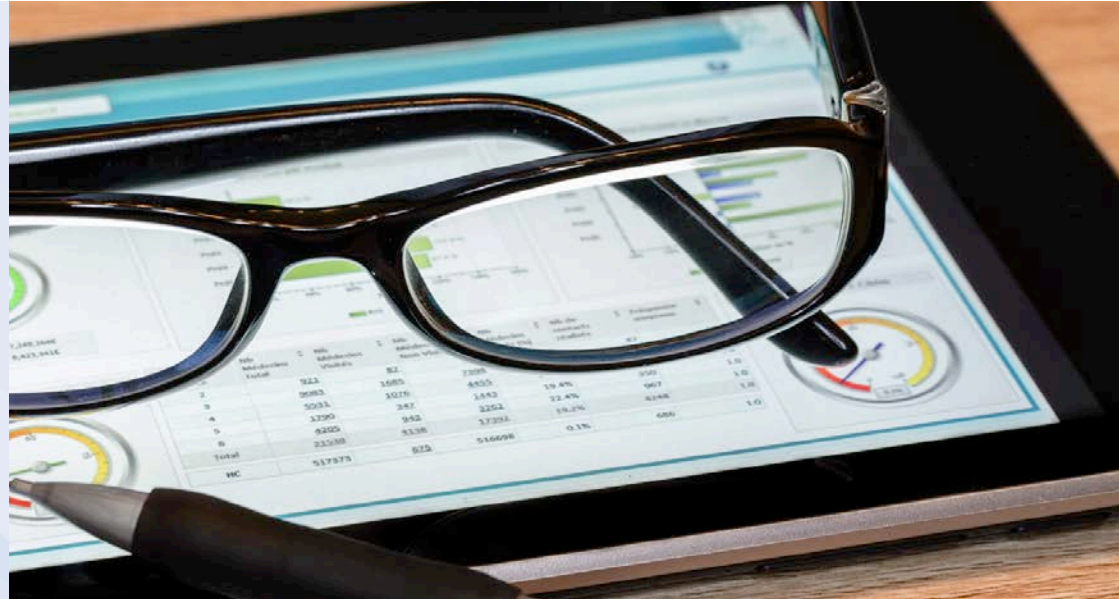
A Demand Exception is notification that a user will receive after the end of each forecasting period indicating that one of their items has performed outside of the parameters set in your global controls

There are SIX types of exceptions...

# TYPES OF EXCEPTIONS

- Demand High
  - Active and Watch items that had unusually high demand in the previous period
- Demand Low
  - Active and Watch items that had unusually low demand in the previous period
- Trending Up
  - Active and Watch items that had demand trending up over the last several periods
- Trending Down
  - Active and Watch items that had demand trending down over the last several periods
- Missed Service
  - Active and Watch items that ran out of stock during the previous week
- Infinity Check
  - Active and Watch items that had a forecast of less than 0.1 each week and experienced demand in the previous period

# WHY DO I GET SO MANY EXCEPTIONS?



# INITIAL EXCEPTION PARAMETERS

Exception Parameters

<input type="text" value="5.00"/>	Demand High Limit	<input type="text" value="3.00"/>	Demand Low Limit
<input type="text" value="53.00"/>	Trending Up Limit	<input type="text" value="53.00"/>	Trending Down Limit

Any Active or Watch item the crosses these thresholds is going to appear as an exception

# WHAT IS EXCEPTION OPTIMIZATION?





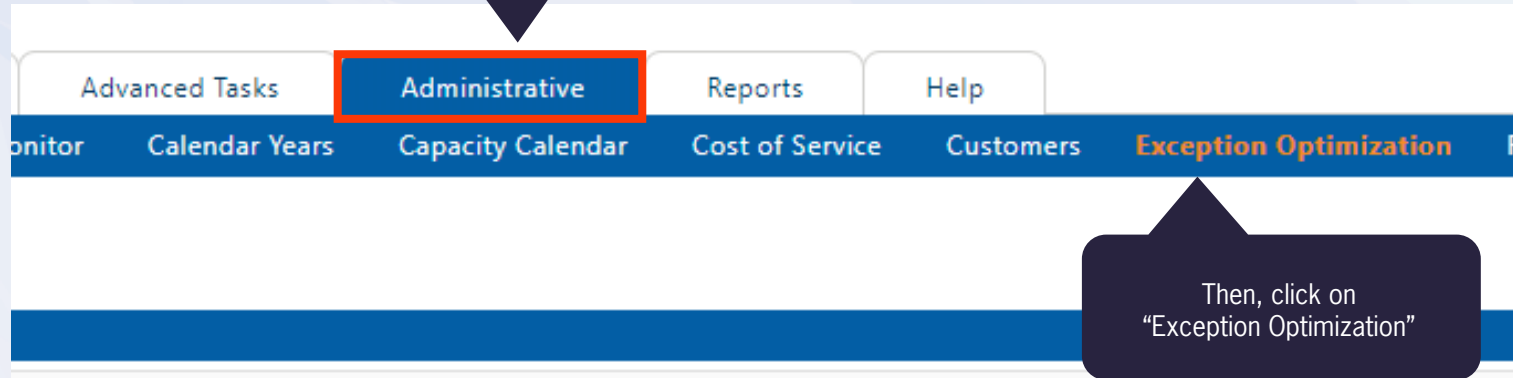


# HOW DO I CREATE AN EXCEPTION RULE?



# GETTING TO THE OPTIMIZATION PAGE

First, highlight the  
"Administrative" tab



Then, click on  
"Exception Optimization"

# THE EXCEPTION OPTIMIZATION PAGE

The screenshot shows the Blue Ridge Exception Optimization interface. At the top, there's a navigation bar with tabs for Dashboard, Daily Tasks, Advanced Tasks, Administrative, Reports, and Help. Below this is a sub-navigation bar with various options like Activity Code Settings, Activity Monitor, and Exception Optimization. The main content area is divided into sections: Exception Parameters, Exception Rules Editor, and a detailed rule editor at the bottom.

**Exception Parameters**

4.00 Demand High Limit 4.00 Demand Low Limit  
50.00 Trending Up Limit 50.00 Trending Down Limit

**Exception Rules Editor**

ID	Description	User Name	Override exists
5	4WK FCST<2, cost=<\$1.50 VC =A,B BM=>12		No
6	WK FCST =<1 BM=>6 Cost <\$1.01		No
7	4WK FCST<6 Active BM=>24 COST<45		No
8	WK FCST<7 BM=>36		No
9	STD % < 20%		No
10	Catch Weight Flag is True		No
11	Item LT < 3 days		No

**Exception Rules Editor (Detailed View)**

ID: 5 Description: 4WK FCST<2, cost=<\$1.50 V

- Item: 4 Weekly Forecast Is Less Than 2
- Item: Velocity Code Is Not A Velocity
- Item: Velocity Code Is Not B Velocity
- Item: Selling Unit Cost Equals 0
- Item: Buying Multiple (Units) Is Equal To Or ... 12

First level Exception Parameters moved to this screen from Global Controls

Create, Edit, Copy or Delete Exception Rules. The amount of rules are unlimited

Exception Rules exclude exceptions that meet the stated criteria

# EXCEPTION PARAMETERS







Exception Parameters

<input type="text" value="5.00"/>	Demand High Limit	<input type="text" value="3.00"/>	Demand Low Limit
<input type="text" value="53.00"/>	Trending Up Limit	<input type="text" value="53.00"/>	Trending Down Limit

Any Active or Watch item the crosses these thresholds is going to appear as an exception

# EXCEPTION RULE EDITOR

Exception Rules Editor Add Exception Rule

	ID	Description	Created	User Name	Override exists
  	2	forecast less than .5 per week for Trend Down	12/20/2017		No
  	3	forecast less than .5 for Trend Up	1/15/2018	Consulting, BR	No

1 - 2 of 2 items

- All exception rules will be shown in this window
- Users have the ability to Edit, Copy, and Delete rules from this section

# CREATING AN EXCEPTION

The screenshot shows the 'Exception Rules Editor' interface. At the top right, a blue button labeled 'Add Exception Rule' is highlighted with a callout box that says 'Click on "Add Exception Rule" to open the editor window'. Below this is a table with columns for 'ID', 'Description', 'Created', 'Used', and 'Rule exists'. The table is currently empty, with the text 'No items to display' at the bottom right. Below the table, there are input fields for 'ID:' and 'Description:', followed by 'Cancel', 'Save Exception Rule', and 'Add Override' buttons. A callout box points to a funnel icon with a plus sign, stating 'Click on "Add filter field" to begin selecting criteria'.

# SELECTING A FILTER PARAMETER

The screenshot shows a software interface for selecting a filter parameter. At the top left, there are three funnel icons with plus and minus signs. Below them is a search bar containing 'Item: Weekly Forecast' with a red 'X' on the left and a dropdown arrow on the right. The dropdown menu is open, showing a list of filter parameters:

- Item: User Defined3
- Item: User Defined4
- Item: Velocity Code
- Item: Warehouse Multiple
- Item: Warehouse Round (%)
- Item: Weekly Forecast** (highlighted in blue)
- Item: Yearly Forecast
- Supplier Lead Time Day of Week: Supplier
- Supplier: % Lead Time Deviation Value

To the right of the search bar is a dropdown menu set to 'Equals' and a text input field containing '0'. A dark blue callout box with white text points to the dropdown arrow of the search bar, containing the text: 'Use the drop down menu to select the parameter to filter'.



# SELECTING AN OPERATOR AND VALUE



The screenshot displays a filter configuration interface. At the top left, there are three funnel icons with plus and minus signs. Below them is a filter item labeled "Item: Weekly Forecast" with a red 'X' icon on the left and a dropdown arrow on the right. To the right of the item is a dropdown menu for operators, currently showing "Equals". Below the operator dropdown is a text input field containing the number "0", with up and down arrow icons on its right side. Two dark blue callout boxes provide instructions: one points to the operator dropdown menu, and the other points to the value input field.


Use the drop down menu to select which operator to apply

Use this field to enter a value for the filter

# SAVING YOUR RULE

Don't forget to name your rule

ID:  Description :



Click here to save your rule

# CREATING ADDITIONAL RULES

**Exception Parameters**

5.00 Demand High Limit 3.00 Demand Low Limit

53.00 Trending Up Limit 53.00 Trending Down Limit

**Exception Rules Editor**

[Add Exception Rule](#)

ID	Description	Created	User Name	Override exists
1	Weekly FCast Less Than 3	4/5/2019	Ridge, Blue	No

1 - 1 of 1 items

Click here to create additional rule

Your newly created rule will appear here

# FILTERING FOR SPECIFIC SUPPLIERS

Click on "Add filter field" to begin selecting criteria

Supplier: Name | Equals

- Supplier: Lead Time Value From
- Supplier: Line Cost
- Supplier: Line Cost From Type
- Supplier: Location
- Supplier: Name**
- Supplier: New Item Duration (In Weeks)
- Supplier: New Item Duration From Type
- Supplier: Order Comments
- Supplier: Order Cost

Use the drop down menu to select the parameter to filter


The screenshot shows a software interface for filtering. At the top left, there are three filter icons: a blue funnel with a plus sign, a blue funnel with a plus sign, and a blue funnel with a minus sign. A callout bubble points to the first icon with the text "Click on 'Add filter field' to begin selecting criteria". Below the icons is a filter configuration area. It features a search bar containing "Supplier: Name" with a red 'X' icon to its left. To the right of the search bar is a dropdown menu currently set to "Equals" and an empty text input field. A callout bubble points to the dropdown menu with the text "Use the drop down menu to select the parameter to filter". Below the search bar is a list of filterable fields: "Supplier: Lead Time Value From", "Supplier: Line Cost", "Supplier: Line Cost From Type", "Supplier: Location", "Supplier: Name" (highlighted in blue), "Supplier: New Item Duration (In Weeks)", "Supplier: New Item Duration From Type", "Supplier: Order Comments", and "Supplier: Order Cost".

# FILTERING FOR SPECIFIC SUPPLIERS

Don't forget to name your rule!

Save your rule

ID:  Description :



Use this drop down menu to select which operator to apply

Enter your value here


Exception Parameters

5.00 Demand High Limit 3.00 Demand Low Limit  
53.00 Trending Up Limit 53.00 Trending Down Limit

Click here to create a new rule

Exception Rules Editor

Add Exception Rule

	ID	Description	Created	User Name	Override exists
  	1	Weekly FCast Less Than 3	4/5/2019	Ridge, Blue	No
  	2	Food And Stuff	4/5/2019	Ridge, Blue	No

1 - 2 of 2 items

# CREATING A COMPOUND RULE

Add your filter rule

name

Supplier: Name

Equals

You can type the parameter name here instead of selecting from the list

# ADDING A SECOND FILTER FIELD

After your first filter is done click here to add a second filter

Clicking here will toggle between "AND" and "OR"

The screenshot shows a filter configuration interface. At the top left, there are three funnel icons: the first two have a green plus sign, and the third has a red minus sign. Below these are two filter rows. The first row has a red 'X' icon, a text input field containing 'Supplier: Name', a dropdown arrow, a dropdown menu showing 'Equals', and a text input field containing 'Dunder Mifflin'. The second row has a red 'X' icon, a text input field containing 'Item: Velocity Code', a dropdown arrow, a dropdown menu showing 'Is', and a dropdown menu showing 'C Velocity Code'. To the right of the second filter row is a button labeled 'AND'.



# ADDING ADDITIONAL VALUES TO THE SAME FILTER

First, click the “Add Filter Group” icon to add another value

The screenshot shows a filter configuration interface with the following elements:

- At the top left, there are three funnel icons: the first has a green plus sign, the second has a green plus sign, and the third has a red minus sign.
- Below the icons, there are two filter rows. The first row is for "Supplier: Name" with a value of "Dunder Mifflin" and an "AND" button to its right. The second row is for "Item: Velocity Code" with a value of "C Velocity Code" and a dropdown arrow to its right.
- Below these rows, there is a section with an "OR" button.
- Below the "OR" button, there is a new filter row with a dropdown arrow, the text "Equals", another dropdown arrow, and an empty text input field.

Callouts point to the following elements:

- A callout points to the first green plus icon.
- A callout points to the plus sign on the "Supplier: Name" filter.
- A callout points to the plus sign on the "Item: Velocity Code" filter.
- A callout points to the "OR" button.
- A callout points to the empty text input field in the new filter row.

Then, click here to add the second value

Next, click here to toggle “OR” or “AND”


This can be a different value for the same parameter or a different parameter completely

# SAVE YOUR RULE

Don't forget to name your rule!

Save your rule

ID:  Description :












Supplier: Name





Item: Velocity Code

Item: Velocity Code

# YOUR NEW EXCEPTION RULES

Exception Rules Editor Add Exception Rule

	ID	Description	Created	User Name	Override exists	
  	1	Weekly Fcast Less Than 3	4/5/2019	Ridge, Blue	No	▲
  	2	Food And Stuff	4/5/2019	Ridge, Blue	No	
  	4	Dwight's Exception	4/5/2019	Ridge, Blue	No	▼

  **1**   1 - 3 of 3 items

# WHAT IS ORDER COMPARISON?



BLUE RIDGE Dashboard Daily Tasks Advanced Tasks **Administrative** Reports Help Users: Implementation - System Name: Training - System Date: 4/24/2019 - 1:53:53 PM

[Activity Code Settings](#) [Activity Monitor](#) [Calendar Years](#) [Capacity Calendar](#) [Cost of Service](#) [Customers](#) **Exception Optimization** [Forecast Audit List](#) [Global Controls](#) [Interface Settings](#) [Exception Optimization](#)

[Order List](#) [Order Summary](#) [Order Item Detail](#) [Exception Optimization](#) Update

**Exception Parameters**

Demand High Limit: 5.00 Demand Low Limit: 3.00  
 Trending Up Limit: 53.00 Trending Down Limit: 53.00

**Exception** Add Exception Rule

	Created	User Name	Override exists
<input type="checkbox"/>	5/5/2019	Ridge, Blue	No
<input type="checkbox"/>	5/5/2019	Ridge, Blue	No
<input type="checkbox"/>	4/5/2019	Ridge, Blue	No

1 - 3 of 3 items

**Order Comparison**

Order Up to level change in: 10.00 Percentage:  OR  AND  
 Order Up to level change in: 500.00 Currency:  OR  AND  
 Order Up to level change in: Buying Multiple:  OR  AND

Order Comparison...Eliminates the time wasters

# SELECTING YOUR RULES

**Order Comparison**

OR AND

Order Up to level change in:  Percentage:

Order Up to level change in:  Currency:

Order Up to level change in:  Buying Multiple:

# YOUR ORDER UP TO LEVEL

Units	Cal Days	Sell Days	
17.0	151.7	109.7	<b>SOQ</b>
0.0	0.0	0.0	Capacity
0.0	0.0	0.0	Maximum Qty (0.0)
0.0	0.0	0.0	Precision
0.0	0.0	0.0	Warehouse Multiple (0.0)
0.9	17.8	13.8	Buying Multiple (1.0)
0.0	0.0	0.0	Minimum Qty (1.0)
9.1	21.4	15.4	Days Added (21)
<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>Special Orders</b>
0.0	0.0	0.0	Event (0.0)
0.0	0.0	0.0	Fwd Buy (0.0)
<b>7.0</b>	<b>112.5</b>	<b>80.5</b>	<b>Need</b>
<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>Balance</b>
0.0	0.0	0.0	On Hand
0.0	0.0	0.0	On Order
0.0	0.0	0.0	Backorder
0.0	0.0	0.0	Reserved
0.0	0.0	0.0	Held Qty (0.0)
<b>7.0</b>	<b>341.8</b>	<b>243.8</b>	<b>Order Up To Level</b>
0.0	0.0	0.0	Shelf Life (0.0)
0.1	16.0	12.0	Effective Order Cycle (0.0)
<b>7.4</b>	<b>332.8</b>	<b>236.8</b>	<b>Order Trigger Point</b>
0.0	7.0	5.0	Supplier Order Cycle
<b>7.4</b>	<b>325.8</b>	<b>231.8</b>	<b>Low Stock Point</b>
6.4	90.0	64.0	Lead Time
0.2	55.0	39.0	Safety Stock
1.0	235.8	167.8	Safety Stock Minimum

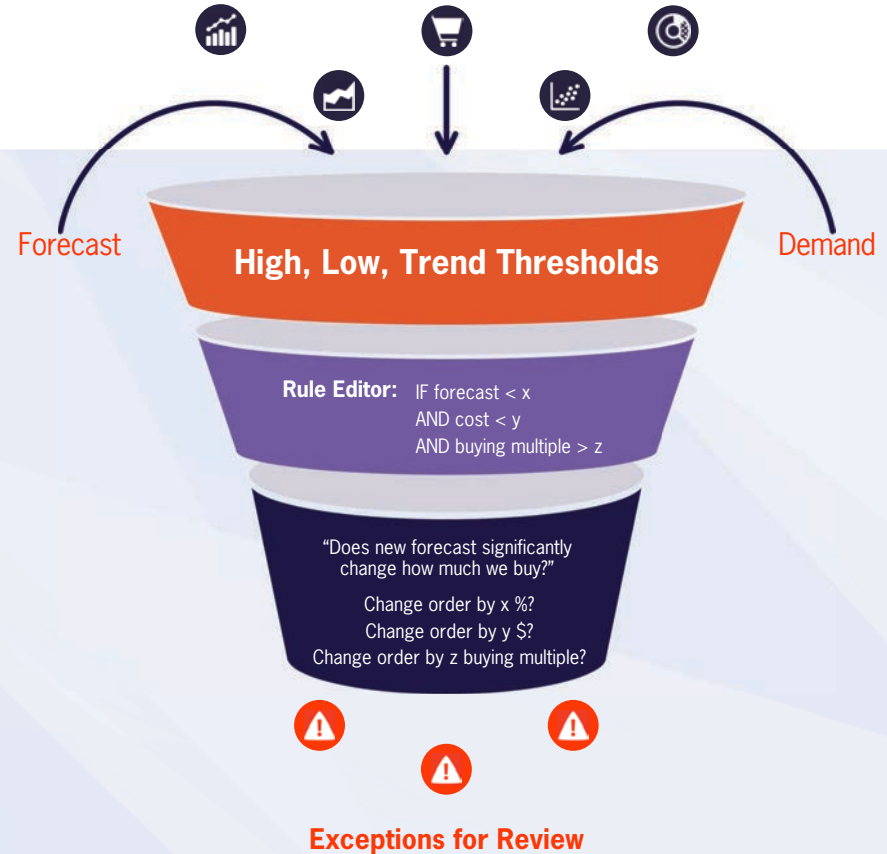
# WON'T I MISS SOMETHING?





# EXCEPTION OPTIMIZATION

- Increased efficiency
- Increased productivity
- Increased profitability



**ANY QUESTIONS?**