



V.5 Product Brochure

Experience the value of inventory optimization



Automated Inventory Forecasting, Planning and Optimization

VALOGIX® Inventory Planner Standard Edition v.5 is built for companies that need a powerful planning solution to solve their complex inventory requirements. Designed to improve inventory planning and employee productivity, the VALOGIX Inventory Planner advanced technology automates the entire planning process, giving employees time to concentrate on activities that help improve the business like satisfying customers and generating more positive cash flow.

Value You Gain

Valogix products provide dramatic results that help improve positive cash flow.

Savings

20% - 40%
Inventory
Reduction

15% - 30%
Reduction
in Stock-outs

6% - 15%
Reduction in
Expedited Shipments

Increases

15% - 25%
Increase in Sales &
Revenues

5% - 12%
Productivity
Gains

Valogix solutions forecast demand, create a more balanced optimized inventory, and generate new and transfer orders automatically. And there is the added benefit of improving positive cash flow quickly, and with less time and effort.

Predictive Demand and Replenishment Planning

- Enhanced algorithms for highly seasonal and slow-moving items
- Demand change tracking - alerts of changes in an item's demand
- New item proxy history - uses an existing item's history to set a forecast
- Automatic replenishment plan for both new orders and stock transfers

Expanded Item Management

- Complete item details on one easy to read screen includes key Attributes
- Complete inventory visibility at all locations, view up to 52 weeks of history
- Dynamically track Excess and Obsolete inventory
- Easily view and edit history and forecast for any item, at any location

VALOGIX® ADAPT Technology (Analytical - Dynamic - Adaptive - Predictive)

- Multiple forecasting models handle slow, seasonal and fast-moving items
- Optimization reduces costs, improves turns, and increases service
- Replenishment planning is optimized for better asset and spend control

According to Valogix Customer - Legend Valve

“In just three months, we reduced our inventory levels by \$300,000 and we expect to improve our inventory turns by 30% within the first year of using VALOGIX MultiLINK Inventory Planner.”

Walter Jann, EVP Legend Valve



System Alerts

SYSTEM STATUS

Name	Last Run Date	Status	Name	Last Run Date	Status
DCN	1/1/05 0:00 AM		Planning	4/6/09 10:38 AM	Successful
Item Master Balance	1/1/05 0:00 AM	Imported Successfully	Month-End	4/6/09 10:19 AM	Successful
Item Master	1/1/05 0:00 AM	Imported Successfully	Forecast	4/6/09 10:40 AM	Successful
Item Master Detail	1/1/05 0:00 AM	Imported Successfully	Inventory Aging	1/1/05 0:00 AM	
Item Number Master	1/1/05 0:00 AM	Imported Successfully	Year-End	4/6/09 10:19 AM	Successful
Location Master	1/1/05 0:00 AM	Imported Successfully	Substitutes		
Month-End History	1/1/05 0:00 AM	WARNING - MYPERRONE			

SYSTEM ALERTS

Stock-Out

D	Date	Item Number	Description	Code	SQ	OH	On Order Total	On Order LT
<input type="checkbox"/>	04/06/2009	#101	SEMI-PNEUMATIC WHEEL 450 #	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	00031	PROBLEM SOLVER ROD	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	00101	4" X 5" STATIONARY HELMET	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	00300	HD CHIPPING HAMMER	E	2	0	0	NA
<input type="checkbox"/>	04/06/2009	00700	1/4" CHAIN BINDER	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	0140323	3/16 PROOF COIL CHAIN	E	209	0	0	NA
<input type="checkbox"/>	04/06/2009	016022865	16-390 DH SNOW SHOVEL	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	016121287	5-TINE MANURE FORK	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	016121303	18-256 6-TINE MANURE FORK	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	02407	25" EXT CORD	E	1	0	0	NA
<input type="checkbox"/>	04/06/2009	02409	100" EXT CORD	E	1	0	0	NA

Records: 11 of 11 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | of 8998

Select All Clear All Delete Alerts Sorted By ITEM NUMBER Ascending

Alerts are your watchdog. They evaluate the data and business parameters running the system and if VALOGIX Inventory Planner detects a potential problem, an alert is issued to the user. Alerts allow you to concentrate on those issues that may cause you to miss goals, objectives or customer orders.

Automated Forecasting

Item Detail

Item # R46020 Description M13 (#4) GRADE 60 20' REBAR

Forecast Type: S Forecast (12 mo): 104181 Lead Time: 60 D Code: E Returns Qty: 0

Planning Code: Forecast Month: March Order Freq: 30 SL %: 95 Total Network: -26137

On Hand: 9599 On Order: 3234 Back Order: 0 Allocated: 0 SQ: 35448 Net: -22615

Year	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
2006	4104	6571	7505	9756	12444	9251	6092	14560	9628	6947	7065	5712	99635
2007	3373	2766	6836	12347	13153	7411	11190	12730	9906	8746	4549	4737	97744
2008	1291	5397	6313	11377	21697	24093	17388	13830	7101	6991	5670	3650	124798
2009	959	3925	3717	0	0	0	0	0	0	0	0	0	8601

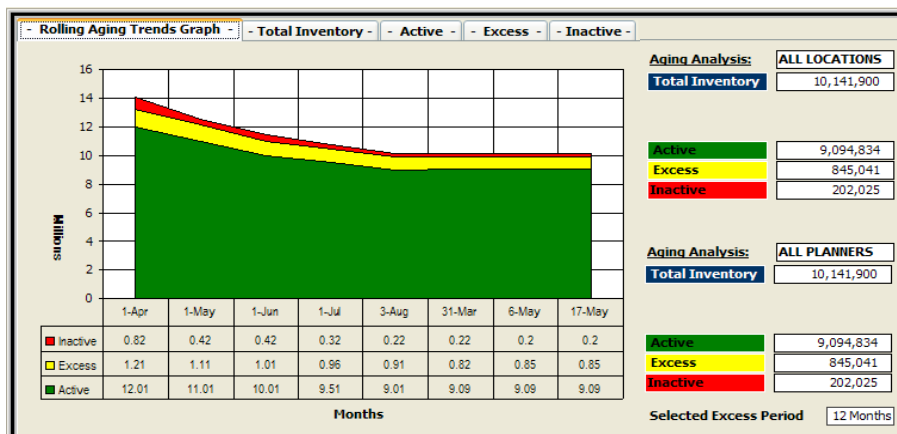
Sales Forecast

Year	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total
2009	0	4760	6726	10902	15400	13270	11289	13389	8672	7385	5627	4590	102010
2010	2375	4556	0	0	0	0	0	0	0	0	0	0	6931

Forecast Edit Save Reset HISTORY Network Detail

Valogix employs sophisticated forecasting algorithms that automatically identify seasonal, random-demand, slow-moving, trend, and normal patterns. You can easily access an item's history and forecast for review. It's simple to make a manual change to the forecast by changing the number in any month. The system will automatically re-plan for the change you made & retain the original value for future use as may be needed.

Forward Inventory Aging



Inventory Aging Summary provides you with fast and reliable information on the status of your inventory by displaying Active, Excess, and Obsolete inventory positions on an easy-to-read graph. The goal is to reduce Excess and Obsolete while improving the Active inventory mix to meet customer orders. Cash flow projections help you to understand your investment decisions.

Automated Replenishment

VALOGIX Inventory Planner optimizes and recommends stock levels for all items. These levels can be manually edited or adjusted for special conditions. Once the stocking level is set, a replenishment requisition can be sent directly to the procurement system, purchasing agent or transaction system. This automated replenishment planning eliminates guess work and manual effort, saving valuable time.

Replenishment Order - Review, Approve, Submit																			
Status		Replenishments				Item Detail				Inventory				Aging					
Total:		Items	10,689	Qty	547,325	Cost	8,904,766				Cost	0							
Filtered:		Items	0	Qty	0	Cost	0				Cost	8,904,766							
Approved:		Items	0	Qty	0	Cost	0				Cost	0							
H/S	Loc	Item Cls	Vendor	Item Number	Description	A	Netwk Avail	Req'd Qty	Trfr Qty	New Buy	Apprv Qty	On-Hand	On-Order	SK-Qty	Netwk OH				
H	25	HDW	000495	2101	SEMI-PNEUMATIC WHEEL #50		0	1	0	1	1	0	0	1	2				
H	9	HWR	00031	00031	PROBLEM SOLVER ROD		3	1	0	1	1	0	0	1	5				
H	9	HDE	00101	00101	4" X 5" STATIONARY HELMET		(1)	1	0	1	1	0	0	1	0				
H	9	HDE	00300	00300	HD CHIPPING HAMMER		(2)	2	0	2	2	0	0	2	0				
H	13	HCN	00700	00700	1/4" CHAIN BINDER		(1)	1	0	1	1	0	0	1	0				
H	21	HCN	751472	0140323	3/16 PROOF COIL CHAIN		(209)	250	0	250	250	0	0	209	0				
H	11	HFO	016022865	016022865	16-390 DH SNOW SHOVEL		(1)	1	0	1	1	0	0	1	0				
H	11	HFO	016121287	016121287	6-TINE MANURE FORK		(1)	1	0	1	1	0	0	1	0				
H	11	HFO	016121303	016121303	18-256 6-TINE MANURE FORK		(1)	1	0	1	1	0	0	1	0				
H	9	HEC	1019170	02407	25' EXT CORD		23	10	0	10	10	2	0	6	32				
H	11	HEC	02407	02407	25' EXT CORD		23	1	1	0	1	0	0	1	32				
H	25	HEC	1019170	02409	100' EXT CORD		(1)	1	0	1	1	0	0	1	0				
H	10	HTP	025800	025800	APSI SPRING HANGER KIT		0	1	0	1	1	0	0	1	2				
H	11	HTP	026916122	026916122	51612 1-1/4" EMT 2 HOLE STRAP		(3)	3	0	3	3	2	0	5	2				
H	10	HTP	1152205	027200	APTS TANDEM HANGER KIT		1	1	0	1	1	0	0	1	3				
H	9	HWR	1111797	02731	CAST IRON ROD		(2)	2	0	2	2	0	0	2	0				
H	11	HFO	075105	028805059	3" WHITE BRISTLE CHP BRUSH		(1)	1	0	1	1	0	0	1	0				
H	11	HFO	034941906	034941906	24" SNOW SHOVEL		(1)	1	0	1	1	0	0	1	0				
H	12	HFN	1020701	04022	RED OXIDE PRIMER (GAL)		(1)	1	0	1	1	0	0	1	0				
H	36	HTP	796633	046400	2000# TORFLEX AXEL #9 IDLER		1	3	0	3	3	0	0	3	5				
H	6	HTP	046410	046410	2000# TORFLEX AXEL W/VEZ LUBE		(1)	1	0	1	1	0	0	1	0				
H	6	HTP	046600	046600	2000# TORFLEX AXEL W/BRAKE		12	1	0	1	1	0	0	1	13				
H	11	HFO	075105	047523030	1/2" STEEL SHAFT COLLAR		(1)	1	0	1	1	0	0	1	0				
H	11	HFO	05113553	05113553		(1)	1	0	1	1	0	0	1	0					

Inventory Optimization

Having a good inventory mix and capital investment maximizes the ability to meet future customer demand. One of the key Valogix features is the automated inventory optimization. The system balances the inventory investment with your goals and objectives. The program pinpoints inconsistencies and exceptions to the business requirements in need of attention, allowing corrective action to be taken to meet needs while minimizing costs.

Inventory Investment Summary															
Status		Replenishments				Item Detail				Inventory				Aging	
Inventory Code		On-Hand + On Order		Ideal Investment		Target Srvlvl		Summary:							
Total Value		27,807,676		19,180,490		98%		ALL LOCATIONS							
Essential Items Value		27,807,676		19,180,490		98%		ALL LOCATIONS							
Non-Essential Items Value		0		0		0%		ALL LOCATIONS							
All Items Essential Items Non-Essential Items															
Item	Primary Cls	Supplier	Description	Loc	Item Number	H/S	SK Qty	OH	OO	Pln Cd	Buyer	Srv Lvl	Unit Cost	Investment Value	Ideal Investment
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	21	F121221	S	0	0	0	0	rn	1441	75	35.28	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	21	F121223	S	0	0	0	0	rn	0	75	73.06	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	39	F121223	S	0	0	0	0	rn	0	75	42.06	0.00	0.00
ABW	1027710	12 1/2 GA BARBLESS WIRE CQ	21	F1212BC	S	0	31	0	0	rn	1441	65	41.60	1,289.60	0.00
ABW	1027710	12 1/2 GA BARBLESS WIRE CQ	34	F1212BC	S	0	0	0	0	rn	0	75	0.00	0.00	0.00
ABW	1027710	12 1/2 GA BARBLESS WIRE CQ	39	F1212BC	S	0	0	0	0	rn	133	75	56.89	0.00	N/A
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	8	F121221	S	0	0	0	0	rn	109	75	26.25	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	9	F121221	S	0	0	0	0	N	0	75	16.00	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	6	F121221	S	0	0	0	0	rn	0	75	28.60	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	13	F121221	S	0	0	0	0	rn	0	75	26.98	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	14	F121221	S	0	0	0	0	rn	0	75	27.33	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	15	F121221	S	0	8	0	0	rn	0	75	58.97	471.76	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-1	25	F121221	S	0	0	0	0	N	133	75	30.00	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	7	F121223	S	0	0	0	0	rn	0	75	46.63	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	8	F121223	S	0	0	0	0	rn	0	75	32.30	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	9	F121223	S	45	37	0	0	rn	0	90	63.72	2,357.71	2,867.49
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	10	F121223	S	0	0	0	0	rn	0	75	31.65	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	32	F121223	S	0	0	0	0	rn	0	75	29.40	0.00	0.00
ABW	1027710	12 1/2 GA 2 PT BARBED WIRE C-3	36	F121223	S	0	0	0	0	rn	0	90	48.80	0.00	0.00

Valogix Compliments Your Business Management Software

Valogix solutions electronically import data from the existing business software. The VALOGIX[®] ADAPT planning engine automatically analyzes the data, then calculates a forecast, optimal stocking quantity and replenishment plan as needed for all items. It determines how much to stock and when, and how much to order and transfer. The data exchange is automated through interfaces designed by Valogix.

VALOGIX® INVENTORY PLANNER V.5

Product Features

History

- ◆ Roll-up Network Hierarchy History to higher levels (as required)
- ◆ User ability to Modify History (Archives actual)
- ◆ Monthly History - 3 previous years plus current year
- ◆ Roll-up Customer History to Network Distribution Warehouse
- ◆ Proxy History at the item level
- ◆ Weekly history displayed for up to 52 weeks

Forecasting

- ◆ Multiple forecast algorithms including proprietary seasonality & trend models
- ◆ System automatically selects best forecast algorithm
- ◆ Edit Forecast
- ◆ Proxy Item Forecasting
- ◆ Control seasonal metrics to fine tune seasonal forecasting

Planning

- ◆ Automatic calculation of optimal Stocking Quantity (Min)
- ◆ Plan based on optimizing service level
- ◆ Automatic calculation of shortage report for replenishment and/or transfers
- ◆ Supports Vendor Rules - lot size, min qty order by item
- ◆ Plan substitute and supercede items
- ◆ Reverse Logistics
- ◆ User ability to change quantity ordered or transferred
- ◆ Automatic calculation of optimal Valogix Order Quantity (Max)
- ◆ User ability to add items to the plan
- ◆ Ability to enter transfers to and from different locations
- ◆ Ability to consider entire network on-hand inventory before buying
- ◆ Time Phased Planning
- ◆ Ability to plan item groups
- ◆ Vendor Planning - plan to vendor \$ order min

Alerts

- ◆ Stock-Out
- ◆ New Item
- ◆ Ability to drill into item detail for any alert
- ◆ Demand Change - period to period

Inventory Analysis

- ◆ Ideal vs. actual inventory investment analysis
- ◆ Aging Analysis by active, excess and obsolete items

Edit Simulations

- ◆ Edit Forecast
- ◆ Modify History
- ◆ Edit Lead Time at item, group or global level
- ◆ Edit Order Frequency at item, group or global level
- ◆ Item/Vendor Lead Time
- ◆ Edit and Control Parameter changes simulate different planning scenarios

Reports

- ◆ Approved Orders for Purchase
- ◆ Approved Orders for Internal Transfer
- ◆ History and Forecast
- ◆ Recommended Stocking Quantity
- ◆ Export to excel all tables (unfiltered data)
- ◆ Approved Orders for Internal Transfer with Bin location
- ◆ Export to excel all tables based on filtered log-in

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VALOGIX® Inventory Planner



Developed in USA