Monthly Planning

Module Guide: Monthly Production Planning

Module Location

Production > Production Planning > Monthly Planning

Module Objective

The **Monthly Planning** module serves as the center for creating and managing the **Monthly Production Plan**. This is a high-level plan that sets the production targets for the month ahead. This plan becomes the basis for more detailed planning, such as the creation of the weekly Master Production Schedule and medium-term material requirements calculation.

1. Main View (Monthly Planning List)

The main page of this module displays a list of all monthly planning documents that have been uploaded into the system.

View Explanation

- **View**: This page is a history of all existing monthly production plans. You can see the **Document Number**, the planning **Period**, and its **Status** (whether it has been approved or not).
- **Action Buttons**:
  - **[New]**: The primary button to start the process of creating a new monthly plan.

2. Steps to Create a Monthly Plan (via Upload)

The main way to create a monthly plan is by uploading a formatted Excel file.

Step 1: Open the Upload Page

From the Main View, click the **[New]** button to open the **Upload Monthly Plan** page.

Step 2: Download and Fill in the Template

1. On the upload page, click the **Download Excel Template** link to download the standard template.

2. Open the Excel file and fill it in with your monthly production targets, which usually include columns such as **Product Code** and **Target Quantity**.

Step 3: Upload the Plan

1. Return to the upload page, click the **[Choose File]** button, and select the Excel file you have filled in.

2. Click the **[Import]** button to upload the plan into the system.

Workflow & Integrated Business Process

- The Monthly Plan uploaded here is the strategic plan that becomes the main reference for the PPIC team.

- This plan will be broken down into a more detailed plan in the **Production Schedule** module (e.g., into a weekly schedule).

- This plan is also an important input for the **MRP (Material Requirements Planning)** process to predict raw material needs for the month ahead.

Tips & Important Notes

- The upload from Excel feature greatly speeds up the monthly planning process.

- This is a crucial strategic module and is the first step of the entire production planning cycle. This module is typically used by the **PPIC Manager**.

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