[Purpose: 1](#_Toc488234489)

[Related Documents: 1](#_Toc488234490)

[Responsible: 1](#_Toc488234491)

[Rules: 1](#_Toc488234492)

[IT Setup: 1](#_Toc488234493)

[Instructions: 1](#_Toc488234494)

# Purpose: To monitor safety stock levels to help avoid shortages at a component level.

# Related Documents:

1. Syteline, Form, Export to file

# Responsible:

Approved by: Planning Manager or Supply Chain Manager

Maintained by: Supply Chain Administrative Assistant or Production Planner II

Carried out by: Supply Chain Administrative Assistant or Production Planner II

# Rules:

1. Created once a week on Tuesday’s.

# IT Setup:

# Instructions:

1. Open Last weeks file found in [R:\Production\machine-shop\3 - Metrics\Safety Stock\Data-Depew Shop Inv Below SS](file:///%5C%5CNYDFS01%5CShared%5CProduction%5Cmachine-shop%5C3%20-%20Metrics%5CSafety%20Stock%5CData-Depew%20Shop%20Inv%20Below%20SS) (This will be referred to as the NY File)
	1. Save file as “Today’s date”
	2. In Syteline, PCB, Open the Inventory Below Safety Stock Report
	3. Filter on Planner Code Q00 to Q99 and hit print
	4. Filter on Planner Code ENG to ENG and hit print
	5. Go to R:\Syteline Reports\Your name, to open the files
	6. Delete the last row of each file
	7. Copy Appropriate columns into the data tab of your working file
		1. Copy A2-C2 (and down) into A2
		2. Copy D2-K2 (and down) into F2
		3. Copy L2-N2 (and down) into O2
	8. Make sure formulas in columns D and E and Column N are copied to the end of your data
	9. Calculate
	10. Update Pivot Table
		1. Click anywhere in the pivot table
		2. Click analyze at the top of the page
		3. Select Change data source
		4. Select all of the data on the data tab
		5. Hit refresh
2. Open Last weeks file found in [R:\Production\machine-shop\3 - Metrics\Safety Stock\Data-NC Shop Inv Below SS](file:///%5C%5CNYDFS01%5CShared%5CProduction%5Cmachine-shop%5C3%20-%20Metrics%5CSafety%20Stock%5CData-NC%20Shop%20Inv%20Below%20SS) (This will be referred to as the NC File)
	1. Save file as “Today’s date”
	2. Open Syteline, NC, Open the Items form
		1. Filter on Family code “Shop\*”
		2. Filter on Safety stock greater than 0 (>0)
		3. Run Filter
		4. Export using Syteline, Form, Export to file, and name the file U:\NC 2nd Source yy-mm-dd
	3. Open file created above changing the following to text
		1. Items
		2. Product Code
		3. Planner Code
		4. Family Code
	4. Copy and paste the data into the 2nd Site Items tab into A3
	5. Make sure the column headers match throughout the spreadsheet
	6. Copy all Item numbers starting at A3
	7. Paste Items in A3 on the Items below SS Tab
	8. If the data you pasted is longer, make sure formulas are copied down
	9. If the data you pasted is shorter, be sure to delete extra rows
	10. Calculate
	11. To verify data is pulling correctly Check column M is pulling Status. (This shouldn’t be an issue if you followed e.)
	12. Clear all comments from column AC
	13. Open Syteline, PCB, and Open the Items form
		1. Filter on Family code “Shop\*”
		2. Filter on Item status not equal to obsolete (<>o)
		3. Filter on Source Manufactured
		4. Run Filter
		5. In Syteline use, Syteline, Form, Export to File and name the file U:\NY Supply Site Item yy-mm-dd
	14. Open file created above changing the following to text
		1. Items
		2. Product Code
		3. Planner Code
		4. Family Code
	15. Copy and paste the data into the Supply Site Item tab into A3
	16. Make sure the column headers match throughout the spreadsheet
3. Open [R:\Production\machine-shop\3 - Metrics\Safety Stock\Safety Stock Metrics- PMC - Current.xlsx](file:///%5C%5CNYDFS01%5CShared%5CProduction%5Cmachine-shop%5C3%20-%20Metrics%5CSafety%20Stock%5CSafety%20Stock%20Metrics-%20PMC%20-%20Current.xlsx) and the above two files
	1. On the SS Summary Tab:
		1. Column A- Type today’s date in the next available cell
		2. Column B- Go to the NC Shop File, on the Supply Site Items tab, and filter on SS <>0 (column 33) and planner code (column 41) with Q’s and Eng
		3. Column C- In the NY file, data tab, count number of rows.
		4. Column D- This column is a formula and will calculate
		5. Column E- In the NY file, Tea Leaf tab, use the Grand total in column C.
		6. Column F- In the NY File, data tab, filter on Wip=0 (Column G) Count the number of rows. Clear filters.
		7. Column G-In the NC Shop File, Supply Site Items tab, Filter on SS>0 and Planner code with Q8\*, & Q90. Count the number of rows.
		8. Column H-In the NY file, data tab, Filter on Planner code with Q8\*, & Q90. Count number of rows.
		9. Column I- This column is a formula and will calculate
		10. Column J-Leave filters from Column H instructions and Count Column D’s Total.
		11. Column K-Leave filters from Column H instructions and also filer on WIP=0.
	2. MS SS Charts Tab:
		1. At the end of the data in column A, Add today’s date.
		2. Copy Column D’s percentage from the SS Summary Tab.
		3. Drag the Target percentage in column D down to today’s date
	3. Swiss SS Charts Tab:
		1. At the end of the data in column A, Add today’s date.
		2. Copy Column I’s percentage from the SS Summary Tab
		3. Drag the Target percentage in column D down to today’s date
	4. NC Summary Data Tab:
		1. Column A-Type today’s date in the next available cell
		2. Column B- In the NC File, Count the number of Items on the “2nd Site items” tab
		3. Column C-In the NC File, On the “Items below SS” tab, Filter on column Z by color “Red/Pink” and count the number of Items.
		4. Column D- This column is a formula and will calculate
		5. Column E- Leave filters on column Z for Red/Pink and total/sum column Z
		6. Column F-Leave filters on column Z for Red/Pink and also filter on Column AB for Red/Pink and filter on column W=0
		7. Column G-Clear Filters. Sort column AB A-Z. Filter on column AB for Green. Count the number of green cells with data.
		8. Column H- This column is a formula and will calculate
		9. Column I- This column is a formula and will calculate
		10. Save File.