

Quick guide – Capacity management for suppliers

Capacity management is the alignment of a customer's reported demands and a supplier's available production capacities.

This quick guide shows how to

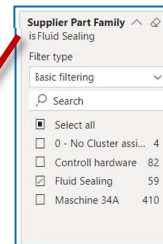
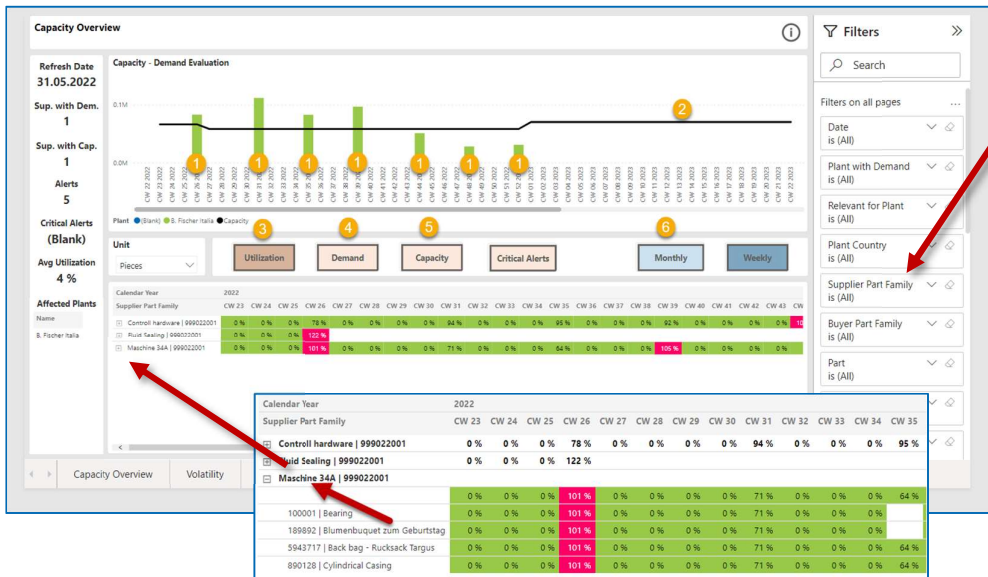
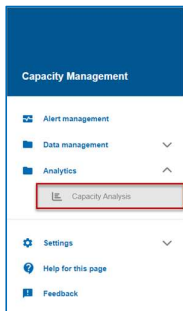
- ✓ analyze demands and capacity data
- ✓ observe simple and critical alerts
- ✓ enter and upload capacity data

1 Analyzing demands and capacity data

Demand and capacity data are analyzed in the **Capacity Analysis** dashboard.

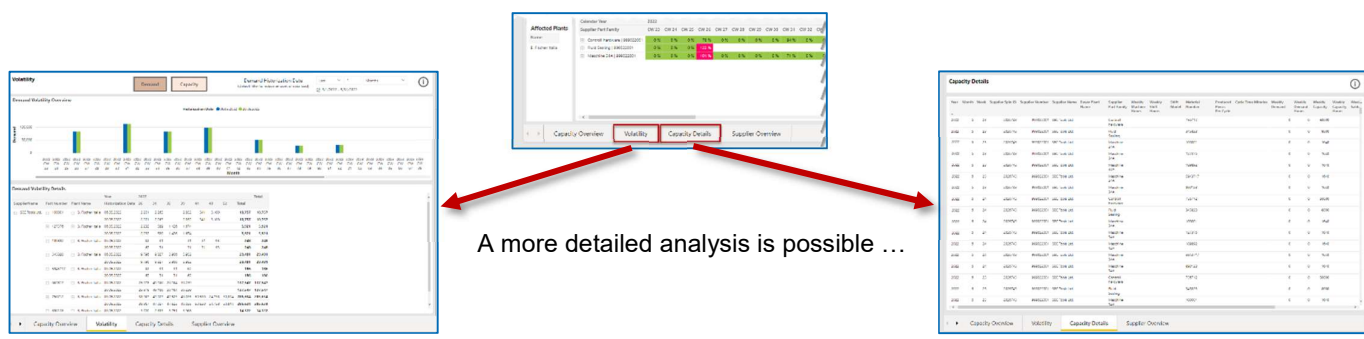
The **Capacity Analysis** dashboard displays the data by default on a weekly basis:

- 1 an overview and summary of the customer's demands
- 2 the supplier's production capacities
- 3 the utilization
- 4 shows only the demand data
- 5 shows only the capacity data
- 6 shows data on a monthly basis



Filters can be used to restrict the data to be displayed.

Demands and production capacities for individual machines, part families and parts can be displayed.



A more detailed analysis is possible ...

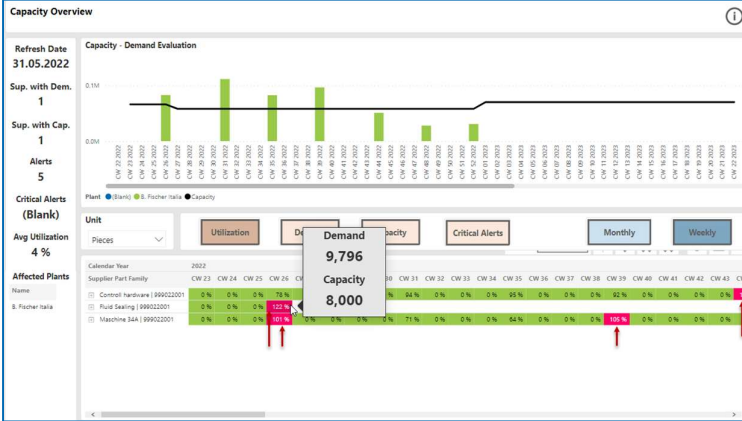
... by the determination of the volatility ...

... and the display of detailed capacity data and production parameters.

2 Simple and critical alerts

If the demand is higher than the capacity, respectively, if the capacity is lower than the demand, alerts are triggered.

Simple alerts



Simple alerts assume that the customer and supplier will find an arrangement to balance the deficit (for example, through a pre-production during demand peaks).

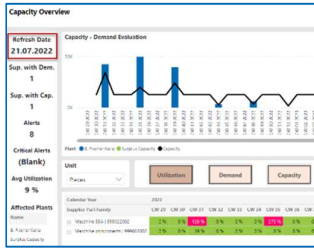
Critical alerts



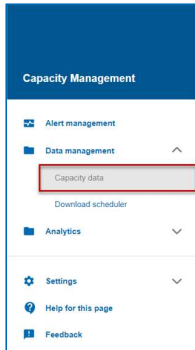
Only when the cumulative demand exceeds the cumulative capacity for twelve consecutive weeks, a critical alert is triggered.

In this case, the customer and supplier must analyze the situation and agree on appropriate measures.

3 Uploading capacity data



The customer demand data is uploaded and updated overnight.



It is recommended for suppliers to update the data for production capacities on a quarterly basis or in the case of special incidents or deviations.

Planned capacity

A weekly capacity that is normally available for a longer period of time.

Actual capacity

A deviating capacity for a limited period of time that is defined in case of special events (for example maintenance work, vacation periods, major disruptions or even special shifts).

Capacity data to be provided for the customer

The level of detail at which the capacity data is to be provided is agreed with Schaeffler in advance. The following three levels of detail are possible for the capacity data:

- ✓ Machine capacities
- ✓ Part family capacities
- ✓ Part capacities

In the application, you will only see the tab with the capacity type that is relevant for you.

3.1 Entering capacity data via a dialog window

SupplyOn > Capacity Management > Data Management > Capacity Data > Part Family Capacities

Part details | Part family capacities

+ Add capacity | Upload | Download | Refresh visualizations | View

Customer name	Supplier name	Supplier part family	Weekly capacity	Valid from	Valid until	Latest update
...	SEC Tools Ltd.	Fluid Sealing	9000	01/01/20...	01/31/20...	05/26/2022 - 16:25
...	SEC Tools Ltd.	Fluid Sealing	12000	01/01/20...	01/08/20...	05/26/2022 - 16:25
...	SEC Tools Ltd.	Machin...				/2022 - 16:25
...	SEC Tools Ltd.	Control...				/2022 - 16:25
...	SEC Tools Ltd.	Fluid Se...				/2022 - 15:05
...	SEC Tools Ltd.	Maschir...				/2022 - 17:56
...	SEC Tools Ltd.					/2022 - 17:54

Part family capacity (Modal dialog)

Customer details

Customer name: B. Fischer AG | Supplier: sig-SEC Tools Ltd., Supplier Spm ID: 2026743 | Supplier part family: ...

Planned Capacity

Weekly capacity: ... | Unit of measurement: ... | Valid from: ... | Valid until: ...

Buttons: Cancel | Add actual capacity | Take and close

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Entering a planned capacity

Capacity data for a customer

Note that the capacity to be entered below is the total capacity for the corresponding customer and not the capacity for individual plants or machines.

The screenshot shows the 'Part family capacity' form. It has a blue header with the title and a note '* Marked fields are mandatory'. The form is divided into two main sections: 'Customer details' and 'Planned Capacity'. In 'Customer details', there are fields for 'Customer name *' (B. Fischer AG), 'Supplier *' (trg-SEC Tools Ltd.; Supplier Spin ID: 2026743), and 'Supplier part family *' (Fluid Sealing). The 'Planned Capacity' section includes 'Weekly capacity *' (12000), 'Unit of measurement' (pce), 'Valid from' (1/1/2023), and 'Valid until' (12/31/2035). At the bottom, there are three buttons: 'Cancel', 'Add actual capacity', and 'Save and close'.

- 1 Make sure that the pre-selected customer name is correct.
- 2 Select a part family to which you want to define production capacities.
- 3 Enter the available capacity per week for the respective customer.
- 4 Select the appropriate unit of measurement.
- 5 Specify the period during which the planned capacity is available.

If no dates are specified, the planned capacity applies forever.

- 6 Fill in all mandatory fields (marked with *) and then save the planned capacity with **Save and close**

Adding an actual capacity

You can define multiple actual capacities.

A close-up of the 'Add actual capacity' button, which is highlighted in green. A red arrow points from this button to the 'Actual capacity' section in the main form below.

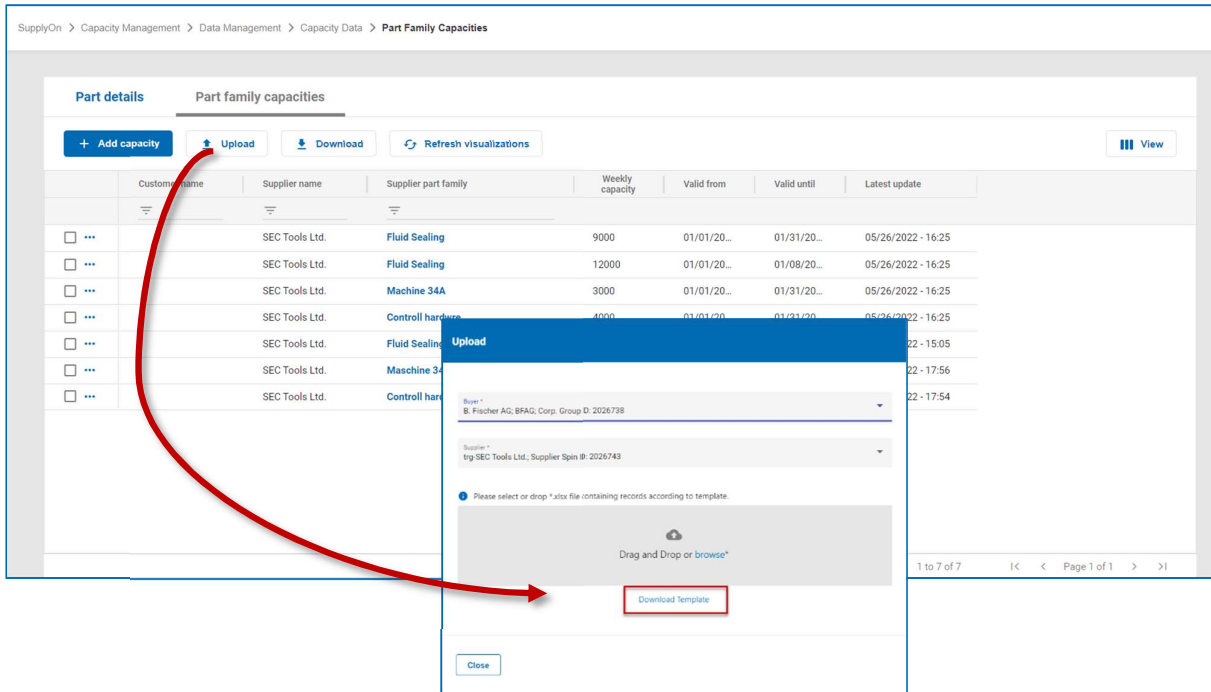
The screenshot shows the 'Part family capacity' form with the 'Actual capacity' section expanded. This section contains fields for 'Weekly capacity *', 'Unit of measurement', 'Valid from', 'Valid until', 'Comment', and 'Bottleneck reason'. A red arrow points from the 'Add actual capacity' button to the 'Actual capacity' section. At the bottom, there are three buttons: 'Cancel', 'Add actual capacity', and 'Save and close'.

If a **planned capacity** has already been defined for a certain period, an **actual capacity** overwrites the data for the period in question.

- 1 Enter a weekly actual capacity.
- 2 Determine in which period the actual capacity is valid.

- 3 Add and save the actual capacity.

3.2 Uploading capacity data via an Excel template



Download the Excel template and save it on your local computer.

1 Enter the capacity data and save the Excel file.

The fields marked in blue are mandatory.

Supplier Part Family	Part Family Capacity Weekly	Capacity Type	UoM	Valid From	Valid Until	Bottleneck Reason	Comment
Fluid Sealing	9000			2022-12-01	2022-12-31		
Fluid Sealing	12000			2022-12-01	2022-12-31		
Machine 34A	3000			2022-12-01	2022-12-31		
Controll hardware	4000			2022-12-01	2022-12-31		

Select the edited Excel file and then upload it again with **Submit**

