

PlanetTogether Knowledge Base

Complete Reference Guide - Generated December 12, 2025

183 Articles across 166 Categories

Table of Contents

portalId: 332602

Software Release Announcements Opt-In/Out

Alternate Paths specify the precedence relationships between operations

Alternate Paths

Gantt labels

User Field Mappings

Inventories

Item Storage Lots Mappings

Resource Storage Area Connector In Mappings

Resource Storage Area Connector Out Mappings

Storage Area Connector In Mappings

Storage Area Connector Out Mappings

Inventory

Items

MES

Standard Import Database

MRP (Material Requirements Planning) is an automated process that compares the demand for materials and finished goods to the on-hand and planned supply to generate planned jobs and/or purchase orders which can help to plan to satisfy unmet demands.

Jump to section:

- [When to use MRP](#whentouse)
- [MRP Data Requirements](#datarequirements)
- [MRP Settings](#settings)
- [Batching](#batching)
- [The MRP Process](#mrpprocess)

When to use MRP

The MRP Process is often performed by a business' ERP system. In this case

MPS/MRP Planning

Manufacturing Order or Operation may be Locked to its currently scheduled resource. This feature is useful when multiple eligible resources are available

Locking and Anchoring

Material Requirements Planning (MRP) is an automated process that compares the demand for materials and finished goods to the existing on-hand inventories and planned supply to create jobs and purchase orders to satisfy those demands which cannot be satisfied by existing inventory. The MPS/MRP Optimize Plan feature can be configured to create jobs and/or purchase orders and then schedule them according to the configured [Optimize Settings](https://www.planettogether.com/knowledge-v12/optimize-settings) and the rules defined in the selected [Sequencing Plan\(s\)](https://www.planettogether.com/knowledge-v12/sequencing-plans).

Be conscious of whether you're using

Shared Optimize Settings

Personal Optimize Settings

MPS/MRP Optimize Plan Settings

Metrics

Storage Areas Board

PlanetTogether automatically generates forecasts for this inventory item when its sales orders are updated.

ForecastInterval | String

This specifies the amount of

time between each auto-generated forecast.

- Quarter
- Month
- Week
- Day

NumberOfIntervalsToForecast | Int32

This defines how many forecasts should be auto-generated.

BufferStock | Decimal

This is used in setting Warning Levels.

DbrReceivingBufferDays | Double

The Receiving Buffer Days of the Inventory for the Purchase to Stock.

DbrShippingBufferDays | Double

The Shipping Buffer of the Item's Inventory.

ForecastConsumption | String

Forecast consumption is used as part of MRP. This specifies how MRP should consume forecasts before the MRP logic is executed. Accepted values:

- Backward**: Will search for forecasts with the same or earlier period.
- Forward**: Will search for forecasts with the same or later period.
- BackwardThenForward**: Starts as a backward strategy but switches to forward when no more backward forecasts are available

Inventory Mappings

PlanetTogether instances are connected to SQL databases to import the data used for scheduling and to publish the schedule data out. The Database Manager Board allows users to connect to a database so that they can easily view and customize the data as needed.

This tool is handy for schedulers to modify configuration tables that can alter the import (for example

Database Manager Board

PlanetTogether will automatically build a simple linear path. If False

Alternate Path & Node Mappings

Sales Order

Customers Board Grid Properties

Scenarios contain all the data for the factory model

Delivering Files to PlanetTogether Support

Tile

Workspace Profiles Dashboard

Tooltip hover text

User Settings

Version 12

Version 12 Availability & Adoption

Warehouses

AVEVA MES Integration Data

a Lot Code must also be set.

LotProductionDate | DateTime

Date of Lot Production

UserFields | String

An optional list of user-defined fields. For more information

Lots Mappings

a Plant is meant to represent an entire facility or location where production occurs. It is usually synonymous with a single physical factory. However

Multi-Plant Data Model

a default value of 8 hours will be assigned. For more information

Department Mappings

a slightly different message may appear but it can safely be ignored.

In Chrome

Instance Manager

access rights

Software Licensing Overview

activities may also be configured to automatically finish if/when the clock is advanced beyond the scheduled end date of the activity.

There are two types of activity reporting: **Quantity-Based Reporting** which reports progress based solely on quantities completed

Automatic Activity Reporting and Finishing

all Version 11 data from versions 11.50.20 and newer with the exception of Extensions is compatible with

Version 12. This includes scenario data as well as the integration mappings file (APSInterfaceSettings.xml) and import and publish databases. Use this guide to upgrade an instance from Version 11 to be used in Version 12.

Jump to section:

- [Server and Client .NET Upgrade Requirement](#dotnetupgrade)
- [Integration Changes](#integrationchanges)
- [Instance Services](#services)
- [Instance Start-Up Type](#startup)
- [Folder Structure](#folders)
- [File Names and File Types](#files)
- [Known Exceptions](#exceptions)
- [Unavailable Features](#unavailablefeatures)

.NET Upgrade Requirement

Version 12 requires an upgrade to .NET from version 4.8 to 6.0.4 (or newer) for both the Server Manager and the Client applications.

For more information

Migrating from Version 11

all operations of the predecessor order must be scheduled to finish before the first operation of the successor is allowed to be released to schedule. Other release rules still apply to the successor order (just-in-time start date minus JIT slack allowance); this successor manufacturing order logic adds a scheduling constraint to other existing constraints.

Any manufacturing order may be configured to be the successor of any other - the two may be part of the same job

Successor Manufacturing Orders

and Resource objects

Plants

and a textbox entry to enter a custom CRON scheduling statement.

CRON expression syntax looks a bit odd to the untrained eye. It's recommended to use this CRON expression generator to assist with curating the Automatic Actions schedule:

- [CRON Expression Generator - Quartz](https://www.freeformatter.com/cron-expression-generator-quartz.html)

Each CRON expression must provide 7 values separated by spaces. Here is a list of represented values

System Settings

and can be configured in many ways

Setup Time

and each table may be assigned to any number of resources.

All resources which are assigned a common table are considered to be part of a group. Resources that are part of the compatibility group of the table which is scheduled at any point in time will only be able to process operations concurrently if the operations are configured with a compatibility code that complies with the table logic

Compatibility Codes

and individual capabilities may be assigned to multiple resources.

Each operation's resource requirement indicates one or more required capabilities that a resource must have to be considered eligible to run the operation. Therefore

Capabilities

and the graph will show how each schedule change affects the tracked criteria. In addition

KPIs Board

and which resources are used for each task by PlanetTogether's schedule optimization logic. An ideal sequencing plan results in a streamlined production process

Sequence Planning Board

as these tend to have the greatest impact on the performance of the software. In particular

System Performance

as well as a quick link to navigate to the filtered grid layout which is producing the metric statistics so that users may further analyze why the metric is reporting the statistics that it is.

For information about configuring Metrics and Targets

Metrics Board

as well as a rough plan for the next release or two. Plans are subject to change

Product Roadmap

as well as the timeline or time window to plot.



Show Only Selected Objects

When disabled

Predictive KPI Tiles

but **ensure the service remains stopped** (existing instances can be used

PlanetTogether SDK: Getting Started

but also has some practical production scheduling use cases as well.



Standard Functionality With the Bulk Edit tile open

Object Bulk Edit Tiles

but if your project has the time and flexibility to adopt the latest import database schema

Upgrading from 12.1.x or 12.2.x to 12.3.x

but is designed to work closely with a master data set like an Enterprise Resource Planning (ERP) or a Manufacturing Execution System (MES) system. With a master data integration

Integrations: Overview

but they generally add a span of time before an item is due. Buffer penetration is calculated as a percentage based on the time the predecessor operation moves into the buffer span

Buffer Management Board

changeable

Attribute Range Table Mappings

Capability Mappings

Cell Mappings

Job Mappings

Resource Attribute Mappings

Storage Area Mappings

Transfer Order Mappings

changeable text identifier for the Operation.

***RequiredFinishQty** | Double

The Quantity of good units that the Operation must produce.

AutoCreatedCapabilityExternalId | String

The External identifier of the capability associated with the Operation was automatically created.

AutoCreateRequirements | String

Whether requirements should be automatically created for this operation.

AutoFinish | Boolean

If True

Resource Operation Mappings

changeable text identifier.

NbrOfDocks | Int32

Removed from software versions 12.3.0 and newer.

Each Warehouse can have a specified number of Docks. These Docks can be used to schedule receipt of Purchases To Stock as well as Shipments.

Notes | String

Comments or special considerations about this object.

StorageCapacity | Decimal

A Scheduling Extension can use it to limit scheduling based upon the availability of storage space.

TankWarehouse | Boolean

Removed from software versions 12.3.0 and newer.

Specifies whether this warehouse is a tank warehouse.

UserFields | String

An optional list of user-defined fields. For more information

Warehouse Mappings

chemicals

Tank Resources

download and refer to the appropriate document version:

Software Version(s)	Download Link
12.1.4.x thru 12.2.1.x	https://332602.fs1.hubspotusercontent-na1.net/hubfs/332602/Manufacturing%20Order%20Production%20Overlap%20-%2012.2.1.pdf

Key Concept

Operations from different manufacturing orders may be configured to partially or completely overlap and run concurrently with one another. This is helpful when one operation of an order is meant to supply an operation of another order with some material

and the producing operation is able to produce and transfer its completed production to inventory in batches as it completes cycles. While the producing operation is still in process

Manufacturing Order Production Overlap

download and refer to the appropriate document version:</p> <div class=hs-table-align-center style=overflow-x: auto; max-width: 100%; width: 100%; margin-left: auto; margin-right: auto; data-hs-responsive-table=true> <table style=width: 100%; border-collapse: collapse; table-layout: fixed; border: 1px solid #99acc2;> <tbody> <tr> <td style=width: 35%; padding: 4px; border-width: 1px; border-style: solid;> Software Version(s)</td> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>Download Link</td> </tr> <tr> <td style=width: 35%; padding: 4px; border-width: 1px; border-style: solid;>12.1.4.x thru 12.2.1.x</td> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>UserDefinedFields_12.2.1.pdf</td> </tr> </tbody> </table> </div> <div class=hs-table-align-center data-hs-responsive-table=true> </div> </div> <h3>Key Concept</h3> <p>User Defined Fields can be used to include extra data or information about objects imported into PlanetTogether for which the software does not already offer a property. Any number of UDFs can be added to Jobs

User Defined Fields (UDFs)

download and refer to the appropriate document version:</p> <div class=hs-table-align-center style=overflow-x: auto; max-width: 100%; width: 100%; margin-left: auto; margin-right: auto; data-hs-responsive-table=true> <table style=width: 100%; border-collapse: collapse; table-layout: fixed; border: 1px solid #99acc2;> <tbody> <tr> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>Software Version(s)</td> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>Download Link</td> </tr> <tr> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>12.1.4.x thru 12.2.1.x</td> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>LotControlledPlanning_12.2.1.pdf</td> </tr> </tbody> </table> </div> </div> <h3>Key Concept</h3> <p>A material lot refers to a batch of a product or material which was either manufactured or received together. Lots typically share a common characteristic

Lot Controlled Planning

download and refer to the appropriate document version:</p> <div class=hs-table-align-center style=overflow-x: auto; max-width: 100%; width: 100%; margin-left: auto; margin-right: auto; data-hs-responsive-table=true> <table style=width: 100%; border-collapse: collapse; table-layout: fixed; border: 1px solid #99acc2;> <tbody> <tr> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>Software Versions</td> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>Download Link</td> </tr> <tr> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;>12.2.0 and 12.2.1</td> <td style=width: 49.9197%; padding: 4px; border-width: 1px; border-style: solid;> ResourceConnectors_12.2.1.pdf</td> </tr> </tbody> </table> </div> </div> <h3>Key Concept</h3> <p>Resource connectors specify a flow relationship between two or more resources. A resource can have connections to one or more downstream resources which can enforce a constraint during scheduling to restrict which resource(s) successor operations of the same manufacturing order can be scheduled.</p> <p>A resource can be considered a From Resource or a To Resource in multiple connectors where the From Resource is the upstream resource where the work starts

Resource Connectors

due to the heavy integration with 3rd party developer DevExpress

Troubleshoot: Desktop Client User Interface Display

each tile will open as an undocked window.</p> <h3>Close open tiles</h3> <p>Click this button to close all open tile of the local board. Open tiles on other boards which are not open or not currently in focus will not be impacted.</p> <h3>Toggle Inline Menu</h3> <p>When enabled


Board Tile Settings

email support@planettogether.com or complete this form to submit a request to the Support team to enable the organization's domains for SSO connections. The Support team will need to know the name of the organization's SSO identity provider and each domain which requires access. Depending on which provider is being used

Single Sign On (SSO) Integration

especially if working in a collaborative environment with multiple schedulers.

Switching between Shared or Personal settings is done in the [User Preferences](https://www.planettogether.com/knowledge-v12/main-toolbar#user) dialog.

Quickly visualize whether Shared or Personal settings are in use by expanding the Schedule dropdown from the main toolbar and observing the icon next to each of the setting headers. If the icon is the bust of a single person  src="https://www.planettogether.com/hubfs/image-png-Jun-10-2023-10-46-36-3898-PM.png loading=lazy"/>

Optimize Settings

excluding major US

PlanetTogether Support Holidays

fine-tune

Main Toolbar

fine-tune the schedule via manual modifications as necessary

Activities Board

generally created for raw or intermediate materials. They represent an increase in the supply of materials and help keep the inventory plan up to date with incoming and outgoing inventory when materials are used to supply jobs.

The Purchase Orders Board offers insights into scheduled and received Purchase Orders over the current scheduled planning horizon and allows users to manage their Purchase Orders and/or create new ones as needed.

Jump to section:

- [Purchase Orders Grid](#pogrid)
- [Purchase Order Actions Tile](#poactions)
- [Purchase Order Bulk Edit Tile](#bulkedit)

Purchase Orders Grid

The Purchase Orders grid offers details of each Purchase Order in the data model

Purchase Orders Board

how

Storage Area Connectors

if the Attribute represents paint colors

Operation Attribute Mappings

if users open a scenarios.dat file in Notepad

Software Assembly Version Detector

in as little as 30 days. This agile methodology deploys tools that help users streamline scheduling

SureStart Integration Methodology

in hours.

SetupCost | Double

The cost incurred for Setup.

Setup Code Table Assigned Resources

PlantExternalId | String

Identifier of the Plant to which the Resource is associated.

DepartmentExternalId | String

Identifier of the Department to which the Resource is associated.

ResourceExternalId | String

Identifier of the Resource that will be associated with the Setup Code Table.

TableName | String

Name of the Setup Code Table.

See Also

- [Setup Time](https://www.planettogether.com/knowledge-v12/setup-time)
- [Import Mappings Board](https://www.planettogether.com/knowledge-v12/import-mappings-board)

Setup Code Table Mappings

including all instance folders and data.

Backup all data now before proceeding

Uninstall PlanetTogether

including non-recurring intervals.

Name | String

A common name used to identify the capacity interval.

StartDateTime | DateTime

The date and time when the capacity interval starts.

EndDateTime | DateTime

The date and time when the capacity interval ends.

Recurrence | String

The recurrence frequency type of the capacity interval. Accepted values:

- NotRecurring: The interval does not

recur. **li>Daily: The interval recurs once daily**

Recurring Capacity Interval Mappings

including plants

Scenario Management

including recurring intervals. **span style=font-size: 1rem;>*Name | String** **span style=font-size: 1rem;>A common name used to identify the capacity interval.** **span style=font-size: 1rem;>*StartDateTime | DateTime** **span style=font-size: 1rem;>The date and time when the capacity interval starts.** **span style=font-size: 1rem;>*EndDateTime | DateTime** **span style=font-size: 1rem;>The date and time when the capacity interval ends.** **span style=font-size: 1rem;>CanBeDeleted | Boolean** **span style=font-size: 1rem;>If **True****

Capacity Interval Mappings

including their required available/delivery date

Sales Orders Board

including: **ul>**

Importing Data: Overview

installation of .NET 6 is no longer required. .NET 6.0 is only required to connect to PlanetTogether instances running software version 12.2.1.61 or older. ** **In software version 12.2.1.62 and newer

Desktop Client Installation Guide

instances hosted in the PlanetTogether cloud environment share a single database for import and publish data

Standard Integration API

interactions

Create a Custom Software Package

it may be preferable to avoid making last-minute disruptions unless there is a problem such as a machine breaking down or a need to rush a crucial order through. Having too much volatility in the schedule in the short term is inefficient as it can create confusion and nervousness on the shop floor. PlanetTogether provides options to control the stability of the short-term schedule using Frozen or Stable time spans to prevent too many last minute changes. **div class=hs-callout-type-tip data-hs-callout-type=tip>

- [rel=noopener>Department Frozen Span](#departmentfrozen<span)
- [rel=noopener>Plant Stable Span](#plantstable<span)**

Note

Setup calculations are dependent on the scheduled resource having its **SetupIncluded** property set to the value **UseOperationAttributes**. Cleans calculations are dependent on the scheduled resource having its **UseAttributeCleanouts** property set to **True**. For more information

Attribute Mappings

often referred to as the **Bill of Materials (BOM)**

Stock Materials (Bill of Materials)

on-premises installations

Full Excel Integration Package

Simple Excel Integration Package

on-time vs. late deliveries per customer

Customers Board

only the **RemainingFinishQty** amount (**TotalOutputQty** minus **CompletedQty**) is added to inventory.

FixedQty | Boolean

This specifies whether the **TotalOutputQty** is a fixed number. If **True**

Product Mappings

operation

Multi-Tasking Resources

optimizations will attempt to start the Activity as close as possible to the **AnchorStartDate**.

AnchorStartDate | DateTime

The date and time at which the Activity is Anchored. (The 'Anchor' field must be set to 'True').

BatchAmount | Decimal

This field allows batching with a different value from batching based on the unit quantities produced (**BatchSize** set on the Item). For example

Internal Activity Mappings

or alter scheduling or other system behaviors. These custom packages can be added to instances to customize the workspace users' experience. Alternatively

Software Package Management

or any other SQL server may work as long as the PlanetTogether instance host server has access to it.

To install SQL Server

Server Installation Guide

or can be used as a means to update certain settings or values of a job or any of its manufacturing orders or operations. The dialog can be accessed by many different methods from many different screens typically by double-clicking or right-clicking and choosing to Open any component related to the job (the job entry itself in the Jobs Board grid; one of its scheduled activities on the Gantt or in the Activities grid; from the Inventory Plot tile that references the job; from a material requirement entry in the Materials Board grid; etc.).



Jump to section:

- [Job Properties](#jobproperties)
- [Gantt View](#ganttview)
- [Grid View](#gridview)
- [Operation Details](#operationdetails)
- [Status](#opstatus)
- [Scheduling](#opscheduling)
- [Batching/Setups](#opbatching)
- [Advanced](#opadvanced)
- [Resources](#opresources)
- [Buy-Direct Materials](#opbuydirect)
- [Stock Materials](#opstockmaterials)
- [Products](#opproducts)
- [Subassemblies](#opsubassemblies)
- [Attributes](#opattributes)
- [User Fields](#opuserfields)
- [Notes](#opnotes)

Job Properties

Job Name: A user-friendly name to identify the job.

External Id: A unique identifier for the job.

Id: A system-generated unique identifier for the job.

Need By: The date and time which

the job must be completed by before it is considered late.

- Customer:** One or more customers that the job is associated with.
- Destination:** An indication of the geographical region or address where the products that are produced by the job will be sent. For informational purposes.
- Description:** An optional text description of the job. For informational purposes.
- Order Number:** This can be used to specify the customer order number (the Sales Order(s) that the job is supplying). If using MRP in PlanetTogether to generate jobs then this field will be populated by MRP with the Job Name(s) and/or Sales Order Name(s) of the demand signal(s) which initiated MRP to generate the job. For informational purposes.

Note: If using MRP in PlanetTogether to generate jobs to satisfy demand from other jobs

Job Details Dialog

or can be used to split the work across gaps in resource capacity. Splitting can also be used to break larger operations down into smaller parts so that each part may comply with maximum quantity or volume constraints across capable resources.

Jump to section:

- [Split by Resource Quantity](#)
- [Split by Resource Volume](#)
- [Split by Primary Resource Capacity Availability](#)
- [Split Successor by Predecessor Material](#)
- [Split Successor by Predecessor Quantity Ratio](#)
- [Resource Prioritization](#)
- [Split Setup](#)

Split by Resource Quantity

Operations may be configured to split based on a resource's configured **Maximum Quantity** and/or **Minimum Quantity** values. As the optimization logic considers scheduling an operation on a resource

Auto-Split Operations

or even programmatically from a custom program by submitting a Transmission to PlanetTogether requesting a Publish to occur.

Data can be exported to a primary SQL publish database

Export and Publish Overview

or fully integrated into the software instance with the provided Excel sheet as the master data source.

Jump to section:

- [Excel Integration Overview](#)
- [Sample Data Models](#)

Excel Integration Overview

Each of the provided sample data models can be integrated using our [Full Excel Integration Package](https://www.planettogether.com/knowledge-v12/full-excel-integration-package) integration strategy. Some preparation of the SQL environment and the instance is necessary in order to use the provided Excel sheets as the master data source. This is optional though -- each data model can be loaded into any software instance by simply loading the provided scenarios.dat file.

Sample Data Models

[More information about each model coming soon... Each download includes a readme.txt with more information about the model and how to load it.]

Click the links to download the data model .zip files according to the software version you'll be running them in. It is recommended to upgrade to the latest version though for any training or demos.

Versions 12.2.0 and 12.2.1	Version 12.3.0
Job Shop	Job Shop 12.3.0
Brewery	Brewery 12.3.0
Pharma Tablets	Pharma Tablets 12.3.0

```

na1.net/hubfs/332602/Demo%20Data%20Models/Version%2012/PT_Demo_PharmaTablets_12.3.0.zip
target=_blank rel=noopener data-hs-domain-rewrite=true>Pharma Tablets 12.3.0</a></td> </tr> <tr> <td
style=padding: 4px; width: 50.0582%; border-width: 1px; border-style: solid;><a
href=https://www.planettogether.com/hubfs/Demo%20Data%20Models/Version%2012/PT_Demo_ComplexReactor.zip
target=_blank rel=noopener>Complex Reactor</a></td> <td style=width: 50.0582%; padding: 4px; border-
width: 1px; border-style: solid;><a href=https://332602.fs1.hubspotusercontent-
na1.net/hubfs/332602/Demo%20Data%20Models/Version%2012/PT_Demo_ComplexReactor_12.3.0.zip
target=_blank rel=noopener data-hs-domain-rewrite=true>Complex Reactor 12.3.0</a></td> </tr> <tr> <td
style=padding: 4px; width: 50.0582%; border-width: 1px; border-style: solid;><a
href=https://www.planettogether.com/hubfs/Demo%20Data%20Models/Version%2012/PT_Demo_CPG.zip
target=_blank rel=noopener>Consumer Packaged Goods (CPG)</a></td> <td style=width: 50.0582%;
padding: 4px; border-width: 1px; border-style: solid;><a href=https://332602.fs1.hubspotusercontent-
na1.net/hubfs/332602/Demo%20Data%20Models/Version%2012/PT_Demo_CPG_12.3.0.zip target=_blank
rel=noopener data-hs-domain-rewrite=true>Consumer Packaged Goods (CPG) 12.3.0</a></td> </tr> <tr>
<td style=padding: 4px; width: 50.0582%; border-width: 1px; border-style: solid;><a
href=https://www.planettogether.com/hubfs/Demo%20Data%20Models/Version%2012/PT_Demo_Bakery.zip
target=_blank rel=noopener>Bakery</a></td> <td style=width: 50.0582%; padding: 4px; border-width: 1px;
border-style: solid;><a href=https://332602.fs1.hubspotusercontent-
na1.net/hubfs/332602/Demo%20Data%20Models/Version%2012/PT_Demo_Bakery_12.3.0.zip target=_blank
rel=noopener data-hs-domain-rewrite=true>Bakery 12.3.0</a></td> </tr> <tr> <td style=padding: 4px;
width: 50.0582%; border-width: 1px; border-style: solid;><a
href=https://www.planettogether.com/hubfs/Demo%20Data%20Models/Version%2012/PT_Demo_Steel.zip
target=_blank rel=noopener>Steel Mill</a></td> <td style=width: 50.0582%; padding: 4px; border-width:
1px; border-style: solid;><a href=https://332602.fs1.hubspotusercontent-
na1.net/hubfs/332602/Demo%20Data%20Models/Version%2012/PT_Demo_Steel_12.3.0.zip target=_blank
rel=noopener data-hs-domain-rewrite=true>Steel Mill 12.3.0</a></td> </tr> </tbody> </table> </div>
<p>&nbsp;</p> <hr> <h3>See Also</h3> <ul> <li><a href=https://www.planettogether.com/knowledge-
v12/microsoft-excel-integration rel=noopener>Microsoft Excel Integration</a></li> <li><a
href=https://www.planettogether.com/knowledge-v12/full-excel-integration-package rel=noopener>Full Excel
Integration Package</a></li> <li><a href=https://www.planettogether.com/knowledge-v12/restore-instance-
from-backup rel=noopener>Load a Scenario File</a></li> <li><a
href=https://www.planettogether.com/knowledge-v12/standard-import-database rel=noopener>Standard
Import Database</a></li> <li><a href=https://www.planettogether.com/knowledge-v12/standard-publish-
database rel=noopener>Standard Publish Database</a></li> <li><a
href=https://www.planettogether.com/knowledge-v12/server-installation-guide rel=noopener>Server
Software Installation Guide</a></li> <li><a href=https://www.planettogether.com/knowledge-v12/instance-
manager rel=noopener>Instance Manager</a></li> </ul>

```

Sample Data Models

or more manually using other available tools.</p> <p>As a general best practice

Routing Templates Board

or operations

Splitting and Joining Jobs

or shared and downloaded by any other means. This guide will step through how to deploy software versions manually.</p> <h3>PlanetTogether Employee SharePoint: PT Builds</h3> <p>PT Builds</p>

<h3>Offline Installation</h3> <p>If the software package includes a PlanetTogetherFull12.exe installer and a PTLocalInstallationFiles collection of software package files


Offline Software Installation and Manual Deployment

or the system can be configured to determine when cleans are needed and for how long based on the sequence of scheduled operations on a resource. More specifically

Cleans

or the value may be imported via the PrimaryRequirementproperty of the Resource Requirement Mappings. Only one requirement can be deemed the Primary.</p> <p></p> <p>Adding a Helper Resource for an Operation:</p> Click the + plus sign in the bottom left corner of the Resource Requirements grid Select which capabilities are required of the new helper resource from the pop-up pane Save and

Close

 Setting Usage Start and End for Helper Resources

Helper resource requirements can be configured to start and end at different times than the Primary resource by changing the UsageStart and UsageEnd properties. The Primary resource requirement must always start at Setup and end at PostProcessing

Helper Resources

or to fetch the latest scenario file so that it can be shared with PlanetTogether Support or a server administrator for troubleshooting purposes

Download Scenario

or used for prioritizing customer orders via the [Customer Priority optimize factor](https://www.planettogether.com/knowledge-v12/sequence-planning-board#allfactors) in a sequencing plan. Lower values are given higher priority.

Region | String

An informational field which specifies a Region or location associated with the Customer.

UserFields | String

A list of user-defined fields. See: [User Defined Fields \(UDFs\)](https://www.planettogether.com/knowledge-v12/user-defined-fields)


Customer Connections Mappings

Associate one or more Customers to each Job. Multiple CustomerExternalId's may be mapped to a single JobExternalId

Customer Mappings

please [contact support](https://www.planettogether.com/knowledge-v12/kb-tickets/new) for assistance.

A good place to start to diagnose these issues is the Logs dialog from the Instance Manager. Check for errors logged at the time the instance service was started to reveal clues of the underlying issue.



Jump to a Case Study:

- [License Cannot be Locked](#)
- [Server is not automatically fetching new key files from PlanetTogether](#)
- [Server Cannot Connect to PlanetTogether License Server](#)
- [Multiple Running Instances Using the Same License Key](#)
- [The License has Expired](#)
- [Expired-not-expired](#)

Case Study: License Cannot be Locked

Overview

This is a fairly generic message which essentially means that the license is already in use.

```
*** Message ***
License could not be locked.
```

A license key may only be used to run a single instance of PlanetTogether

Troubleshoot: Instance Starting in Read-Only Mode

processes such as dye baths that group together different products can be processed simultaneously. In this case

Operation Batching

providing the organization with an accurate

AVEVA MES Integration Overview

refer to the respective tiles in the [Scenario Data Board](https://www.planettogether.com/knowledge-v12/scenario-data-board).

See Also:

- [Layouts](https://www.planettogether.com/knowledge-v12/layouts-metrics-targets)

Capacity Planning Board

resource capacities are determined by a combination of the [Resource Properties](https://www.planettogether.com/knowledge-v12/capacity-planning-board) and [Capacity Intervals](#).

Jump to section:

- [Associated Resource Properties](#)
- [Capacity Intervals](#)
- [Types of Capacity](#)

Associated Resource Properties


If necessary

Resource Capacity

resulting in a single Job. Or if there are two ManufacturingOrders from the same job next to each other

Keyboard Shortcuts

retrieve the appropriate license key files by navigating to [https://licenses.planettogether.com/](https://licenses.planettogether.com/target=_blank rel=noopener) and entering the 12-character license key into the form input. Press **Continue** when ready.



If the license key is valid

Manually Install License Key Files

schedulability of the operation will be determined by availability of the material in inventory according to the material requirement's MaterialUsedTiming setting.

AllowedLotCodes | String

This is used to specify which Material Lots are allowed to supply the Material Requirement. The Lot Code(s) of the item or lot must match this value. Multiple lots can be added

Material Mappings

scheduling

Analytics with Power BI

scheduling constraints are enforced within a time period referred to as the **Planning Horizon**. The Planning Horizon starts at the current Schedule Clock date and time

Schedule Clock & Planning Horizon

see:

[Compatibility Codes](https://www.planettogether.com/knowledge-v12/compatibility-codes rel=noopener)

Key Concept

Item Compatibility Groups can be assigned to resources and designated on production operations in order to force all resources within the group to focus on producing a single product or group of products at a time. When set up correctly

Item Compatibility

see:

- [Layouts](https://www.planettogether.com/knowledge-v12/layouts-metrics-targets target=_blank rel=noopener)

Grid Personalization

so the status will not be updated in Shop Ops.	
2004	There is no Manufacturing Order with that specific External Id

Error Codes

so while this can be assigned any string value

Forecast Mappings

special Early Access versions of PlanetTogether will be made available to members of the program. Early Access versions will be updated periodically as significant changes are introduced.

Goals:

- Provide a preview of new features so partners and users can become familiar with the software before the next official version is released.
- Allow for initial feedback on changes.

Early Access Version

An Early Access version is a pre-release of the next version of PlanetTogether that may be in one of several stages of development. As such

Early Access Program

specifying 3 means it can complete a setup process 3x faster than the time standards indicate.

AutoJoinHrs | Double

This is the number of hours from the PlanetTogether clock within which resources can be processed to auto-join.

AutoSplitHrs | Double

This is the number of hours from the PlanetTogether clock within which resources can be processed to auto-split.

BatchType | String

Specifies whether a percentage or a volume defines the batching. Accepted values:

- None
- Percent
- Volume

BatchVolume | Decimal

Specifies the number of jobs that can be batched together on the resource. If an activity's Required Quantity is larger than this value

Resource Mappings

the Inventory Plan Board offers detailed inventory-level information for every item and material used throughout the production process and provides users with a visual representation of supply and demands. The inventory plan will allow planners to ensure sufficient materials to supply incoming demands and enough time to purchase or manufacture additional materials.

Jump to section:

- [Inventory Grid](#inventorygrid)
- [Transfer Orders](#transferorderstile)

Tile Inventory Bulk Edit Tile Forecast Manager Tile Adjustments Report Inventory Plot Report </div> <h3>Inventory Grid</h3> <p>The inventory grid contains information about all inventory items

Inventory Plan Board

the Purchase to Stock is considered closed. Purchases to Stock are generally closed when all Required Quantities have been received.</p> <p> </p> <p>Description | String</p> <p>Additional text for describing the Purchase to Stock.</p> <p> </p> <p>Firm | Boolean</p> <p>This specifies that the Purchase to Stock is firm. Firm Purchases to Stock will not be deleted by MRP when MRP is used to generate Purchases to Stock/Purchase Orders.</p> <p> </p> <p>LimitMatlSrcToEligibleLots | Boolean</p> <p>Whether the material consumption should be constrained to eligible lots when this Purchase Order is consumed. If True

Purchases To Stock Mappings

the Resource is flagged as a bottleneck. All resources in the plant share the same threshold value.</p> <p> </p> <p>DailyOperatingExpense | Decimal</p> <p>Monetary costs of operating the plant for a day. Note that Resource hourly costs are also added to the KPIs' OE value

Plant Mappings

the batch should not reach out further than this value to reach the MaxOrderQty.</p> <p> </p> <p>Cost | Decimal</p> <p>The cost of the item. This value is used to calculate the value of inventory

Item Mappings

the connector cannot be used simultaneously for filling and withdrawing from a storage area. If True

Storage Area Connector Mappings

the grid layout cannot be modified so start by selecting or creating a grid layout which displays the desired editable properties

Grid Edit Mode

the highest grade takes precedence. If two cleanouts of the same grade are scheduled together

Cleanout Trigger Table Mappings

the material will only be discarded if it expires or it needs to be removed to store something else. If true

Item Storage Mappings

the options that are made available in the second dropdown may be reduced to prevent an illogical range configuration.</p> <p></p> <p>Upon performing the Compress action

Compress the Schedule

the server name or connection string should be entered without a protocol or port number. Simply localhost from the server itself or the server name by itself will suffice.</p> <p></p> <p>2. Invalid or expired SSL certificate</p> <p>This issue may be accompanied by this error message:</p> <div class=hs-callout-type-caution data-hs-callout-type=caution> <p>Certificate is expired. If you are an IT administrator click here for more information.</p> </div> <p>In these cases

Troubleshoot: Client Sign-In Manager Application

the software instance can be configured to execute the stored procedure at the time a user clicks the Refresh button in the client user interface so that the data that gets imported is always up to date with the latest changes made to the Excel workbook. For PlanetTogether cloud-hosted environments

Microsoft Excel Integration

the standard PlanetTogether integration files can be downloaded and usually those are fine to use as a starting point for any newly created instance. </p> <p>When creating a new instance which will use a particular master data source (ERP

Deploy Integration Files to Server

the table is used to list allowed or compatible codes which are allowed to schedule simultaneously. When False

Compatibility Code Table Mappings

the user will not be able to log in.

Description | String

Additional text for describing the user.

DisplayLanguage | String

Specifies which language to use in the user interface for this user. Accepted values:

- English_US**
- English_GB**

Note that English_GB uses the same text as English_US but with en-GB date and number formats.

- Chinese_PRC**
- Dutch**
- French**
- German**
- Italian**
- Japanese**
- Polish**
- Spanish**

FirstName | String

The user's first name.

LastName | String

The user's last name.

Notes | String

Comments or special considerations about the user.

Password | String

The user's password.

PlantPermissionGroup | String

The **Name** of the Plant Permission Group to assign to the user.

RequirePasswordResetAtNextLogin | Boolean

If TRUE

User Mappings

then Operations of the M.O. can schedule in more than one Plant. Otherwise

Manufacturing Order Mappings

then any resource with the appropriate capabilities specified in the resource requirement of the operation can be used as the scheduled helper for the primary resource.

Jump to section:


- [Configuring Allowed Helpers](#configure)
- [Scheduling Operations with Allowed Helpers](#scheduling)

Configuring Allowed Helpers

Allowed Helpers logic may be imported from the connected data source via the [Allowed Helper Resource Mappings](https://www.planettogether.com/knowledge-v12/allowed-helper-resource-mappings)

Allowed Helpers

then assign each user to a group to assume those permissions.

 <https://www.planettogether.com/hubfs/Knowledge%20Base%20Import/image-png-Mar-07-2023-12-01-07-2248-AM.png>

Jump to section:

- [User Management Grid](#usermanagement)
- [User Properties Tile](#userproperties)
- [User Preferences Tile](#userpreferences)
- [Scenario Permissions Tile](#scenariopermissions)
- [User Permissions Management Tile](#userpermissions)
- [Plant Permissions Management Tile](#plantpermissions)
- [Users Bulk Edit Tile](#bulkedit)

User Management Grid

The User Management grid offers quick toolbar actions to perform various actions

User Management

then change it back to Normal once the scenario has been successfully restored.

 <https://www.planettogether.com/hubfs/image-png-May-06-2023-12-12-01-3396-AM.png>

For more information about the Start-Up Type

Restore a Scenario from a Recording Backup

then configure database field-to-PlanetTogether property mappings. SQL queries can be used to filter the incoming data from the selected database table/view

Import Mappings Board

then the Connector will be used to constrain Material supply based on linked Resources.

LinkSuccessors | Boolean

This property is deprecated in software version 12.3.0 and newer. All Resource Connectors are now used to link successor activities.

If **True**

Resource Connector Mappings

then they may use the application to connect to or manage connections to the various workspaces that they interact with.

Note: This article covers the next steps after [downloading and installing the client application](https://www.planettogether.com/knowledge-v12/desktop-client-installation-guide).

Jump to section:

- [Getting Started](#getitstarted)
- [Add Instances](#addinstances)


```
rel=noopener>Add Workspaces</a></li> <li><a href=#signin rel=noopener>Connect to a Workspace</a>
</li> <li><a href=#appoptions rel=noopener>Options</a></li> <li><a href=#default-installation
rel=noopener>Default Installation Location</a><a href=#certificate-thumbprint rel=noopener></a></li>
</ul> </div> <a id=getitstarted data-hs-anchor=true></a> <h3>Getting Started</h3> <p><img class=hs-
image-align-none height=361 style=width: 688px; height: auto;
src=https://www.planettogether.com/hubfs/image-png-Dec-13-2023-09-06-07-0262-PM.png width=688
loading=lazy></p> <p>Each time the sign-in application starts up the user is required to provide login
credentials. These credentials will be used to evaluate and authenticate the user to determine which instance
workspaces they have access to connect to. If this is a user's first time connecting
```

Client Sign-In Manager Application

though these can be used in conjunction with software customizations/extensions.

Bottleneck Threshold: Defines the threshold for the percentage of Capacity Bottlenecked Activities that can be scheduled before the Plant is flagged as a bottleneck.

Daily Interest Rate: This rate is factored into various financial KPIs in the [KPIs board](https://www.planettogether.com/knowledge-v12/kpis-board).

Daily Operating Expense: This rate is factored into various financial KPIs in the [KPIs board](https://www.planettogether.com/knowledge-v12/kpis-board).

Description: A text description of the Plant. Used primarily for informational purposes.

External Id: A unique identifier for the Plant.

Heavy Load Threshold: Defines the threshold for the percentage of a Plant's capacity allowed to be allocated in the short term before it's flagged as being Heavily Loaded.

Invested Capital: An informational field to track the amount of money which has been spent to date on equipment

Capacity Planning Board Grid Properties

tiles

Modern User Interface

try to start it from the Services window. If it fails to start

Troubleshoot: Instance Manager


two Operations with Attention Percents of 60% and 40% could schedule to run simultaneously. A maximum of 100% summed across all simultaneous Operations is enforced. For this to have an effect

Resource Requirement Mappings

type='hsvideo2'

Partners Resource Hub

typically: `C:\ProgramData\PlanetTogether\IntegrationFiles`



AVEVA MES Integration Setup

using any number of available scheduling constraints

Optimization

yields

Product Rules

```
<div class=hs-embed-wrapper style=position: relative; overflow: hidden; width: 100%; height: auto; padding: 0px; max-width: 540px; min-width: 256px; display: block; margin: auto; data-service=js.hsforms data-script-embed=true data-responsive=true><div class=hs-embed-content-wrapper><script charset=utf-8 type=text/javascript src=//js.hsforms.net/forms/embed/v2.js>&nbsp;</script> <script> hbspt.forms.create({ region: na1
```

License Request Form

Key Concept

Any server or test machine that hosts PlanetTogether instances is required to be configured with an SSL certificate for increased security. The most secure option is to procure and install a signed and trusted certificate from an internal or external certificate authority which matches the server name and/or network address that users will use to connect to the PlanetTogether instances. Alternatively

SSL Certificate Management

Key Concept Attributes are custom properties that can be assigned any string or integer value and assigned to various objects. These are meant to be used to track various data that PlanetTogether doesn't already have a standard property for. They can also be used to configure and determine operation setup or clean processes.

Attributes

Key Concept Each PlanetTogether instance workspace can be configured to log user activity and errors to an Audit Log database. This can be helpful to understand user actions

Audit Log

Old Article Versions

This article is updated to reflect the latest software functionality. For older software versions

Standard Publish Database

AI Chatbots

PlanetTogether Knowledge Base V12

Feedback & Support

Request Support

Getting Started

Server Administration

Object Import Mappings

Allowed Helper Resource Mappings
Attribute Code Table Mappings
Capability Assignment Mappings
Capacity Interval Resource Mappings
Plant Warehouse Mappings
Required Capabilities Mappings
Successor Manufacturing Order Mappings

Server Administration

Installer Downloads

Software Releases & Roadmap

Software Installation and Upgrades

<https://www.planettogether.com/knowledge-v12/ai-chatbot-v2>

PlanetTogether Bot Library

<https://www.planettogether.com/knowledge-v12/gantt-board>

Gantt Board

<https://www.planettogether.com/knowledge-v12/it-reference-guide>

IT Reference Guide

<https://www.planettogether.com/knowledge-v12/jobs-board>

Jobs Board

<https://www.planettogether.com/knowledge-v12/layouts-metrics-targets>

Layouts

<https://www.planettogether.com/knowledge-v12/materials-board>

Materials Board

<https://www.planettogether.com/knowledge-v12/product-feedback>

Product Feedback

<https://www.planettogether.com/knowledge-v12/release-notes-12.1.3>

Release Notes: 12.1.3

<https://www.planettogether.com/knowledge-v12/release-notes-12.1.4>

Release Notes: 12.1.4

<https://www.planettogether.com/knowledge-v12/release-notes-12.2.0>

Release Notes: 12.2.0

<https://www.planettogether.com/knowledge-v12/release-notes-12.2.1>

Release Notes: 12.2.1

<https://www.planettogether.com/knowledge-v12/release-notes-12.3.0>

Release Notes: 12.3.0

<https://www.planettogether.com/knowledge-v12/sales-order-mappings>

Sales Order Mappings

portalId: 332602

Software Release Announcements Opt-In/Out

Opt in or out of new General Availability software release announcement emails

[View Online](#)

Enter your information and choose whether to **Opt in** or **Opt out** of receiving email announcements whenever a new Version 12 General Availability software release is made available.
