



*Inventory Analyst 2.0*

*Guide*

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## Document Scope

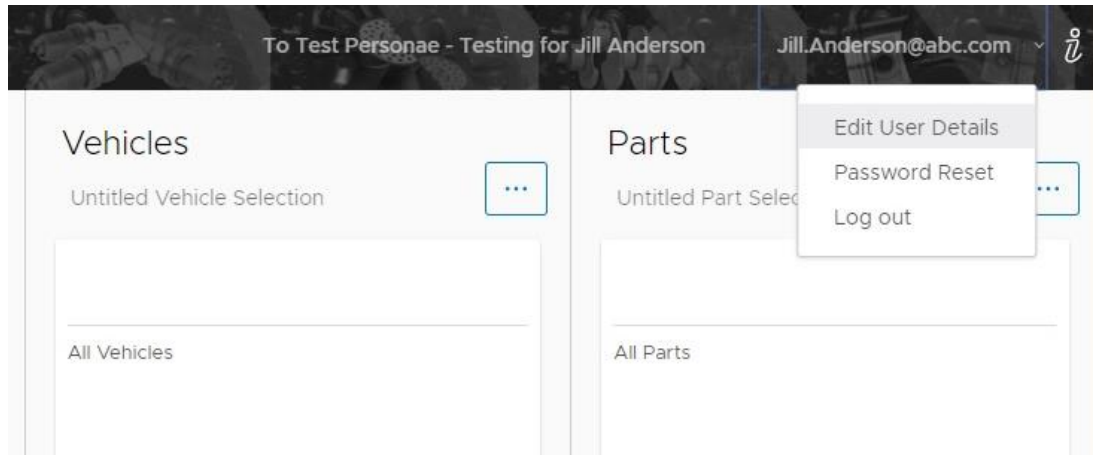
The emphasis of this document is to guide users (who will have varying permission levels) through the process of operating Inventory Analyst 2.0. The guide has separate sections to address different permission levels: (a) for all users, and (b) for organizational admins.

This document is predicated upon the user already belonging to an organization on the app. This guide will then walk users through various processes. The first is for all users, and shows how to edit a user on the organization. The next few steps are for organizational admins. The first of these is how to upload a part catalog as well as a part to vehicle catalog to the app. Next, the guide walks a user through the process of obtaining and modifying replacement rates. Following this, the guide will show users how to upload adjustment files both for county and vehicles. The next sections of the guide all deal with the rather involved process of creating selection filters. The latter are of three sorts: (a) regions, (b) vehicle, and (c) parts.

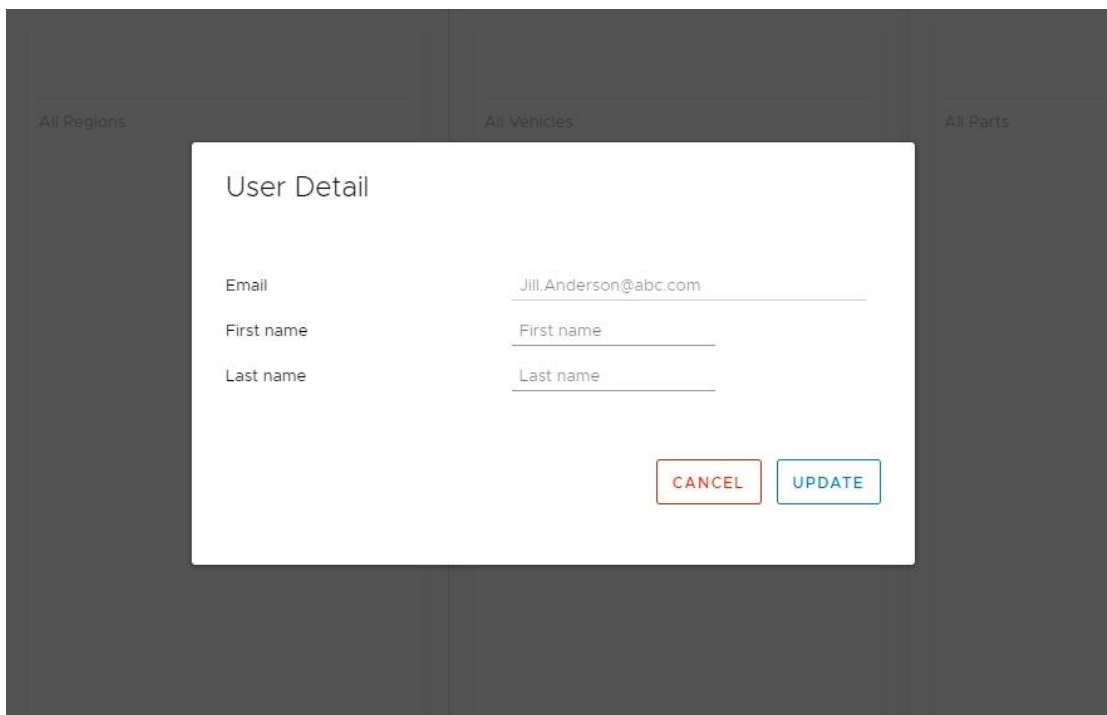
## For All Users

Edit a user:

From the header, open the dropdown by clicking on the displayed login email address.



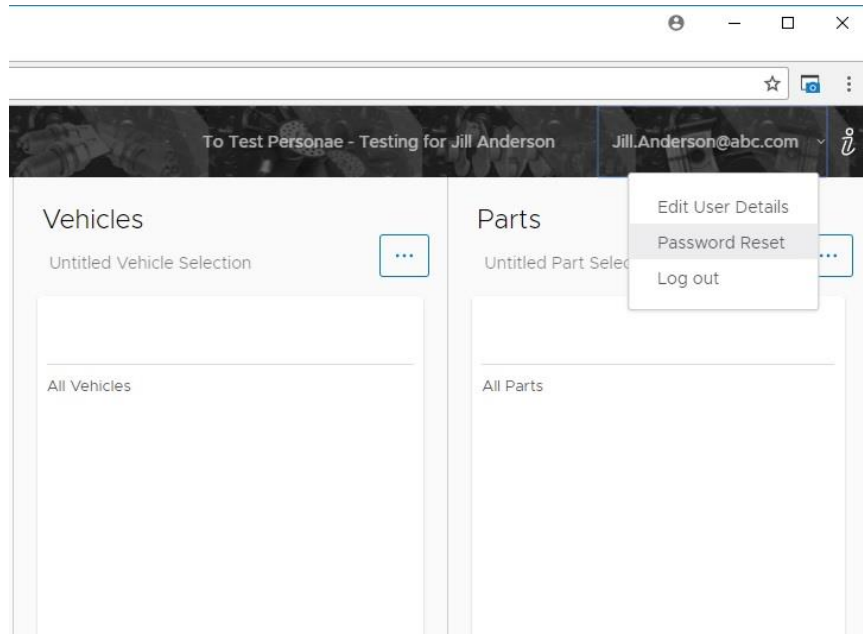
Then, select "Edit User Details." This will bring up the following display:



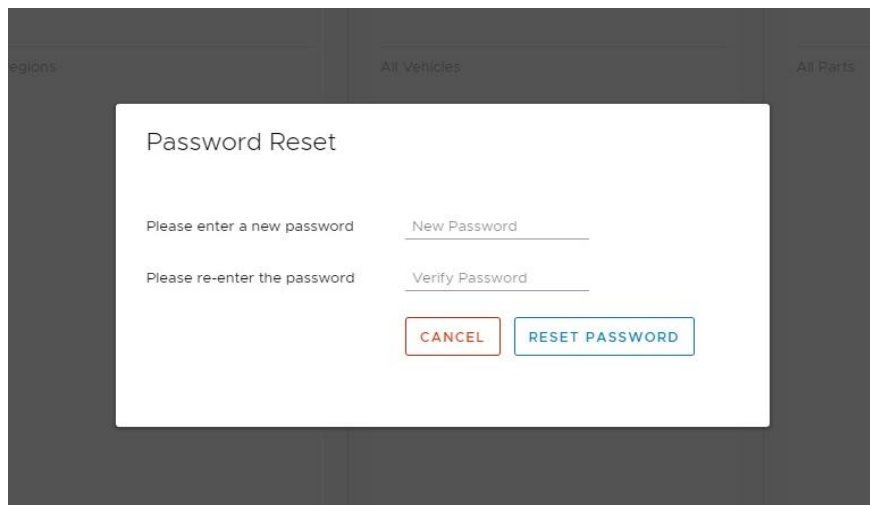
User enters email, first and last name into the form and clicks "Update."

Create a Password:

First, click the email address on the header:



Click "Password Reset" and user will see the following display:

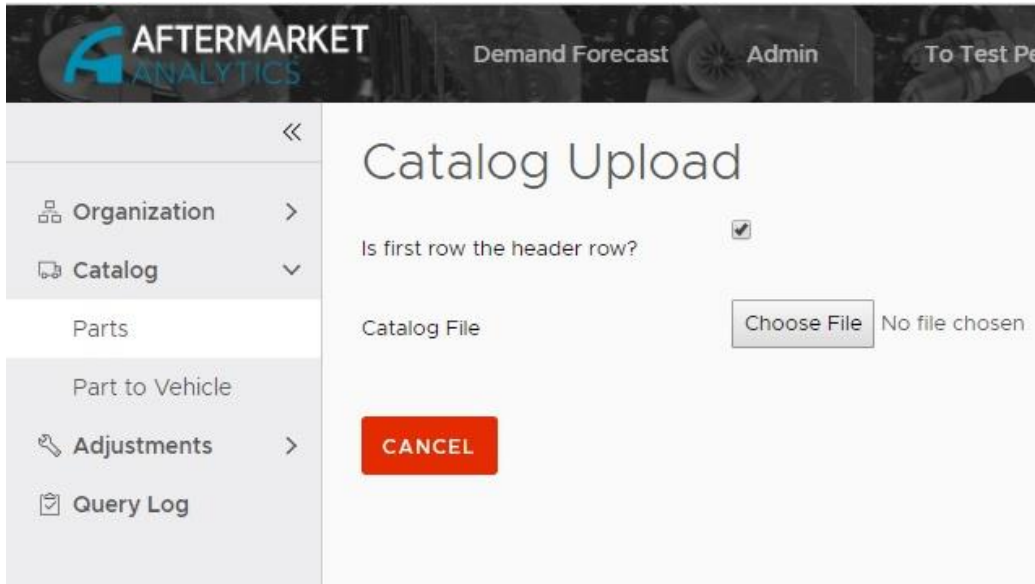


Fill in the Password Reset form with desired new password and verify it in the second line and click "Reset Password."

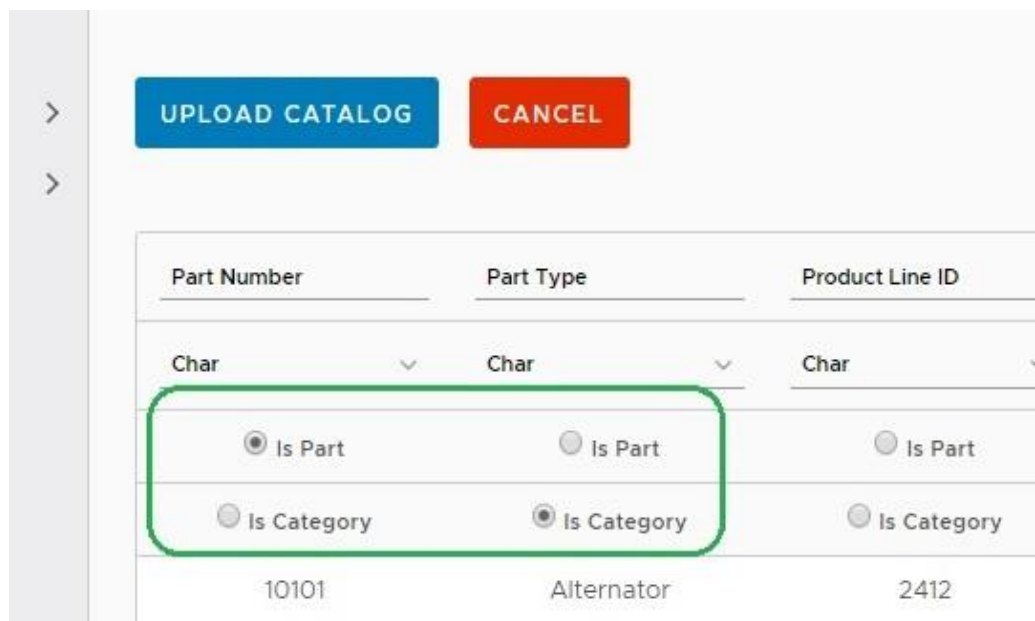
## For Organizational Admins

Uploading a Parts Catalog:

Firstly, upload a “Parts” catalog. Start the process by clicking “Admin” on the header. Then, select “Catalog” from the sidenav. Then select “Parts,” as pictured below:



Then, click the “Choose File” button, and select and load an appropriate file using file explorer. A user then selects two of the radio buttons which appear upon uploading as detailed below:



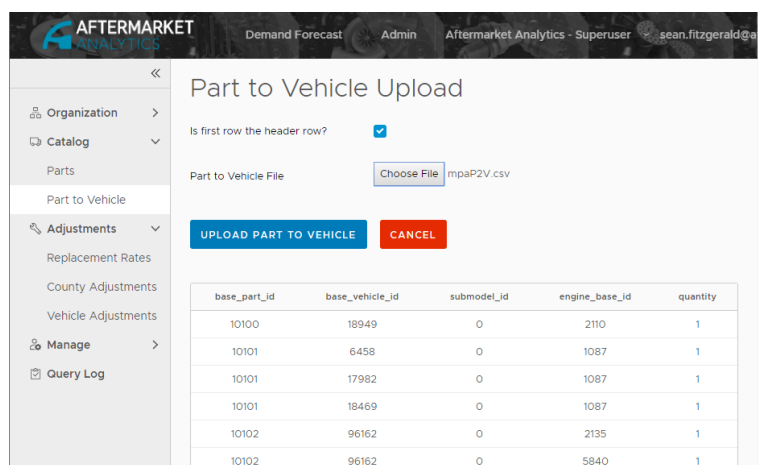
Then, scroll to the far right of the window, revealing the final two categories. The latter need to be altered in terms of their data type from “Char” to “Text” as pictured:

	Application Notes	Buyers Guide
	Text	Char
Part	<input type="radio"/> Is Part	Char Date Decimal Integer Text
Category	<input type="radio"/> Is Category	
A	Primary alt., w/ Armored Body Eq	2003 - 2005 Mercedes-Benz S55 AMG
A	w/ Valeo alt.	2011 - 2015 BMW 740Li; 2011 - 2015 BMW 740i
A	w/ Mitsubishi 110 amp alt.	2011 - 2016 Nissan Juke

Once these final two columns have been changed to “text,” click “Upload Catalog.”

### Upload Part to Vehicle:

Next, upload a “Part to Vehicle” file. To do this, go to “Catalog” and select “Part to Vehicle” from the sidenav. Click the “Choose File” button. Select an appropriate file to upload. Please note that the template for the data in the file to be uploaded must be formatted strictly as follows: (1) Part Number, (2) BaseVehicle ID, (3) Submodel ID, (4) EngineBase ID, (5) Qty (see below).



base_part_id	base_vehicle_id	submodel_id	engine_base_id	quantity
10100	18949	0	2110	1
10101	6458	0	1087	1
10101	17982	0	1087	1
10101	18469	0	1087	1
10102	96162	0	2135	1
10102	96162	0	5840	1

Then, click the blue “Upload Part to Vehicle” button, and user should see a message: “Part to Vehicle upload success.”

Part to Vehicle Upload

Is first row the header row?

Part to Vehicle File  mpaP2V.csv

base_part_id	base_vehicle_id	submodel_id	engine_base_id	quantity
10100	18949	0	2110	1
10101	6458	0	1087	1
10101	17982	0	1087	1
10101	18469	0	1087	1
10102	96162	0	2135	1
10102	96162	0	5840	1
10102	96163	0	2135	1
10102	118441	0	2135	1
10102	118441	0	5840	1
10102	118442	0	2135	1

147938 records

Successfully imported part to vehicle.

### Replacement Rates:

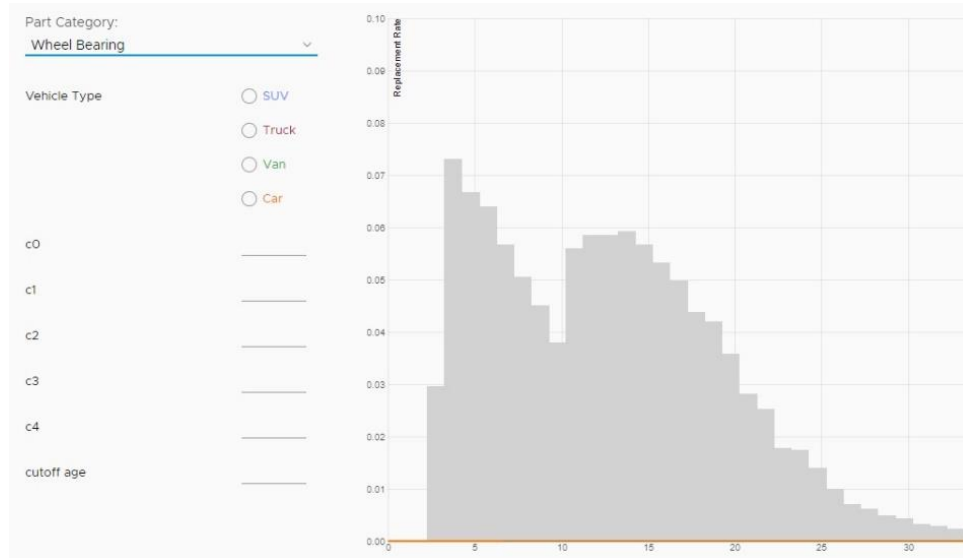
Next a user can obtain replacement rates, as well as change the coefficients of those rates. In order to do this, select “Adjustments” from the sidenav, and select “Replacement Rates.” At this point, one needs to select from the dropdown “Part Category” in order to initiate the appearance of a graph.

Part Category:

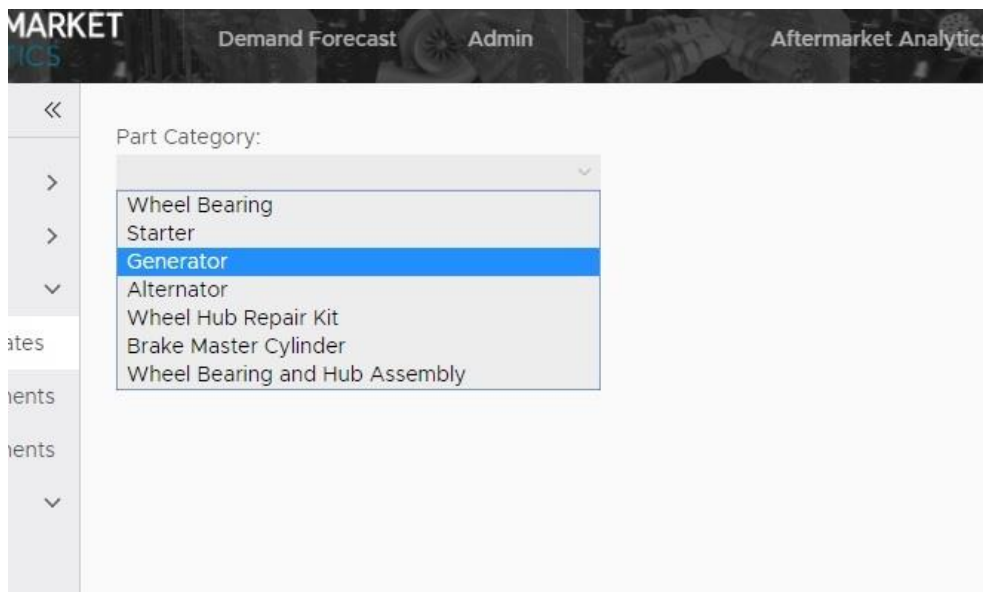
Select a Part Category to configure replacement rates.



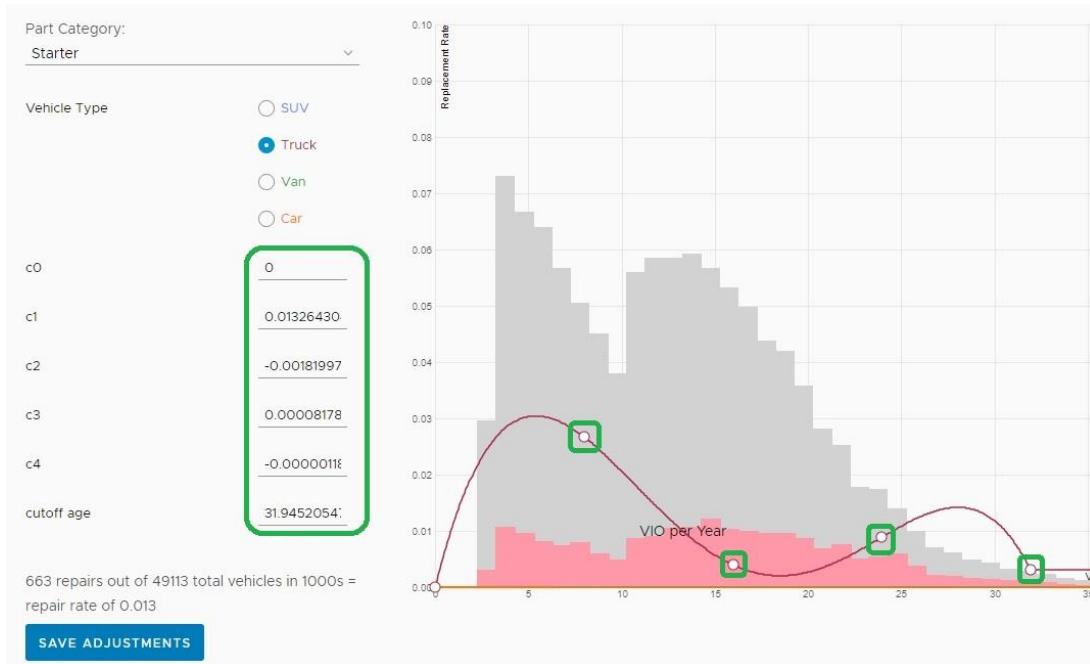
Select the desired “Part Category” which will bring up a display like this:



When on the above screen, select the desired “Part Category” from the dropdown.

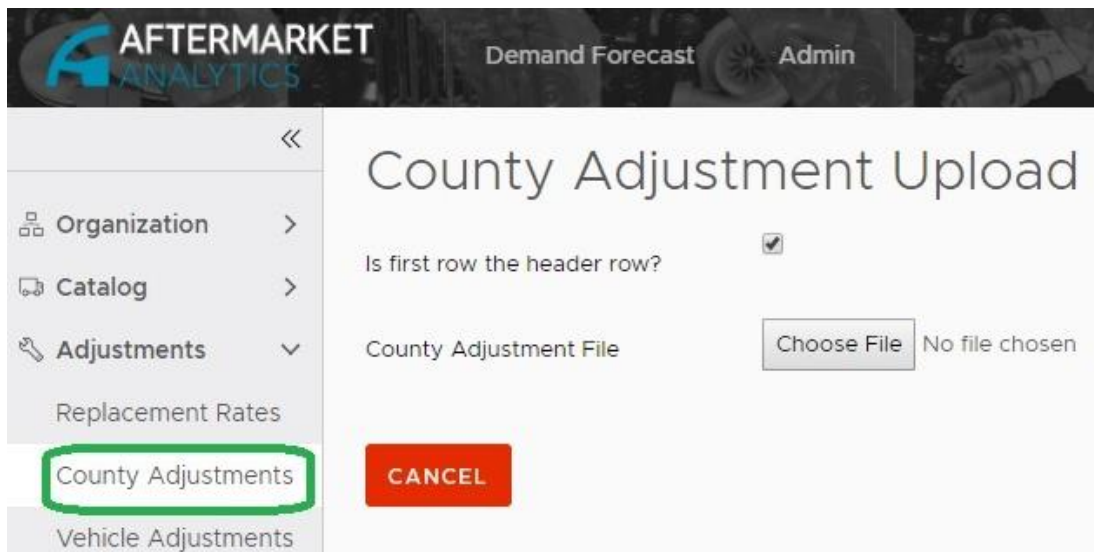


Then a user may enter coefficients in either one of two methods. The first method is to drag the circular graph points (see figure below). The second is to manually enter coefficients into the lines provided (also see below).

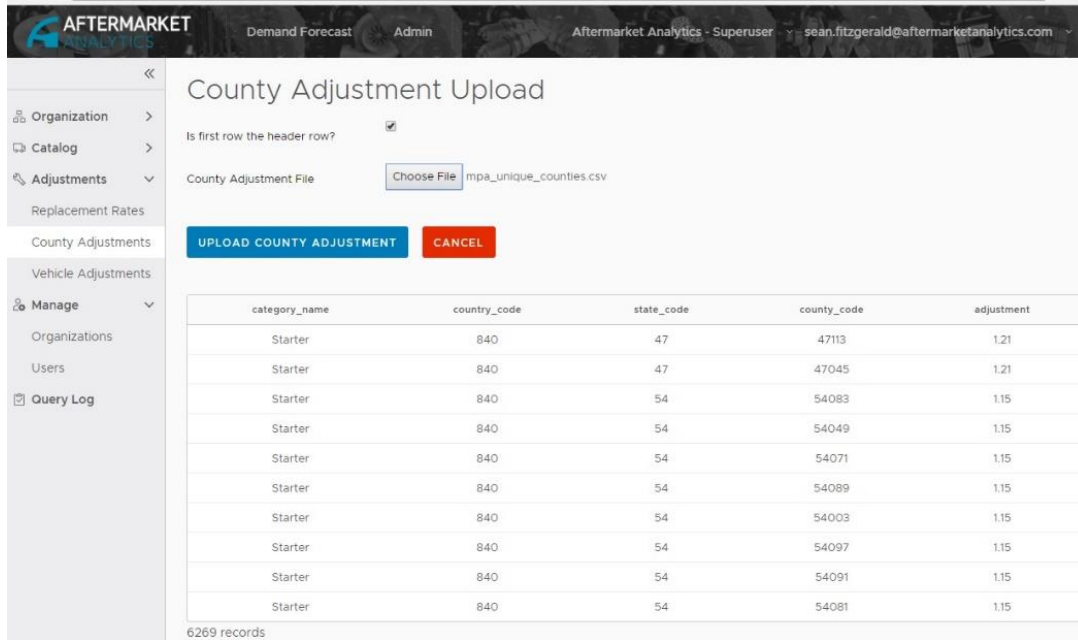


### County Adjustment Files:

Next a user may upload county adjustment files. User initiates this process by clicking “Admin” on the header. Then, select “Adjustments” from the sidenav. This will open a dropdown. Select “County Adjustments.”

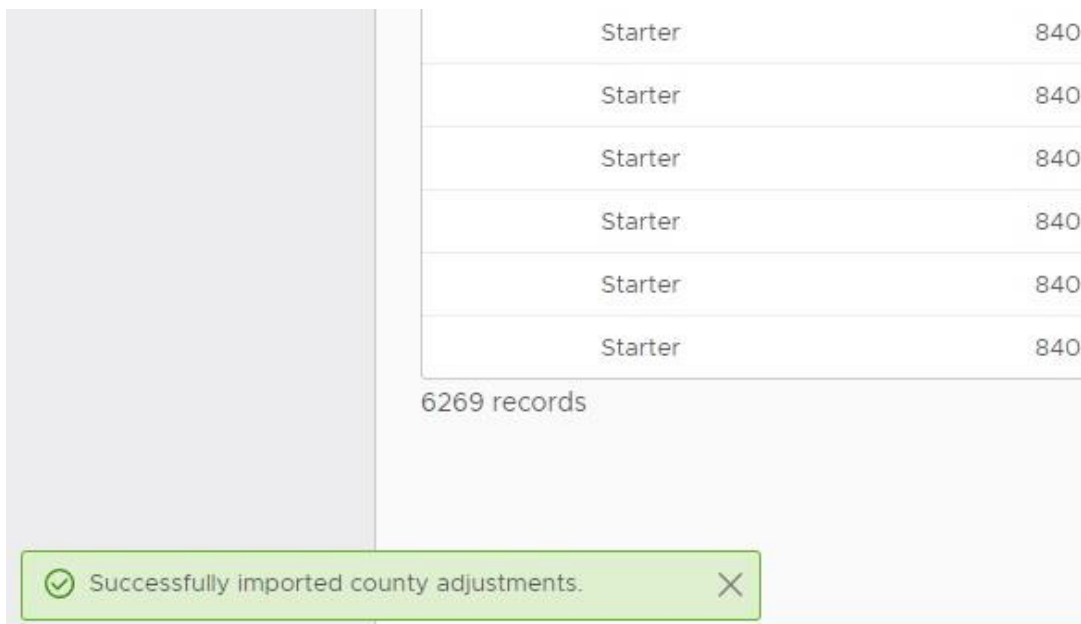


Next click the “Choose File” button, and select the appropriate County Adjustment file. At this point, the screen will show as follows:



category_name	country_code	state_code	county_code	adjustment
Starter	840	47	47113	1.21
Starter	840	47	47045	1.21
Starter	840	54	54083	1.15
Starter	840	54	54049	1.15
Starter	840	54	54071	1.15
Starter	840	54	54089	1.15
Starter	840	54	54003	1.15
Starter	840	54	54097	1.15
Starter	840	54	54091	1.15
Starter	840	54	54081	1.15

This action prompts a message (see below): “Successfully imported county adjustments”:



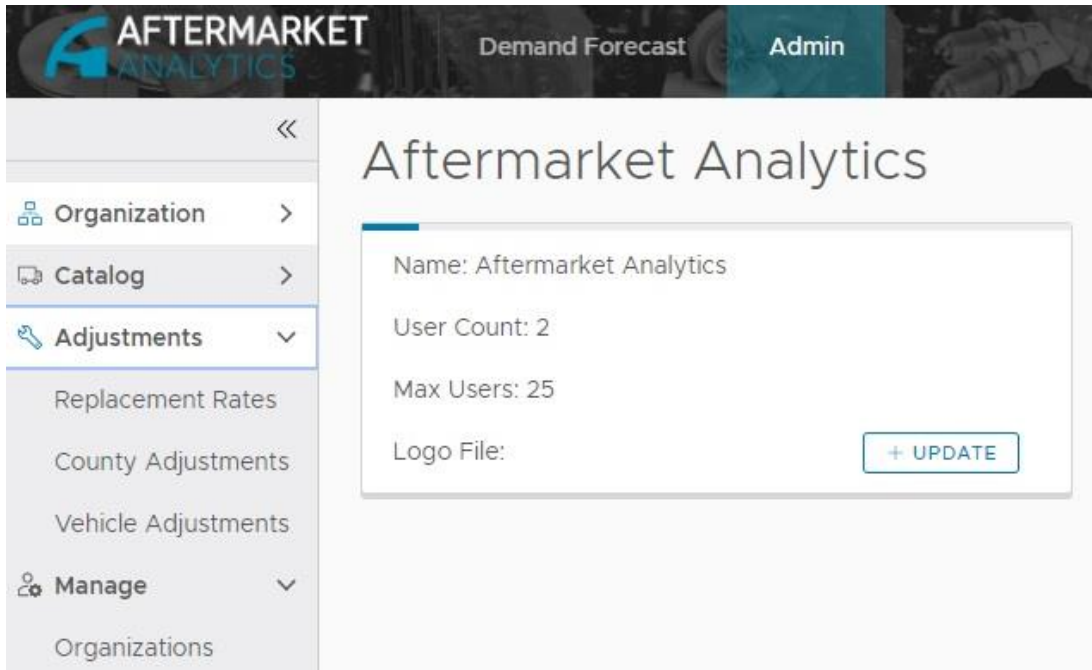
Starter	840
Starter	840
Starter	840
Starter	840
Starter	840
Starter	840

6269 records

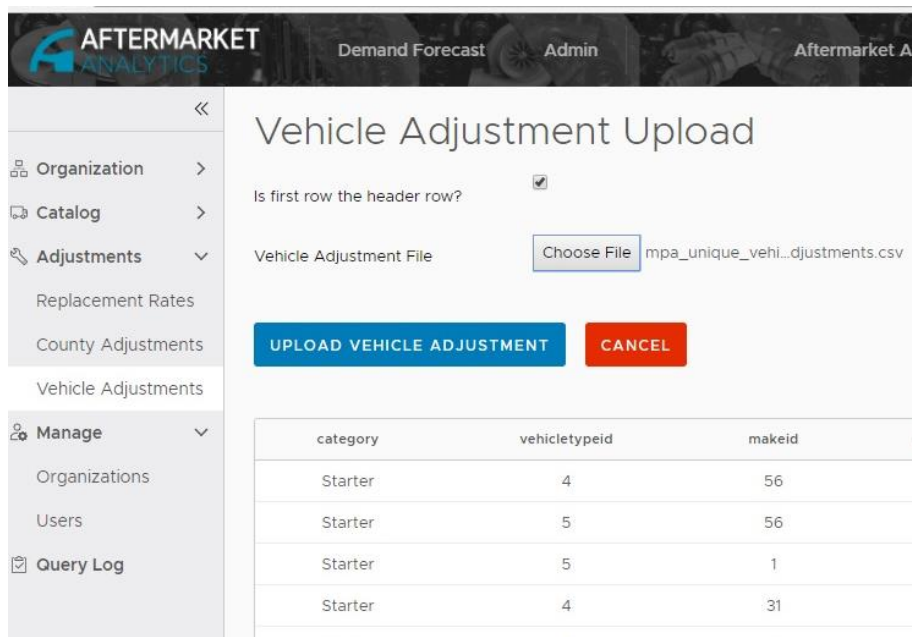
✓ Successfully imported county adjustments. ✕

### Vehicle Adjustment Files:

First select the “Admin” tab from the header. Then, on the sidenav, open a dropdown by selecting “Adjustments.”



Select “Vehicle Adjustments” from the sidenav. Click the “Choose File” button, and select the appropriate vehicle adjustment file.



Click the “Upload Vehicle Adjustment” button. When the process of uploading is completed, a message will appear: “Successfully imported vehicle adjustments.”

Starter	4
Starter	5
Starter	5
Starter	5
Starter	5
Starter	5
Starter	4

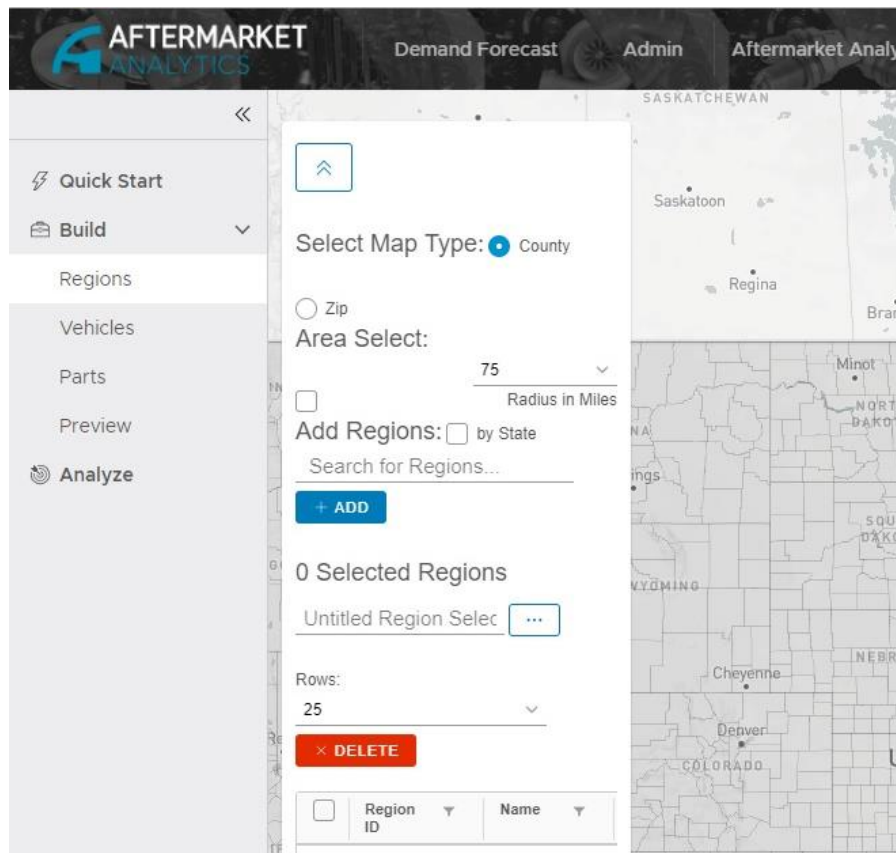
3250 records

✔ Successfully imported vehicle adjustments. ✕

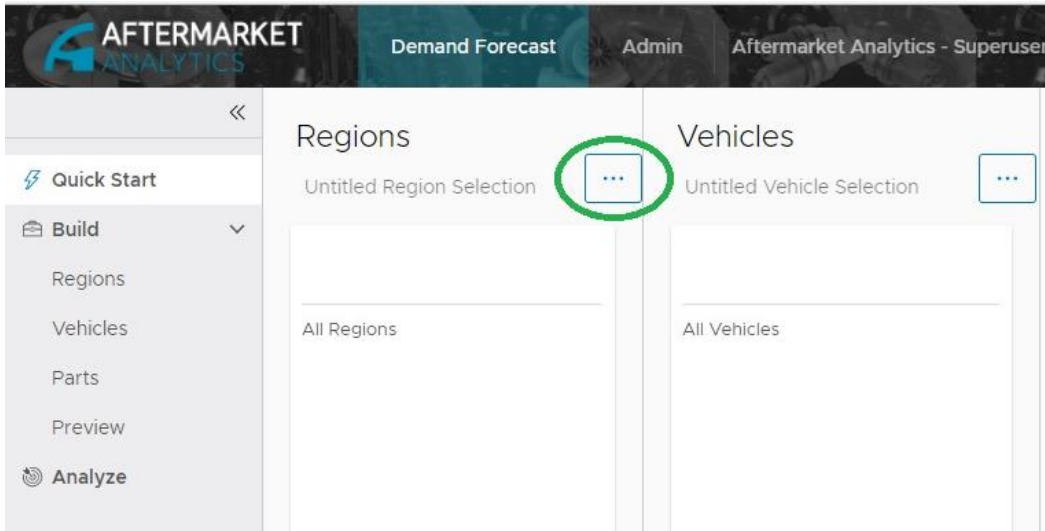
### Selection Files—Region Selector:

Create a selection filter for regions using the Region Selector. Start by clicking “Demand Forecast.”

Then, on the sidenav, select “Build,” thereby opening a dropdown. From the dropdown, select “Regions.”

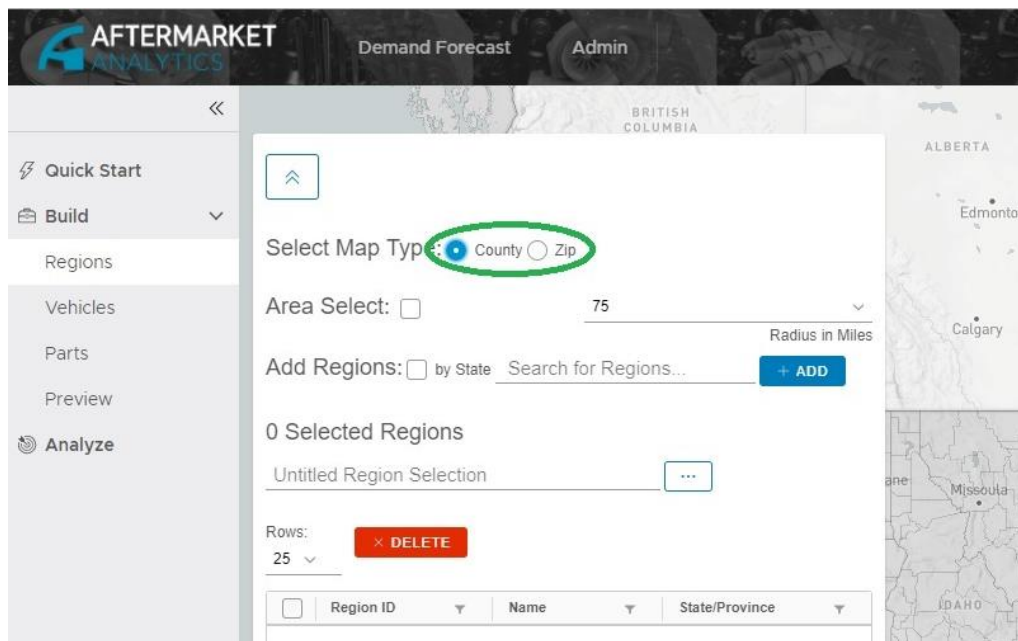


An alternative route to generating the same screen as the above is available on the home page. This is done by clicking the “more options,” or “three-dots menu” adjacent to “Regions” (see below), and selecting “Build” from the dropdown.



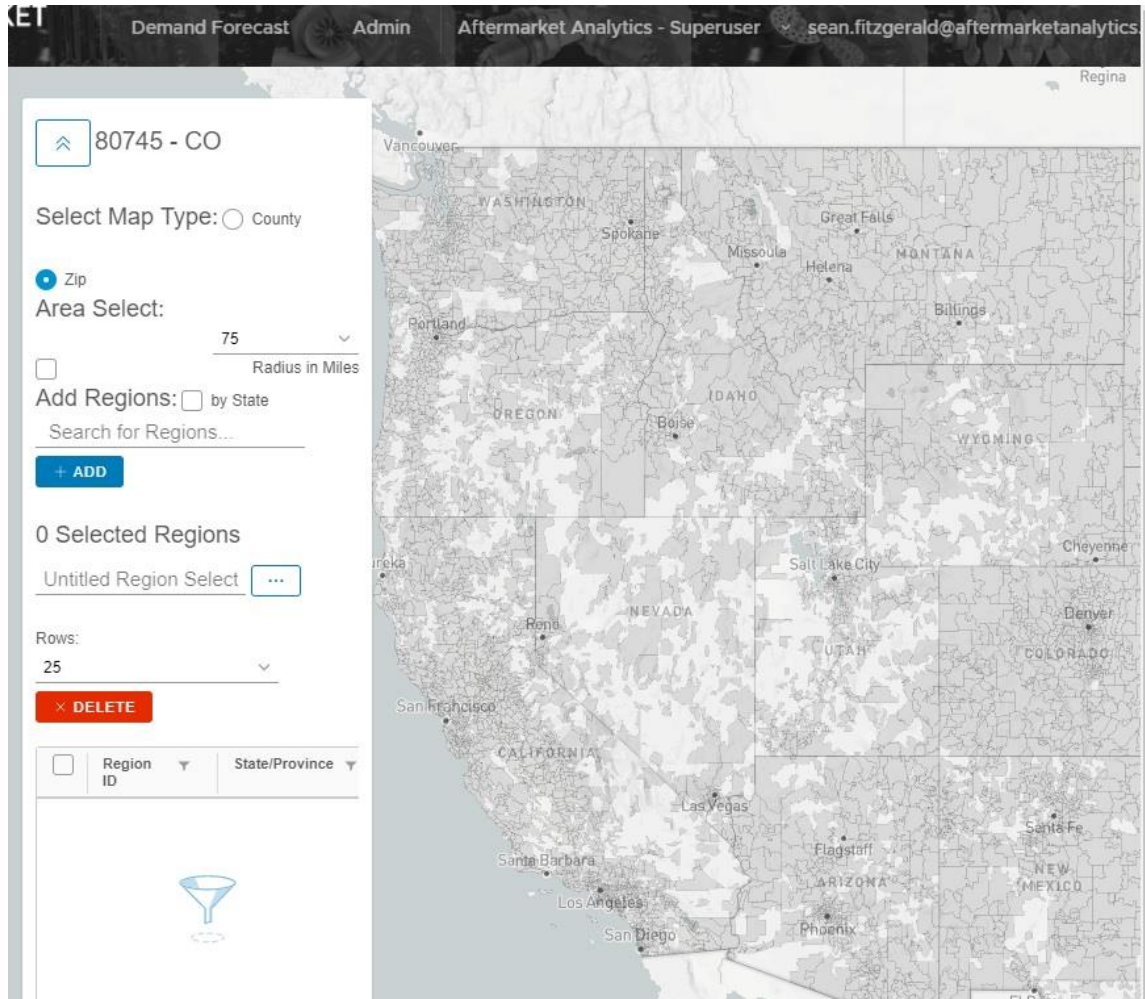
Once on the Regions Selector, a user can make a number of selections and entries.

Firstly, one can select the “Map Type” either by leaving “County” selected or selecting the radio button adjacent to “ZIP Code” in order to make selections on the map via ZIP codes (see below):





[Note: when rendering the map by ZIP code, there will appear many blank areas on the map, particularly in the western states. This is because these areas are governmentally owned and possess no ZIP codes (see below).]



Next, user can select areas on the map via a number of methods (see screenshot under the following list):

- (1) directly clicking on areas of the map (in order to select individual counties or ZIP code areas),
- (2) using the “Area Select” feature, by choosing a radius to include in selection by specifying length of the desired radius of a search (using the adjacent dropdown), and
- (3) searching regions via the “Search for Regions” line (please note that in addition to searching by county, a user can search by state also if user clicks the box next to “by State”).

⬆
93543 - CA

Select Map Type:  County  Zip

Area Select:  75 Radius in Miles


Add Regions:  by State  + ADD

0 Selected Regions

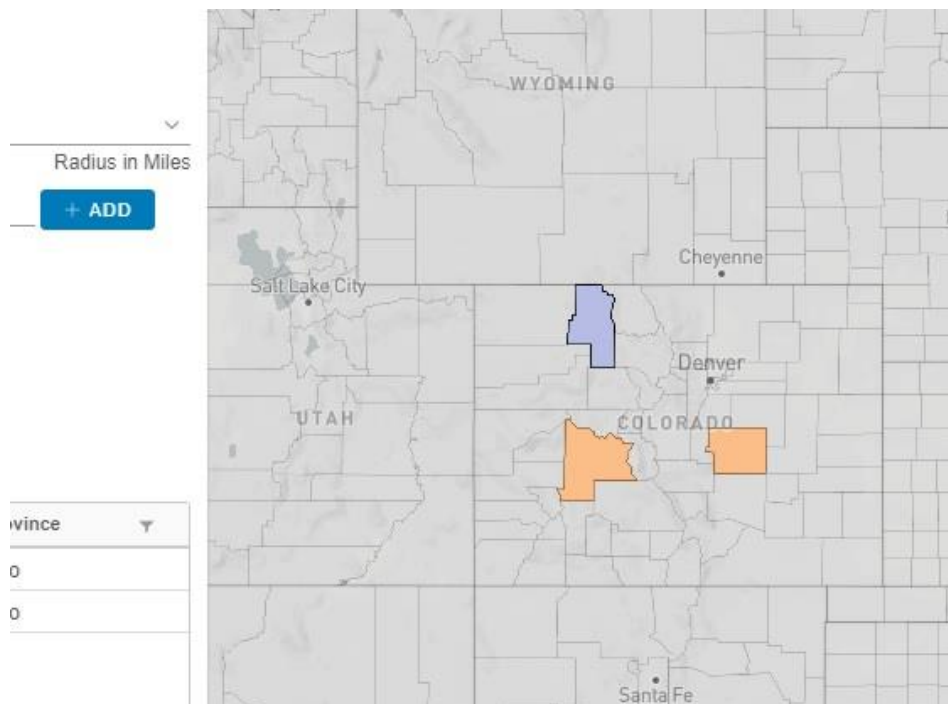
Untitled Region Selection ...

Rows: X DELETE

25 v

<input type="checkbox"/>	Region ID	State/Province
		

To illustrate (1) from the above list, here is the appearance of the map when one is selecting by county:





To illustrate (2) using the “Area Select” feature, refer to the following:

Select Map Type:  County  Zip

Area Select:

Add Regions:  by State

0 Selected Regions

Untitled Region Selection

Rows:  25

<input type="checkbox"/>	Region ID	Name	State/Province

The dropdown is for selecting the width/height of a search area. Once user chooses the desired radius of the search, the appearance is as pictured below:

Area Select:  100   
Radius in Miles


Add Regions:  by State

0 Selected Regions

Untitled Region Selection

Rows:  25

<input type="checkbox"/>	Region ID	Name	State/Province



The third method from the above list, is the process of searching out specific states, counties or ZIP codes by filling out the “Search For Regions” query line. By way of illustration, here is the appearance when searching “by State”:

Select Map Type:  County  Zip

Area Select:  75 Radius in Miles

Add Regions:  by State

ala

Alabama  
Alaska

Selected Regions

Untitled Region Selection

Rows:  25

<input type="checkbox"/>	Region ID	Name	State/Province
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When searching by county, the “Search for Regions” line populates as follows:

Select Map Type:  County  Zip

Area Select:  75 Radius in Miles

Add Regions:  by State

A

Alachua - Florida  
Appling - Georgia  
Atkinson - Georgia  
Ada - Idaho  
Adams - Idaho  
Adams - Illinois  
Alexander - Illinois  
Adams - Indiana

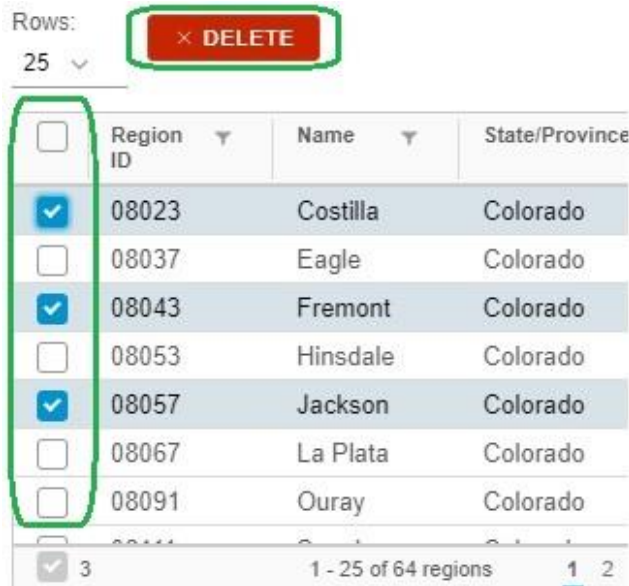
Selected Regions

Untitled Region Selection

<input type="checkbox"/>	Region ID	Name	State/Province
--------------------------	-----------	------	----------------



User can prune the listed output in terms of counties or ZIP codes displayed. This is done by selecting individual ZIP's/counties using the checkboxes adjacent to said ZIP's/counties followed by clicking the "Delete" button:



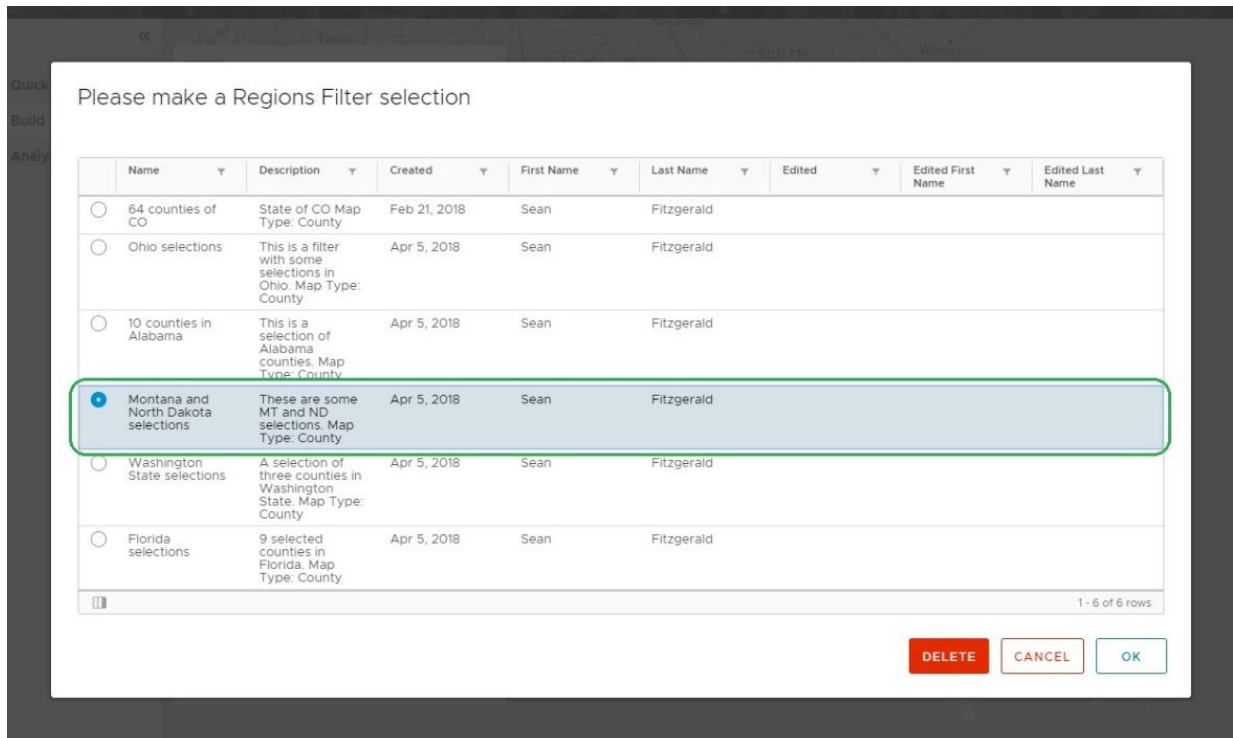
To clear all selections, user can click the More Options, or ellipsis menu and selecting "Clear" from the dropdown.



User can save the regions selection filter by first entering a title into the "Untitled Region Selection" line. Then user clicks the more options or ellipsis menu and selects "Save."



User can also load saved selection filters using the “Load” selection on the ellipsis menu. Doing so will prompt a dialog wherein user may select any and all desired selection filters.



Once user has selected the desired selection filter, as pictured above, user may click the “OK” button to open selected filter.

At this point, user will see all selections populate a list:

## 8 Selected Regions

Montana and North Dakota selections



Rows:

25

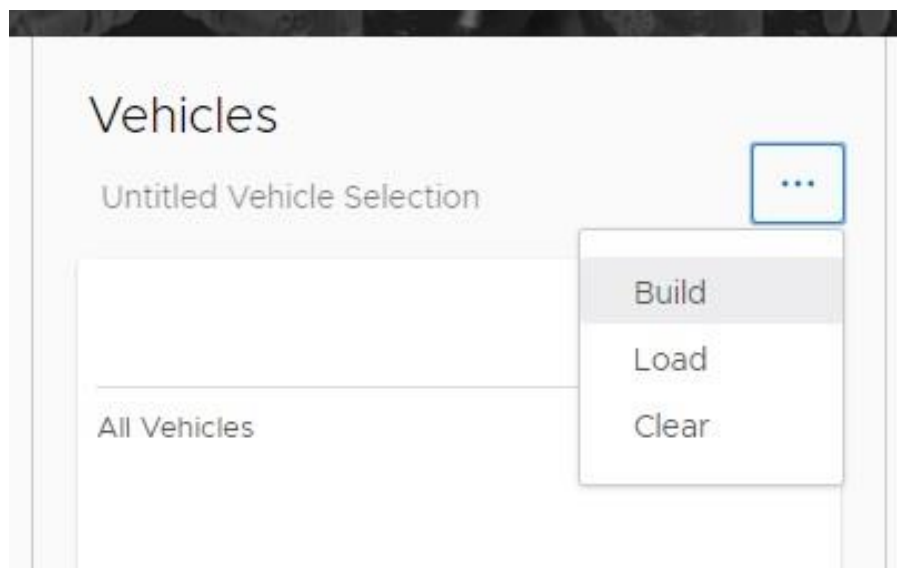
× DELETE

<input type="checkbox"/>	Region ID	Name	State/Province
<input type="checkbox"/>	30083	Richland	Montana
<input type="checkbox"/>	38053	McKenzie	North Dakota
<input type="checkbox"/>	30109	Wibaux	Montana
<input type="checkbox"/>	38033	Golden Valley	North Dakota
<input type="checkbox"/>	38087	Slope	North Dakota
<input type="checkbox"/>	30021	Dawson	Montana
<input type="checkbox"/>	30085	Roosevelt	Montana
<input type="checkbox"/>	38007	Billings	North Dakota

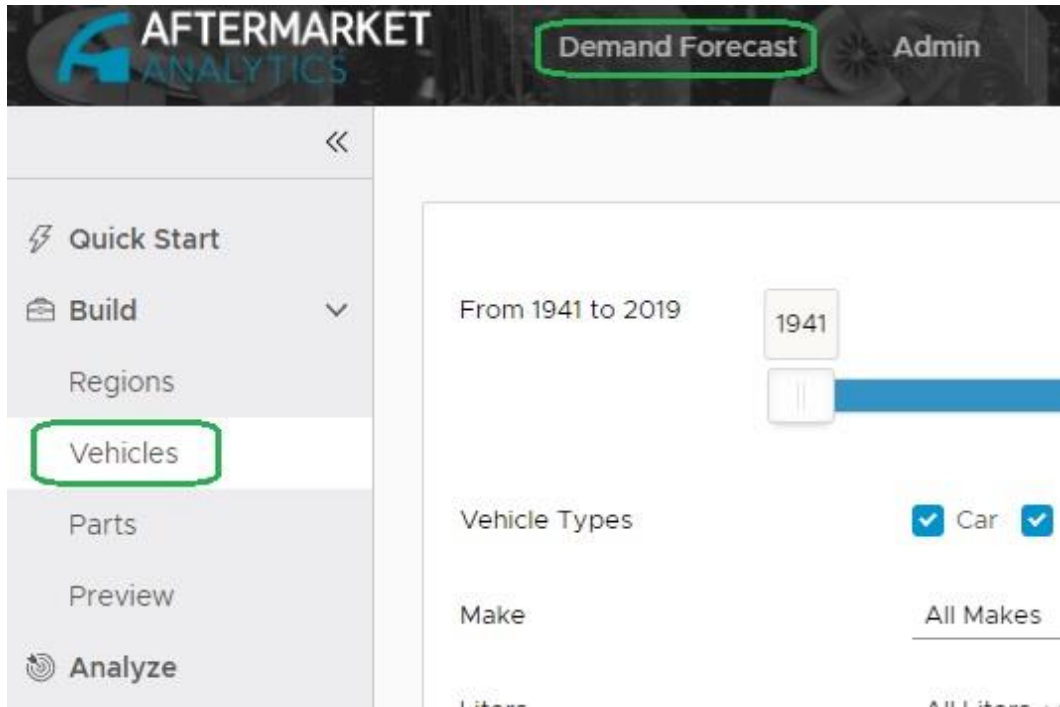
1 - 8 of 8 regions

### Selection Files—Vehicles Selector:

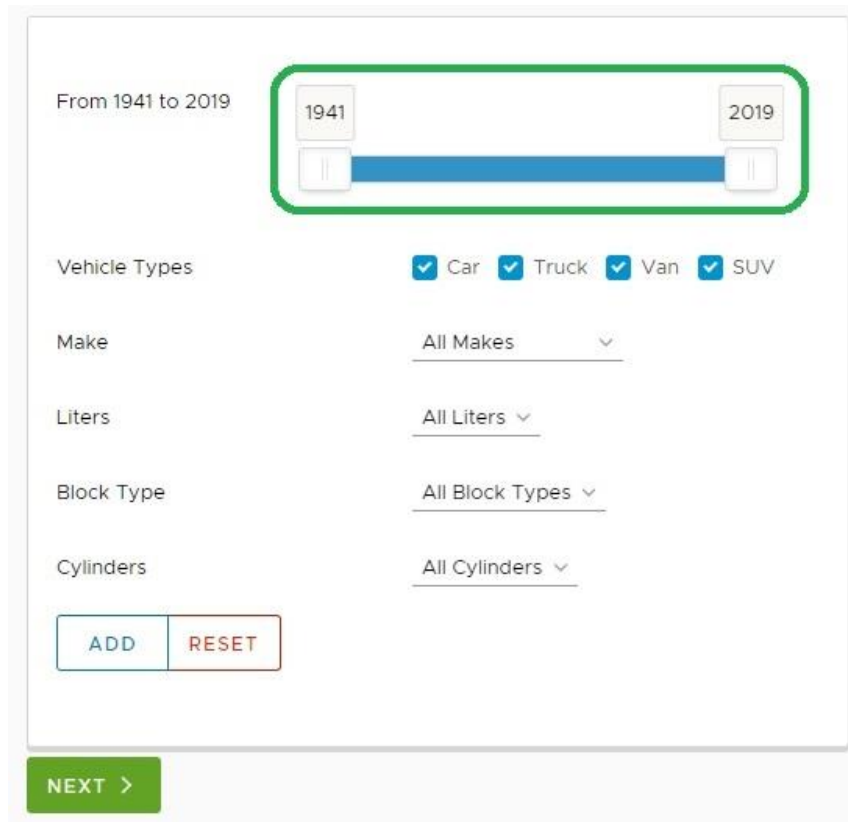
Create a vehicles selection filter in one of two ways. The first way is to go to the more options or ellipsis menu on the home page, and selecting “Build.”



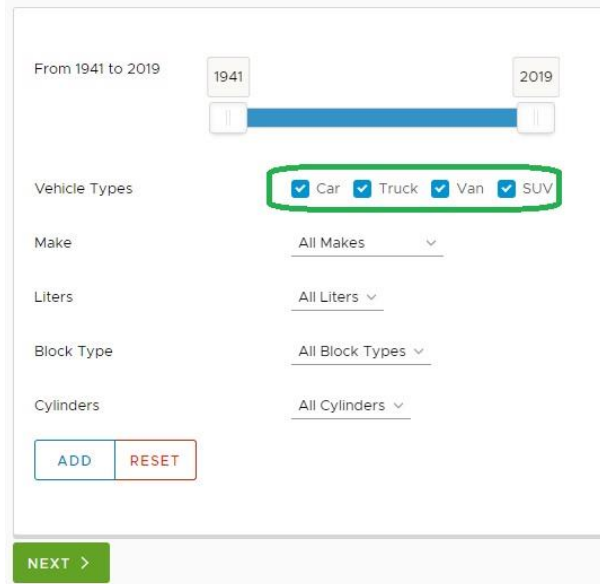
Alternatively, go to Demand Forecast > Build > Vehicles.



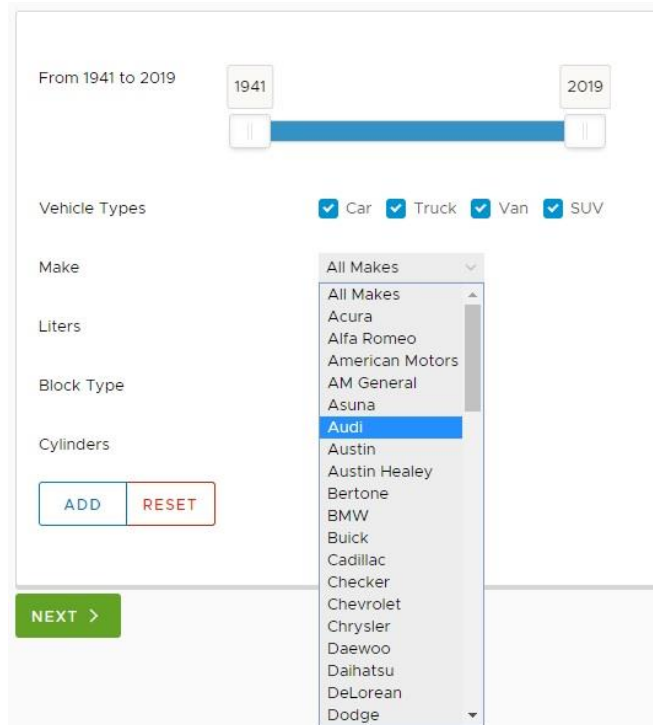
To build a query, first select a desired time frame by using the age range slider:



Select desired "Vehicle Types" by checking or unchecking the checkboxes adjacent to "Car," "Truck," "Van" and/or "SUV."

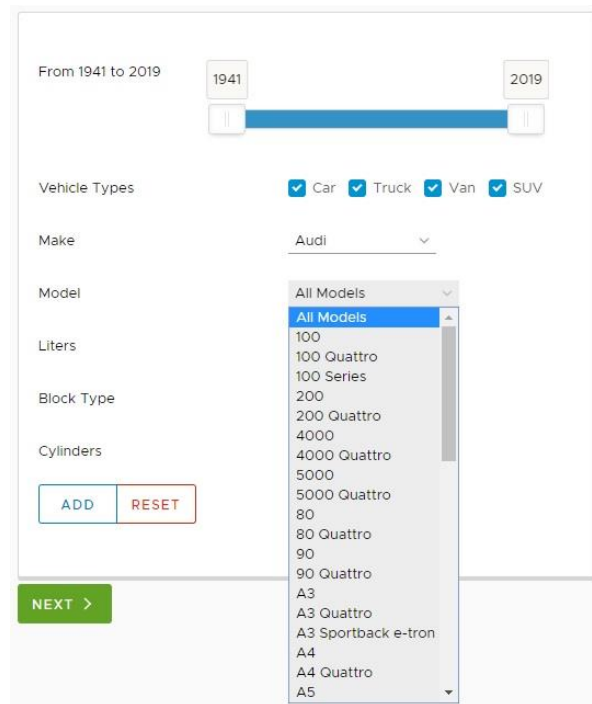


Select desired make from the dropdown labeled "All Makes," or else do not make a selection which will default to "All Makes" in the query.

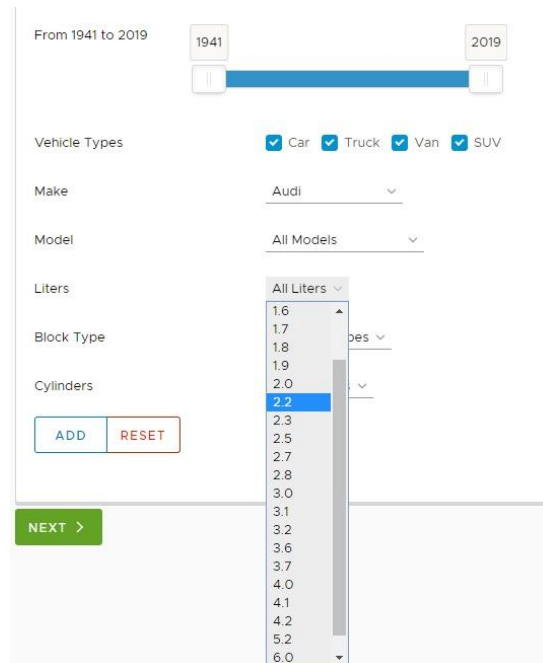




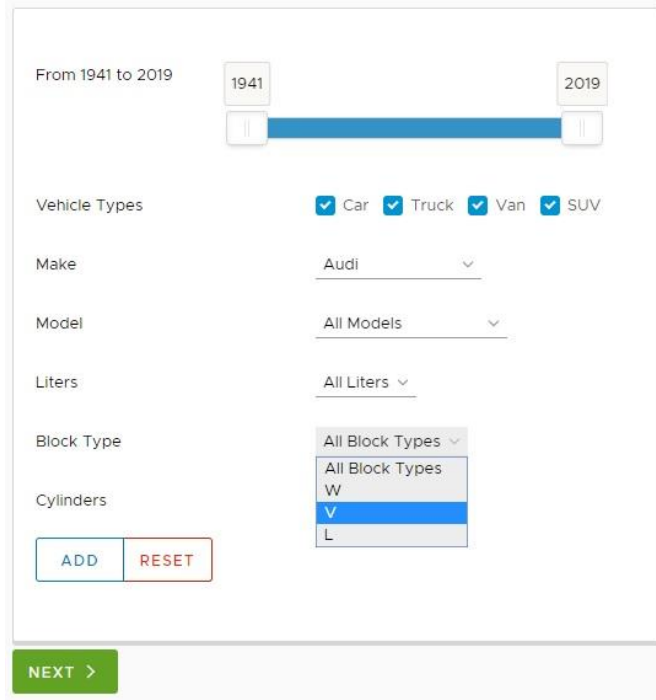
Making a selection (aside from the "All Makes" default) invokes an "All Models" dropdown.



Select engine size from the dropdown labeled "All Liters," or else do not make a selection which will default to "All Liters" in the query.



Next, select block types from the dropdown labeled "All Block Types," or else do not make a selection which will default to "All Block Types" in the query.



From 1941 to 2019

1941 2019

Vehicle Types  Car  Truck  Van  SUV

Make Audi

Model All Models

Liters All Liters

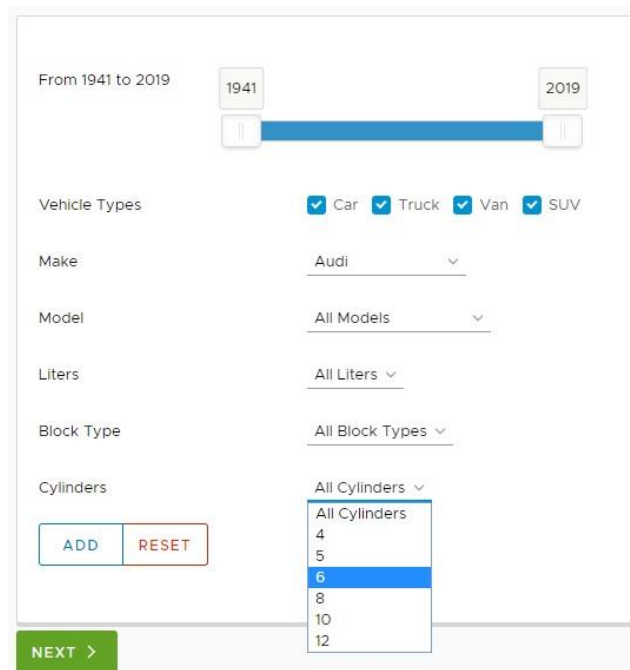
Block Type All Block Types

Cylinders

ADD RESET

NEXT >

Next, select the number of cylinders from the dropdown menu:



From 1941 to 2019

1941 2019

Vehicle Types  Car  Truck  Van  SUV

Make Audi

Model All Models

Liters All Liters

Block Type All Block Types

Cylinders All Cylinders

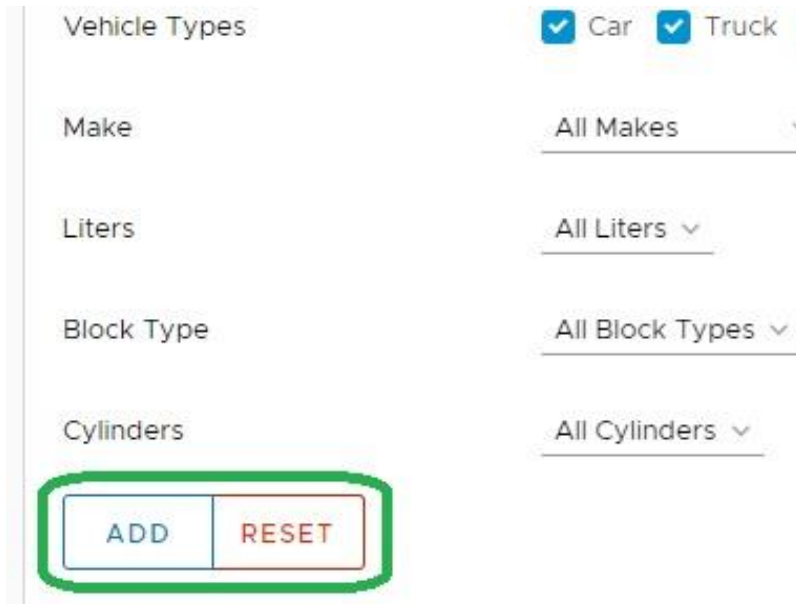
ADD RESET

NEXT >

Note that if user does not specify the number of cylinders, the query defaults to “all cylinders.”

To begin the process of adding selections to the search filter, click the “Add” button.

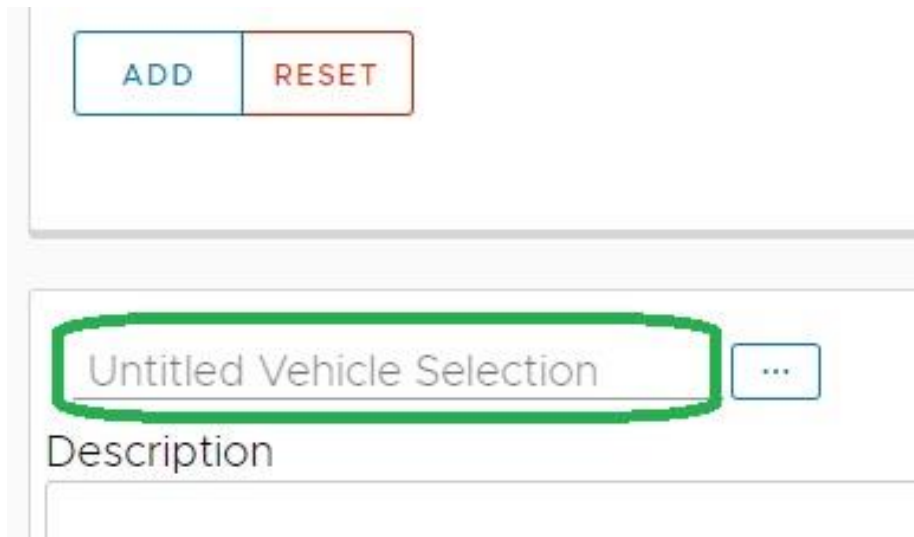
Alternatively, to clear all query parameters, click the “Reset” button.



The screenshot shows a search filter configuration panel with the following elements:

- Vehicle Types:** Two checked checkboxes for "Car" and "Truck".
- Make:** A dropdown menu currently set to "All Makes".
- Liters:** A dropdown menu currently set to "All Liters".
- Block Type:** A dropdown menu currently set to "All Block Types".
- Cylinders:** A dropdown menu currently set to "All Cylinders".
- Buttons:** Two buttons, "ADD" (blue) and "RESET" (red), are located at the bottom of the panel and are highlighted with a green rounded rectangle.

Add the preferred title under which to save your selection filter in the line “Untitled Vehicle Selection”:



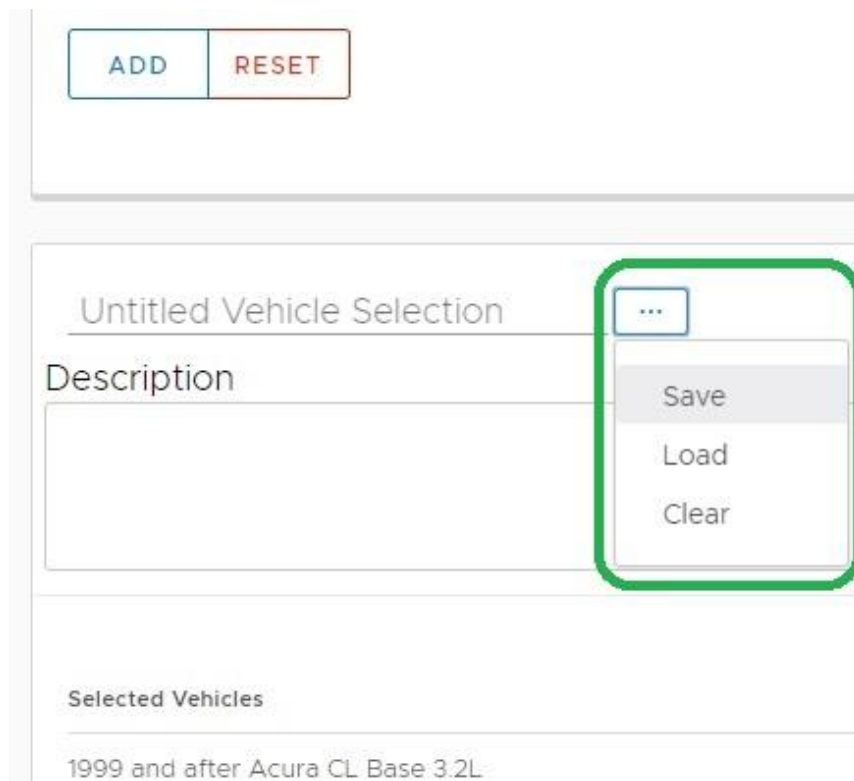
The screenshot shows the input fields for a new filter:

- Buttons:** "ADD" and "RESET" buttons are visible at the top.
- Title Field:** A text input field containing the text "Untitled Vehicle Selection" is highlighted with a green rounded rectangle. To its right is a small square button with three dots.
- Description Field:** A text input field labeled "Description" is located below the title field.

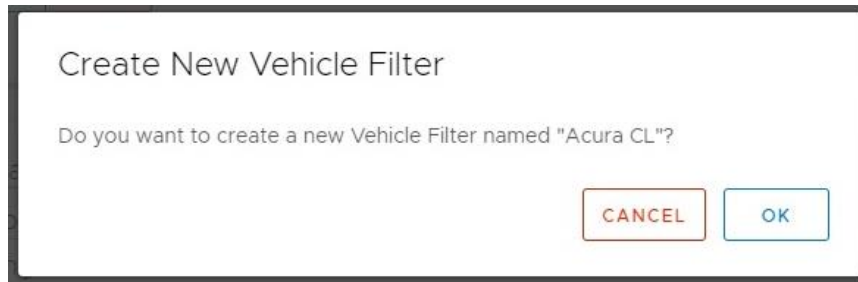
Add a description of the selection filter into the box marked “Description”:



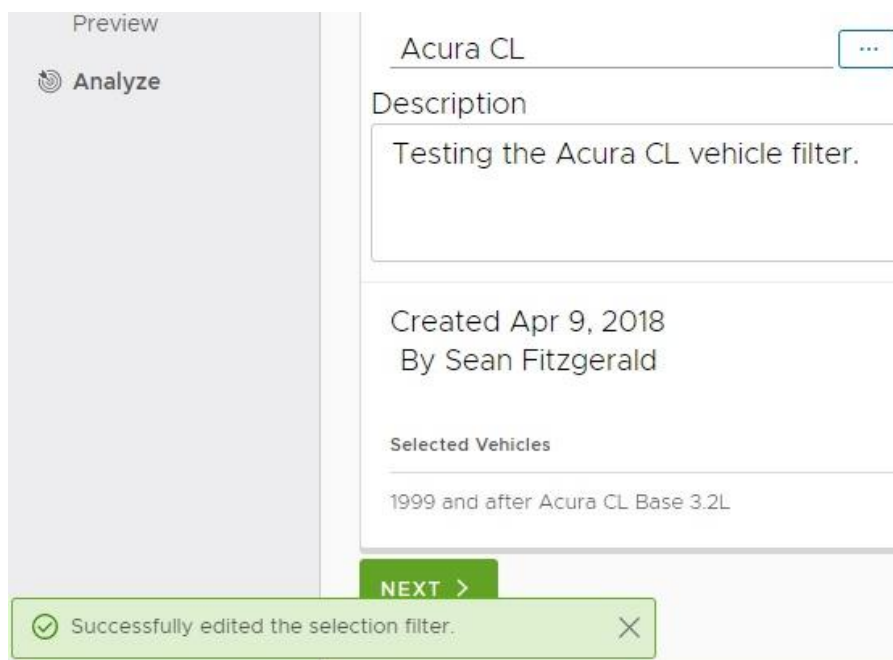
In order to save a selection filter, open the ellipsis menu and select “Save”:



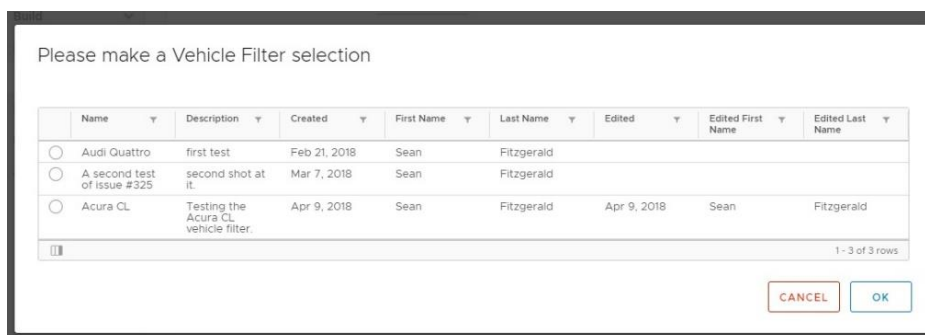
A dialog will appear:



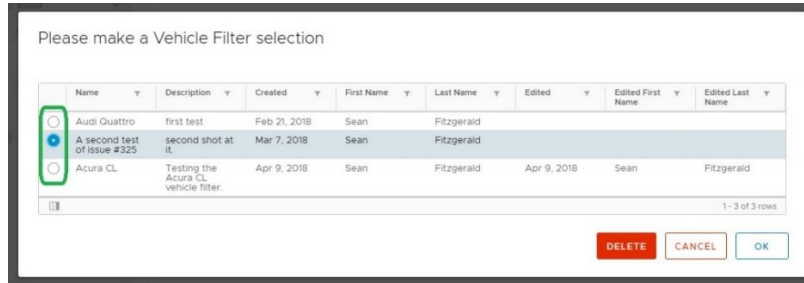
Select "OK" and a message will appear (see below):



In order to open a selection filter, use the ellipsis menu and select "Load." At that point, a dialog ("Please make a Vehicle Filter selection") as follows:

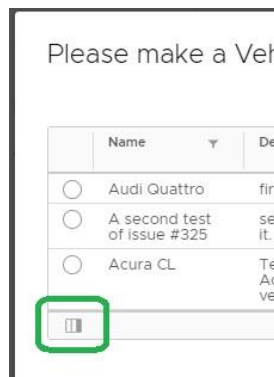


Use the radio buttons to the left of each filter in order to select one of the filters:

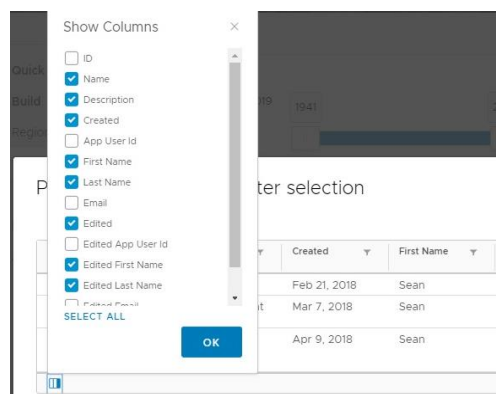


Once user makes the desired selection, user can click the “OK” button. Alternatively, if user wishes to delete a filter, select the “Delete” button.

User may also edit categories by clicking the show/hide columns button:



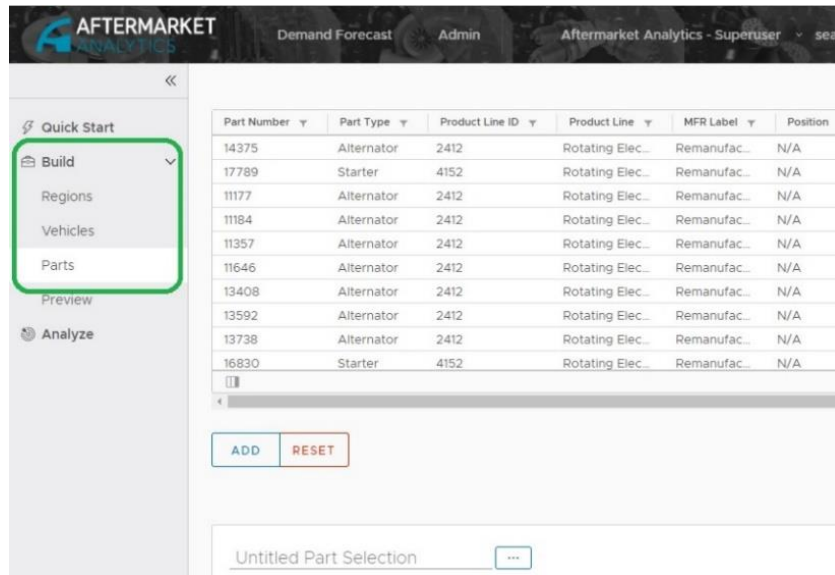
Selecting the button should invoke the following appearance:



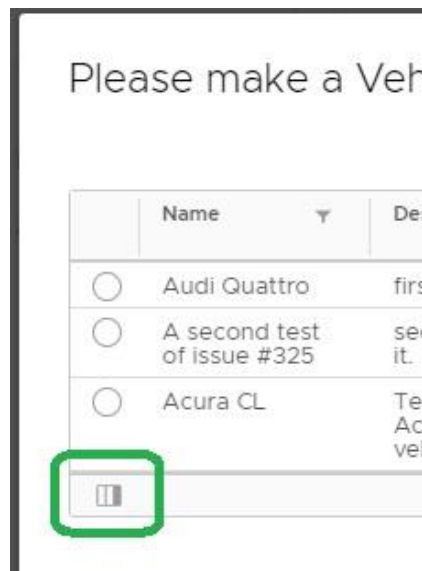
Add or subtract displayed columns by checking or unchecking (respectively) the checkboxes adjacent to property in question.

### Selection Files—Parts Selector:

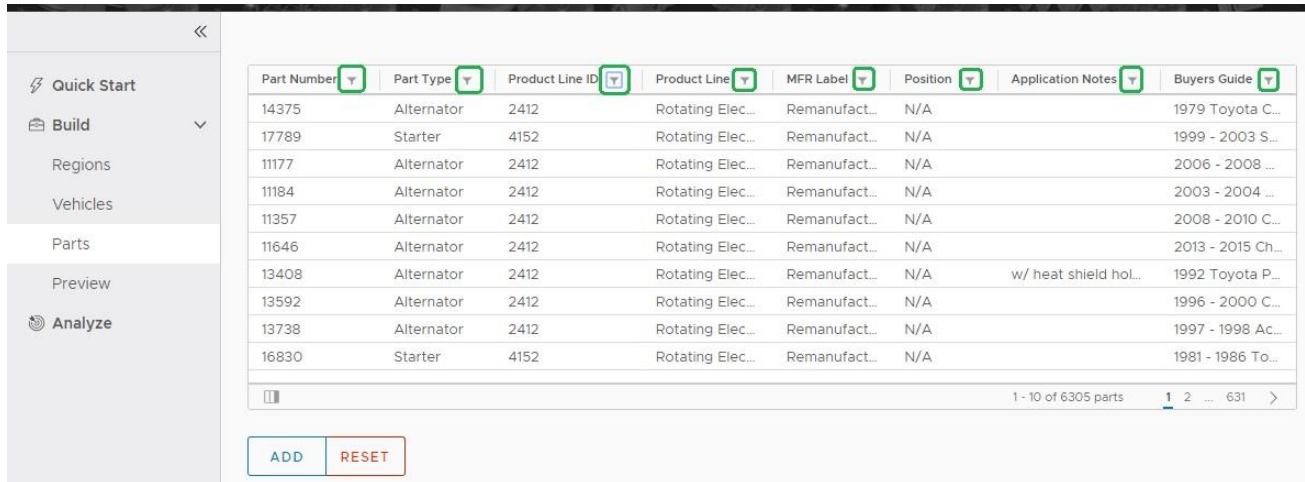
Create a selection filter specific to parts by using the Parts Selector:



Modify which columns appear with the show/hide columns button:



Small funnel icons (see highlighted symbols below) appear to the right of each search parameter:

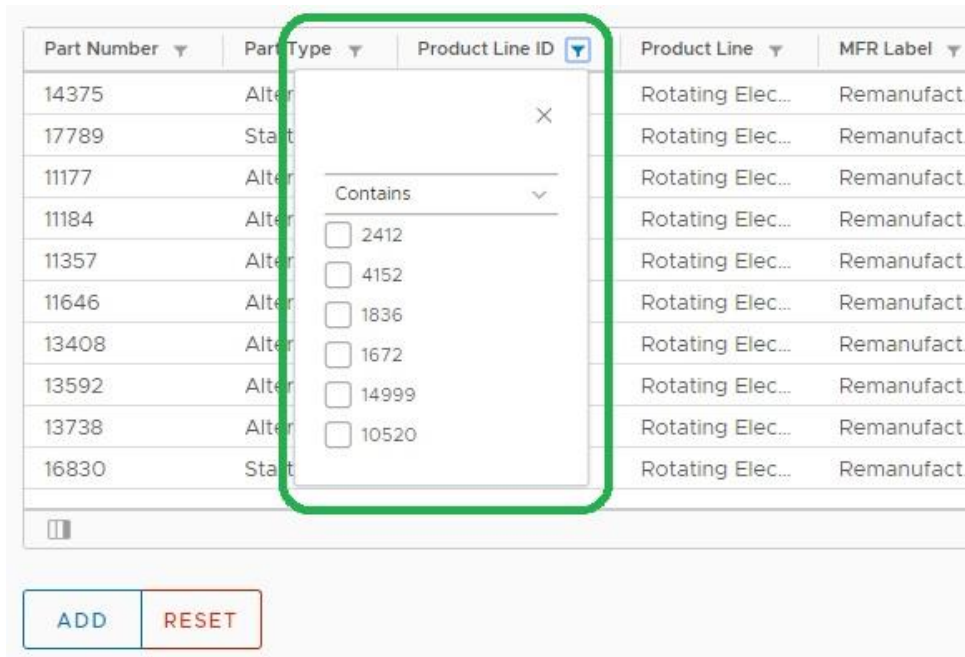


Part Number	Part Type	Product Line ID	Product Line	MFR Label	Position	Application Notes	Buyers Guide
14375	Alternator	2412	Rotating Elec...	Remanufact...	N/A		1979 Toyota C...
17789	Starter	4152	Rotating Elec...	Remanufact...	N/A		1999 - 2003 S...
11177	Alternator	2412	Rotating Elec...	Remanufact...	N/A		2006 - 2008 ...
11184	Alternator	2412	Rotating Elec...	Remanufact...	N/A		2003 - 2004 ...
11357	Alternator	2412	Rotating Elec...	Remanufact...	N/A		2008 - 2010 C...
11646	Alternator	2412	Rotating Elec...	Remanufact...	N/A		2013 - 2015 Ch...
13408	Alternator	2412	Rotating Elec...	Remanufact...	N/A	w/ heat shield hol...	1992 Toyota P...
13592	Alternator	2412	Rotating Elec...	Remanufact...	N/A		1996 - 2000 C...
13738	Alternator	2412	Rotating Elec...	Remanufact...	N/A		1997 - 1998 Ac...
16830	Starter	4152	Rotating Elec...	Remanufact...	N/A		1981 - 1986 To...

1 - 10 of 6305 parts 1 2 ... 631 >

ADD RESET

Select the funnel icon in order to filter by certain terms:



Part Number	Part Type	Product Line ID	Product Line	MFR Label
14375	Alter		Rotating Elec...	Remanufact...
17789	Start		Rotating Elec...	Remanufact...
11177	Alter		Rotating Elec...	Remanufact...
11184	Alter		Rotating Elec...	Remanufact...
11357	Alter		Rotating Elec...	Remanufact...
11646	Alter		Rotating Elec...	Remanufact...
13408	Alter		Rotating Elec...	Remanufact...
13592	Alter		Rotating Elec...	Remanufact...
13738	Alter		Rotating Elec...	Remanufact...
16830	Start		Rotating Elec...	Remanufact...

Contains

- 2412
- 4152
- 1836
- 1672
- 14999
- 10520

ADD RESET

Use one of two methods of selecting desired term(s) by which to filter searches. One is to type the desired search term into the provided entry line:



Part Number	Part Type	Product Line ID	Product Line	MFR Label	Position	Application
14375	Alternator			Remanufact...	N/A	
11177	Alternator			Remanufact...	N/A	
11184	Alternator			Remanufact...	N/A	
11357	Alternator			Remanufact...	N/A	
11646	Alternator			Remanufact...	N/A	
13408	Alternator			Remanufact...	N/A	w/ heat
13592	Alternator			Remanufact...	N/A	
13738	Alternator	2412	Rotating Elec...	Remanufact...	N/A	
10100	Alternator	2412	Rotating Elec...	Remanufact...	N/A	
10101	Alternator	2412	Rotating Elec...	Remanufact...	N/A	Primary

- Contains
- Rotating Electrical
- Brake Master Cylinders
- Hub Assemblies and Bearings

ADD RESET

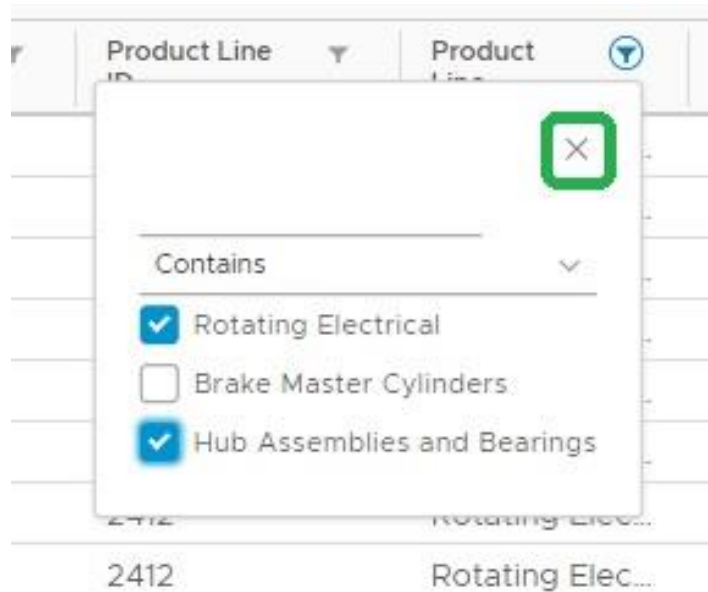
The second method is to place a checkmark adjacent to the desired search term:

Part Number	Part Type	Product Line ID	Product Line	MFR Label	Position
14375	Alternator			Remanufac...	N/A
17789	Starter			Remanufac...	N/A
11177	Alternator			Remanufac...	N/A
11184	Alternator			Remanufac...	N/A
11357	Alternator			Remanufac...	N/A
11646	Alternator			Remanufac...	N/A
13408	Alternator			Remanufac...	N/A
13592	Alternator	2412	Rotating Elec...	Remanufac...	N/A
13738	Alternator	2412	Rotating Elec...	Remanufac...	N/A

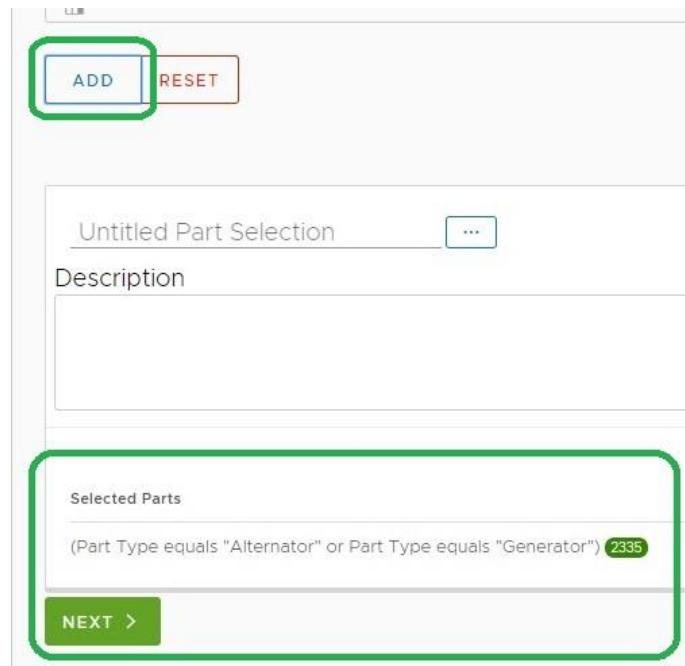
- Contains
- Rotating Electrical
- Brake Master Cylinders
- Hub Assemblies and Bearings

ADD RESET

Having made desired selection, click the “x” in the upper right (see below) in order to close the filter window.



Make selections from the displayed list and click the “Add” button by adding the displayed items to the overall query:



Click “Next” button to go to the “Preview” page:

Regions: Untitled Region Selection

County Name	State
Costilla	Colorado
Eagle	Colorado
Fremont	Colorado
Hinsdale	Colorado
Jackson	Colorado
La Plata	Colorado
Ouray	Colorado
San Juan	Colorado
Boulder	Colorado
Chaffee	Colorado
Denver	Colorado
Gunnison	Colorado
Huerfano	Colorado
Lake	Colorado
Larimer	Colorado
Montezuma	Colorado

Vehicles: Untitled Vehicle Selection

Parts: Untitled Part Selection

(Part Type equals "Starter") 1388

Estimated query time is less than 15 seconds [▶ RUN DEMAND ESTIMATE](#)

Click the "Run Demand Estimate" button to get a display similar to the following:

DOWNLOAD

Part Number	Part Type	Product Line ID	Product Line	MFR Label	Pos
12172	Starter	4152	Rotating ...	Remanufactured	N/
12382	Starter	4152	Rotating ...	Remanufactured	N/
12383	Starter	4152	Rotating ...	Remanufactured	N/
17728	Starter	4152	Rotating ...	Remanufactured	N/
17729	Starter	4152	Rotating ...	Remanufactured	N/
17899	Starter	4152	Rotating ...	Remanufactured	N/

Vehicle Type: Car

Plot Type: VIO Scatter Plot

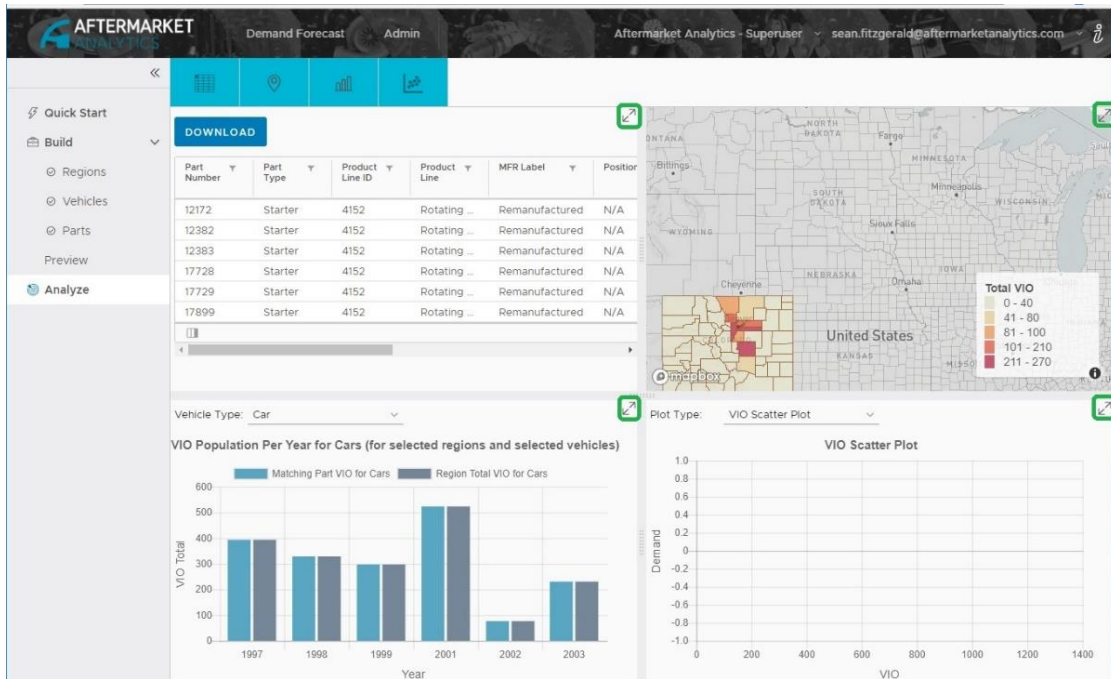
VIO Population Per Year for Cars (for selected regions and selected vehicles)

Year	Matching Part VIO for Cars	Region Total VIO for Cars
1997	400	400
1998	300	300
1999	300	300
2001	500	500
2002	100	100
2003	200	200

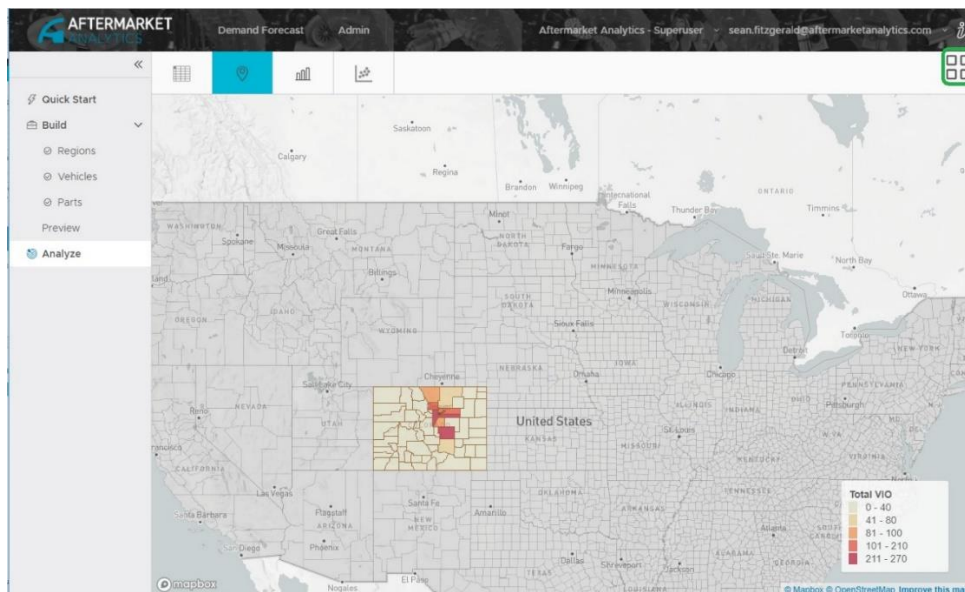
VIO Scatter Plot

Demand vs VIO

In order to view any of the above four windows in a singular fashion click the appropriate expand buttons:

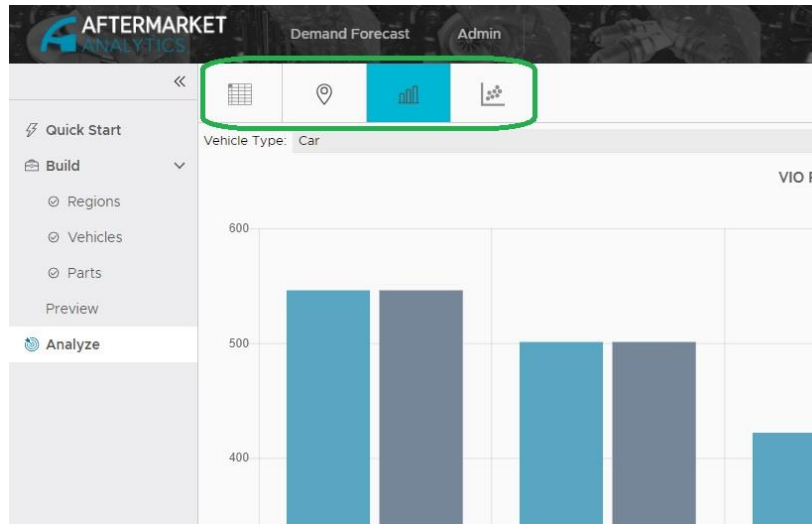


Clicking the expand button on, for example, the regions map, will create a screen similar to the one which follows:



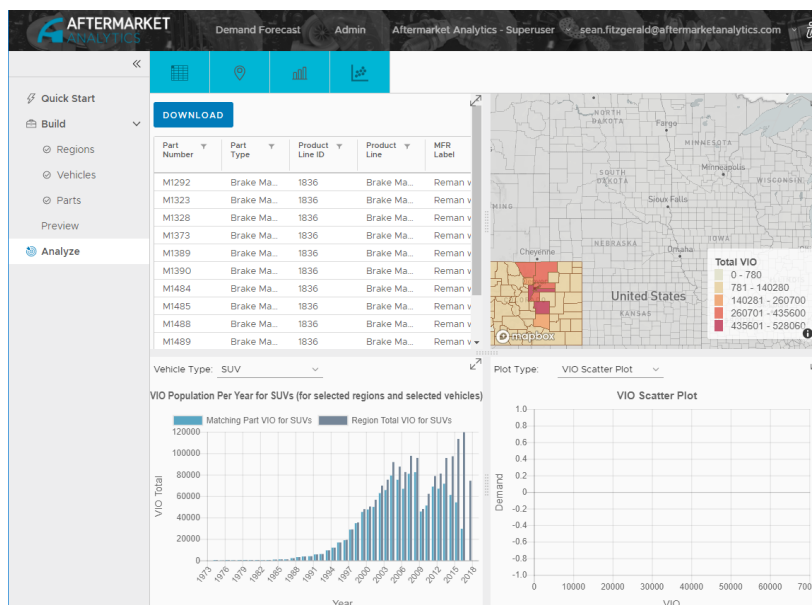
Note the highlighted foursquare view button in the top right of the above picture. Select that button in order to re-create the foursquare view.

Toggle through the various expanded views using the view buttons at the top of the display, as shown in the following:



Demand Estimate Results:

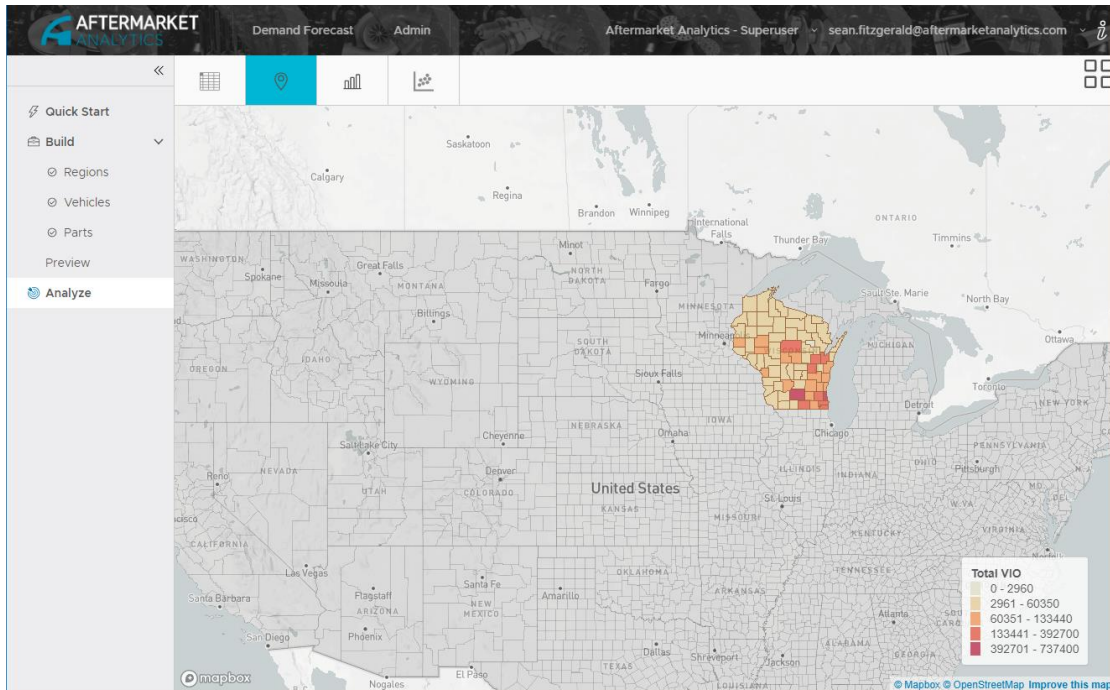
The four types of display are: (1) Table, (2) Map, (3) Histogram and (4) Scatter Plot. The four-square appearance should appear similar to the following:



View the full screen version of each as follows, firstly the table of results:

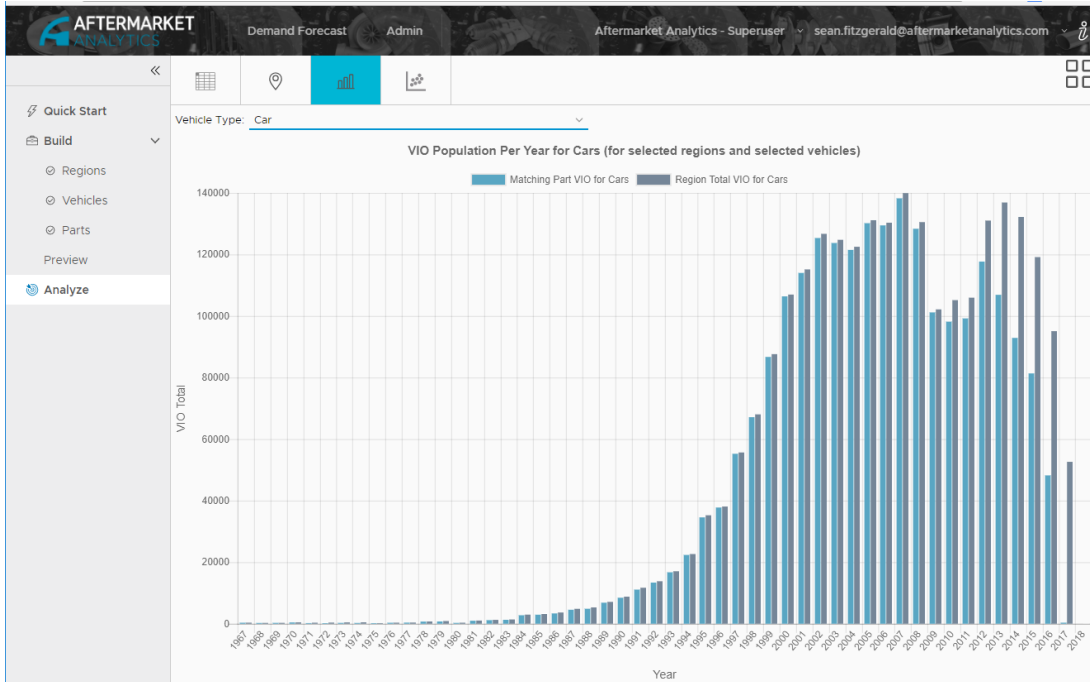
Part Number	Part Type	Product Line ID	Product Line	MFR Label	Position	Application Notes	Buyers Guide	Avg Vehicle Age	VIO Sum	Demand
M1292	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	w/Dual Cha...	1970 - 1975 ...	42.89	30	
M1323	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	Reservoir In...	1967 - 1970 ...	49.5	67	
M1328	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	w/Bendix U...	1967 - 1970 ...	49.93	217	
M1372	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	Reservoir In...	1969 Chev...	49.48	114	
M1373	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	PowerBrake...	1968 - 1974 ...	48.29	27	
M1378	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	Reservoir In...	1967 - 1972 ...	50.96	184	
M1390	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	Reservoir In...	1968 - 1975 ...	44.29	12	
M1394	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	Reservoir In...	1968 - 1969 ...	49.94	37	
M1398	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	ManualBrak...	1968 - 1970 ...	48.98	59	
M1404	Brake Ma...	1836	Brake Ma...	Reman wi...	N/A	Reservoir In...	1970 Plymo...	49.29	8	

The regions results (here with the state of Wisconsin selected):



The histogram displays as follows:





The scatter plot will display similarly to the following, depending upon Plot Type selected:

