ORDER POWER!

Work Orders

User Guide
Release 4.0.3

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Since 1978

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Work Orders

The ***ORDER POWER!*** **Work Order** system supports the manufacturing of **Items** which you identify as "Manufactured" using the **Manufactured** field in Item Maintenance. This field is set to "M" for Make-to-Order, or "S" for Make-to-Stock.

You predefine **Bills of Materials, Work Centers,** and **Routings** from the *Work with Files menu*, and then create **Work Orders** from the *Work Orders menu*. ***ORDER POWER!*** will automatically create **Work Orders** for **Make-to-Order** items based on existing customer orders. For **Make-to-Stock Items**, you manually create **Work Orders** based on your expected demand.

Make-to-order vs. Make-to-Stock

A **Make-to-Order Item** is an item which is customized or normally not stocked, which you manufacture to the requirements of a customer's order. A **Make-to-Stock Item** is marketable to many customers, and probably made in advance of expected orders.

WIP Tracking

Component Items are moved from inventory into a **Work In Process (WIP) Location** in the production warehouse. Each WIP movement can be tracked by from-location, time, and the person who moved the items.

Integration With Inventory Warehouse Management

You issue components of **Manufactured Items** to specific **Work Orders** by transferring them from warehouse bins to a Work in Process location. The manufactured parent is subsequently moved back from Work in Process to any **Warehouse** location.

Comprehensive Reporting

A collection of reports and inquiries can be used to extract information quickly.

More about Work Orders

- Component substitutions are allowed.
- Component materials for **Manufactured Items** are identified with pick lists.
- Backflushing of all or some component materials can be done for shop orders on an order by order, component by component basis.
- The costs of materials used, plus optional standard overhead costs, are the factors used in calculating the cost of the manufactured Parent item.
- Shop orders are tracked using routings, operations and work centers.

Setting up *ORDER POWER!* for Work Orders

Here is a checklist of things you will need to set up to use **Work Orders**:

- ❑ **Company Profile** ..... *see below*
- ❑ **Work Order support master files** ..... *see page 4*
  - ❑ **Work Order Work Centers** ..... *see page 5*
  - ❑ **Work Order Routing Codes** ..... *see page 7*
  - ❑ **Work Order Comment Codes** (optional)..... *see page 10*
- ❑ **Set up GL for Work Orders**..... *see page 15*
  - ❑ **Manufacturing Cost Types** (optional)..... *see page 16*
  - ❑ **GL Manufacturing Classes** (optional) ..... *see page 17*
- ❑ **Items**..... *see page 19*
  - ❑ **Item master set up** ..... *see page 19*
  - ❑ **Bill of Materials** ..... *see page 20*
  - ❑ **Warehouse Location**..... *see page 23*
  - ❑ **Setting up Manufacturing Cost** (optional) ..... *see page 24*

Company Profile options for Work Orders

The information you enter in the **Company Profile** customizes ***ORDER POWER!*** to meet your company's unique business requirements.

To set up Company Profile options for Work Orders

1. From the ***ORDER POWER!*** *Main Menu*, select: **Work with Files ➔Company Profile ➔F15 (Maintenance) ➔ Work Orders** to display *Company Profile Update Panel 19 (figure 1)*.

```
Company # 001          OP! 4.0 DEVELOPMENT ** CO# 001            Panel 19
                              Profile Update

 Next Work Order Number          106     Update Sched Ship Date     N Y/N
 Next Work Order Batch           102     Account for Scrap          I I/W
 Add On Days to Complete        1.00           (Inventory or Write Off)
 Make to order defaults to ship complete  Y  Y/N
 Issue components by      2    1=Batch#  2=WO#  3=Ord#

       - - - - - - - - - - - - - Info Fields - - - - - - - - - - - -
 Routing Header:          Mandatory      Work Order Transaction:  Mandatory
  1 ..... RHINFO1    N Y/N        1 ..... WTINFO1    N Y/N
  2 ..... RHINFO2    N Y/N        2 ..... WTINFO2    N Y/N
  3 ..... RHINFO3    N Y/N        3 ..... WTINFO3    N Y/N
 Routing Step:          Mandatory
  1 ..... RDINFO1    N Y/N
  2 ..... RDINFO2    N Y/N
  3 ..... RDINFO3    N Y/N
 Work Center Master:      Mandatory      Bill Of Materials:       Mandatory
  1 ..... INFO1      N Y/N        1 ..... BMINFO1    N Y/N
  2 ..... INFO2      N Y/N        2 ..... BMINFO2    N Y/N
  3 ..... INFO3      N Y/N        3 ..... BMINFO3    N Y/N
 F1=Help  F3=Exit  F12=Cancel
```

Company Profile Update Panel 19 (figure 1)

2. Complete the following fields:

Next Work Order Number

Type a number to specify the next **Work Order** number you want ***ORDER POWER!*** to create. This will be automatically incremented every time a work order is created.

Update Sched Ship Date

Type **Y**(es) or **N**(o) to indicate whether or not you want the estimated completion date of **Make-to-Order Work Orders** to be used as the scheduled shipment date on associated customer orders. If you want, you can have the system add safety days to that scheduled shipment date using the **Add On Days to Complete** field on this panel.

Next Work Order Batch

Type the next **Work Order** batch number you want ***ORDER POWER!*** to create. Make-to-Order **Work Orders**, based on customer orders, are created in numbered batches. This will be automatically incremented every time a work order batch is created.

Account for Scrap

If **scrap** is typically produced in the manufacture of an item, you may factor that scrap into the item's **Bill of Materials** quantities, so that sufficient **Component Items** will be issued to complete the finished product. Upon completion of the Work Order, on the *Record Finished Goods Entry panel (figure 36)* you may designate that the excess material was scrapped, or that it is being returned to regular inventory. Scrapped or wasted material affects the cost of the manufactured parent item.

Type **I**(nventory) or **W**(riteoff) to indicate which option you want to use as a default when designating the disposition of excess material on *Record Finished Goods Entry panel (figure 36)*. This default may be overridden for any component in any work order.

Add On Days to Complete

If you have typed **Y**(es) in the **Update Sched Ship Date** field above, type the number of days you want to add to the **Work Order**'s estimated completion date when ***ORDER POWER!*** updates the scheduled shipment date on customer orders.

Make to order defaults to ship complete

Type **Y**(es) or **N**(o) to indicate whether or not you want **Order Entry** to default to **Ship Complete** on order lines where there is a **Make-to-order item** and quantity greater than one. This will prevent partial quantities from shipping before the work order is completed.

Issue components by

Type a code to indicate which field you want to be the cursor's default position on *Issue Components Select panel (figure 30)* for issuing components.

1 Batch Number

2 Work Order
3 Customer Order

Info Fields

These user-definable fields display on the panels indicated, and can be used to collect miscellaneous information about each **Work Order**. These **Info Fields** appear on the following panels:

Routing Header	*see Routing Code Update panel (figure 7)*
Work Order Transaction	*Future enhancement*
Routing Step	*Routing Step Update panel (figure 10)*
Work Center Master	*Future enhancement*
Bill Of Materials	*Future enhancement*

Mandatory

Type **Y**(es) or **N**(o) to indicate whether the user is required to fill the respective **Info Field** during data entry.

3. Press **Enter** to update the **Company Profile**.

Working with the Work Order support master files

The **Work Order** system relies on several files that you should set up in advance.

Work Centers *see page 5*

The manufacturing area can be divided into physical or logical **Work Centers** which can be used in the routing process. A routing defines a series of work centers in which the product is manufactured.

Work Order Routing Codes *see page 7*

A **Routing** code describes the manufacturing process. It can be created with an unlimited number of steps. Each step usually represents movement through a work center.

Work Order Comment Codes *see page 12*

A **Work Order Comment code** may be assigned to a line of notes related to a **Work Order** to specify whether or not you want the notes to print on **Work Orders** and/or **Work Order Pick Tickets**.

Manufacturing Cost Types *see page 16*

Up to 24 standard cost components, such as direct labor, indirect labor, fixed overhead, variable overhead, depreciation, allocated rent, etc. may be defined. Then for each manufactured item, the standard cost amount for each of these cost types may be specified. Those costs are added to the cost of the parent item as the work order is completed.

GL Manufacturing Classes *see page 16*

The 24 **Manufacturing Cost Types** (above) can each have a General Ledger expense account associated with them in a **GL Manufacturing Class**. An unlimited number of GL Manufacturing Classes can be created, which are then assigned to items or groups of items. This allows the same overhead

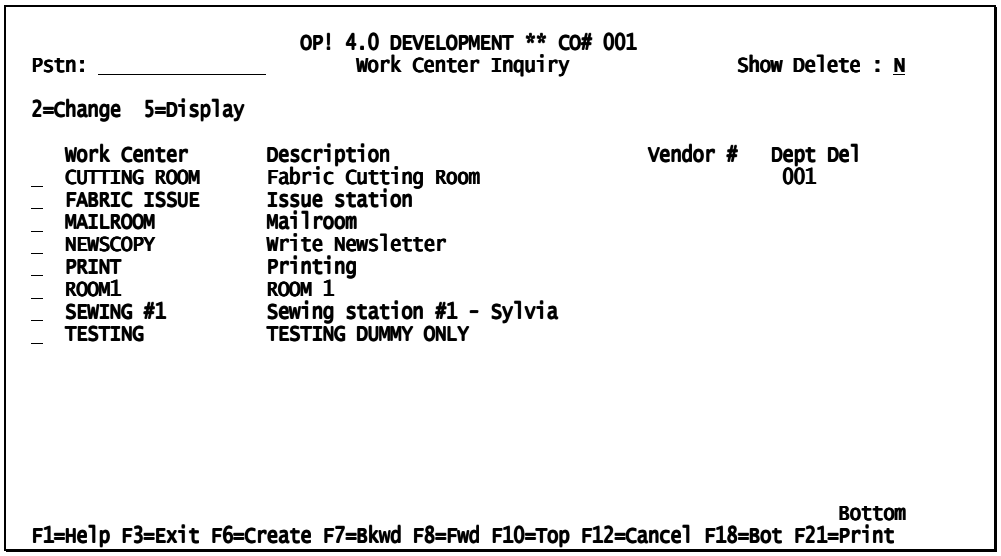
costs for different items to be booked to different GL accounts.

Working with Work Centers

The manufacturing area can be divided into physical or logical **Work Centers**. A **Work Center** can consist of a machine, a process, people, or combinations of the above. A Work center may be optionally identified as belonging to a GL department. This has no effect on accounting, it is for reference only.

To work with Work Centers

1. From the ***ORDER POWER!*** *Main Menu*, select: **Work with Files ö Work Order Work Centers** ö to display the *Work Center Inquiry panel (figure 2)*.



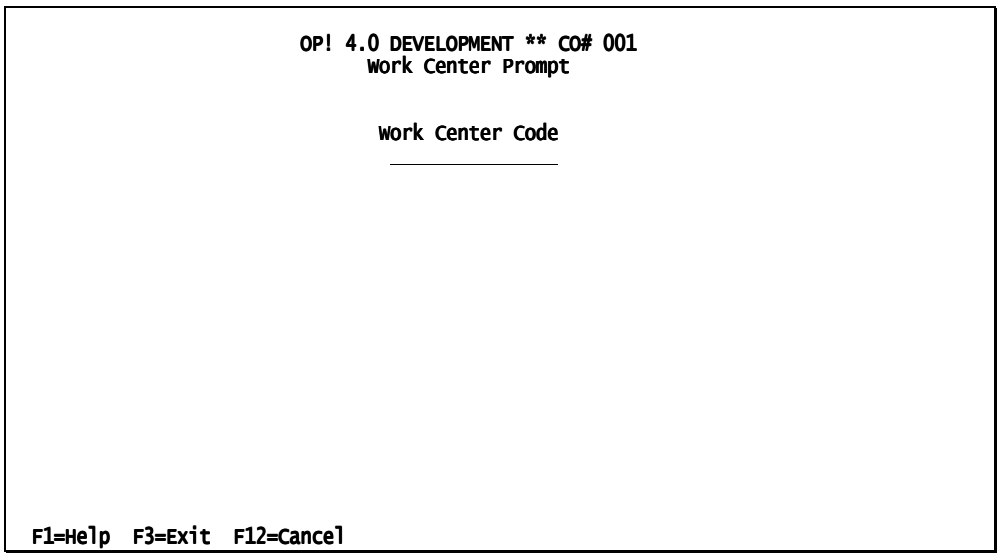
Work Center Inquiry panel (figure 2)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Work Center Update panel (figure 4)* to work with an existing **Work Center**
5=Display	Display the *Work Center Display window* similar to *Work Center Update panel (figure 4)* to view a **Work Center**'s set up
F6=Create	Display the *Work Center Prompt panel (figure 3)* to create a new **Work Center**

To create a new Work Center

1. On the *Work Center Inquiry panel (figure 2)*, press **F6** (Create) to display the ***Work Order Document*** Prompt panel (figure 52).



Work Center Prompt panel (figure 3)

1a. Complete this field:

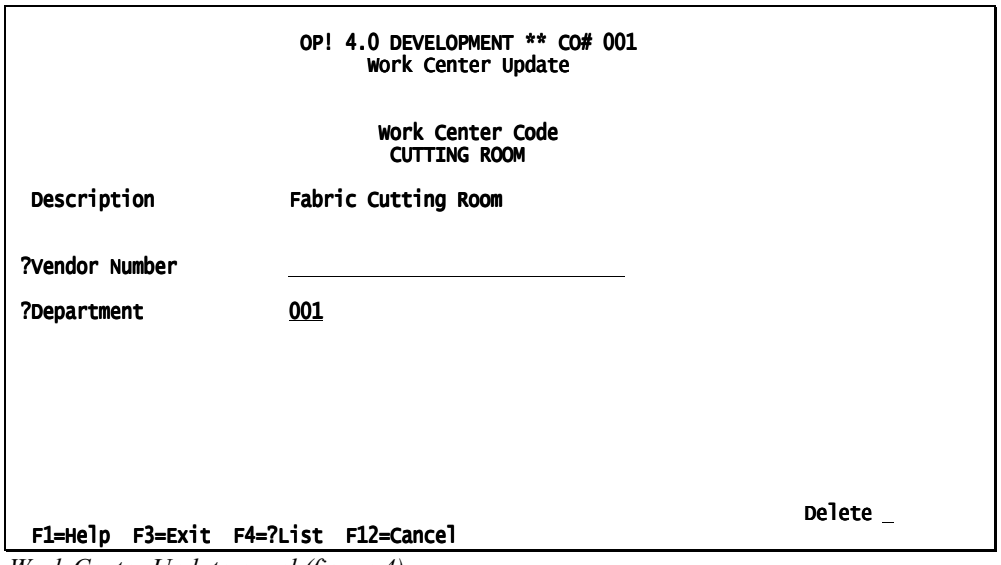
Work Center Code

Type the name by which you want to identify a logical **Work Center** which can be used in the routing process.

1b. Press **Enter** to display the *Work Center Update panel (figure 4)*.

To change a Work Center

1. On the *Work Center Inquiry panel (figure 2)*, type **2** (Change), beside the **Work Center** you want to work with, then press **Enter** to display the *Work Center Update panel (figure 4)*.



Work Center Update panel (figure 4)

2. Complete these fields:

Description

Type a description of the **Work Center** you are defining.

Vendor Number

If the work center is at a vendor's site, you may enter the Vendor Number here. This is for reference only.

Department

Type a **GL Department** code that you relate to the **Work Center**. This is for reference only, and has no General Ledger effect

3. Press **Enter** to update the **Work Center**.

To display a Work Center

On the *Work Center Inquiry panel (figure 2)*, type **5** (Display) beside the **Work Center** you want to see, then press **Enter** to display the *Work Center Display window* similar to ***Work Order Document Update*** panel (figure 53).

Working with Routing Codes

A **Routing** code is a user-defined code that describes the manufacturing process. It can be created with up to 999 **Routing** steps. Each step represents the **Work Center** where the work will be done. ***ORDER POWER!*** supports a default routing code for each manufactured item, as well as an unlimited number of alternate routings which may be assigned to any specific work order. Multiple items may share the same routing code.

To work with Routing Codes

1. From the ***ORDER POWER!*** *Main Menu*, select: **Work with Files ö Work Order Routing Codes** ö to display the *Routing Header Master Inquiry panel (figure 5)*.

```
                        OP! 4.0 DEVELOPMENT ** CO# 001
Pstn: _________         Routing Header Master Inquiry          Show Delete : N

2=Change  5=Display  6=Routing Steps  7=Notes
                                                          Days to
       Routing Code   Description                        Complete   Del
_      BELL1          Bell Collection                       .50
_      FLAG/2PART     Flags with 2part assembly            2.50
_      PARENT 1       Routing code for Parent1           999.00
_      NEWS           Newsletter Production                3.00

                                                                    Bottom
F1=Hlp F3=Ext F6=Crt F7=Bkwd F8=Fwd F10=Top F12=Cxl F18=Bot F21=Prt
```

Routing Header Master Inquiry panel (figure 5)

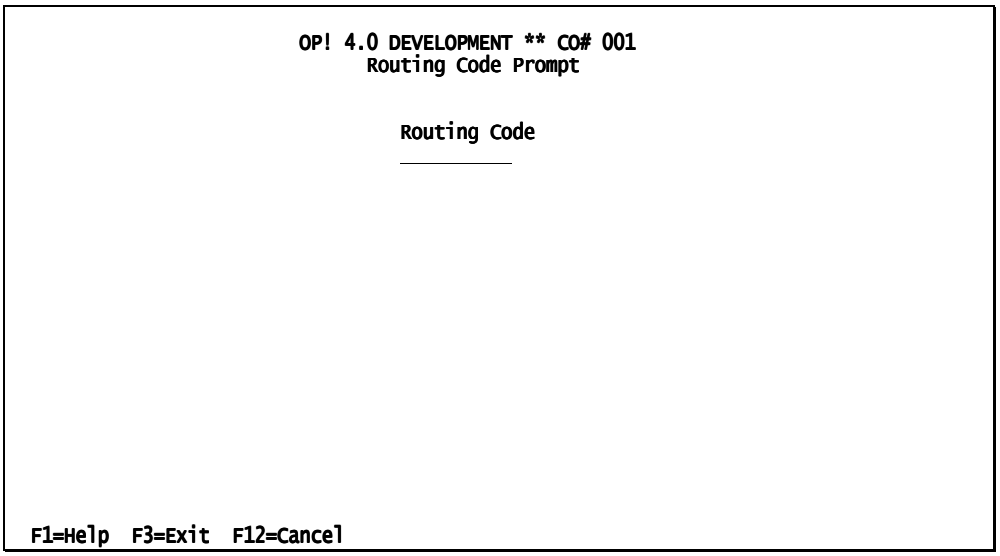
These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Routing Code Update panel (figure 7)* to work with an existing **Routing** code
5=Display	Display the *Routing Header Display window* similar to *Routing Code Update panel (figure 7) to view a* **Routing** code

Action	Description
6=Routing Steps	Display the *Routing Master Detail Inquiry panel (figure 8)* to view the steps in a **Routing** code
7=Notes	Display the *Routing Header Notes window (figure 63)* to view **Routing Notes**
F6=Create	Display the *Routing Code Prompt panel (figure 6)* to create a new **Routing** code

To create a new Routing code

1. On the *Routing Header Master Inquiry panel (figure 5)*, press **F6** (Create) to display the *Routing Code Prompt panel (figure 6)*.



Routing Code Prompt panel (figure 6)

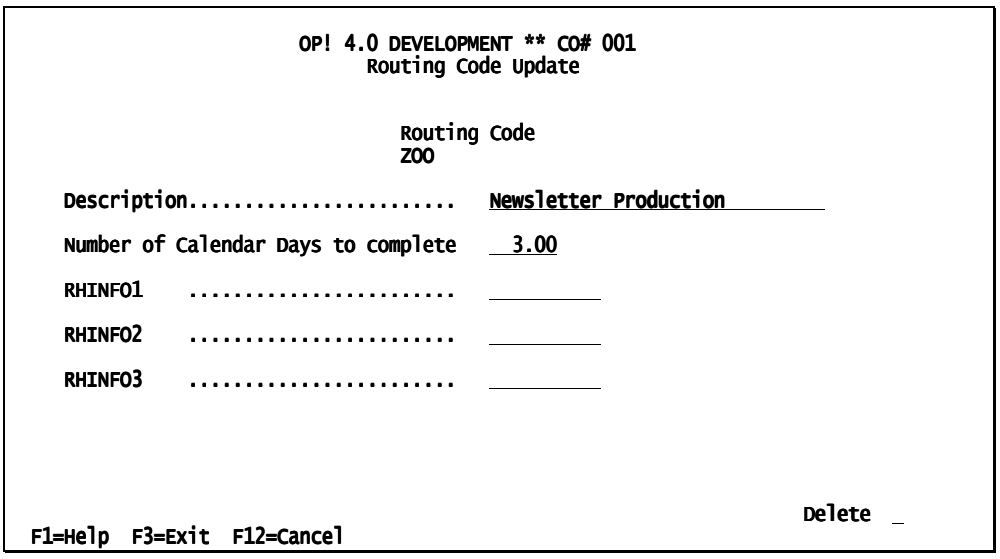
1a. Complete this field:

Routing Code
Type a name to identify the routing code that you will use to define the steps (sequences) required for the manufacturing process.

1b. Press **Enter** to display the *Routing Code Update panel (figure 7)*.

To change Routing code

1. On the *Routing Header Master Inquiry panel (figure 5)*, type **2** (Change), beside the **Routing** code you want to work with, then press **Enter** to display the *Routing Code Update panel (figure 7)*.



Routing Code Update panel (figure 7)

2. Complete these fields:

Description

Type a description of the **Routing** code you are defining.

Number of Calendar Days to complete

Type the number of days that you expect production of this product to last. This reflects *calendar* days, not work days. This information will be used to calculate an estimated completion date when a work order is released, based on the date it is released. Because these days are not sensitive to the quantity being manufactured, and do not consider shop capacity, you may need to change the estimated completion date of a released work order.

Info field 1 / Info field 2 / Info field 3

These user-definable fields can be used to collect miscellaneous information about each **Routing** code. Data entry into in these fields may be optional or mandatory depending on how you define the fields in the **Company Profile** (see page 2).

3. Press **Enter** to update the **Routing** code.

To display a Routing code

On the *Routing Header Master Inquiry panel (figure 5)*, type **5** (Display) beside the **Routing** code you want to see, then press **Enter** to display the *Routing Header Display window* similar to *Routing Code Update panel (figure 7)*.

To work with Routing Header Notes

Routing Header Notes are used to record any additional information you want to associate with this **Routing Header**, and optionally print on selected work order documents.

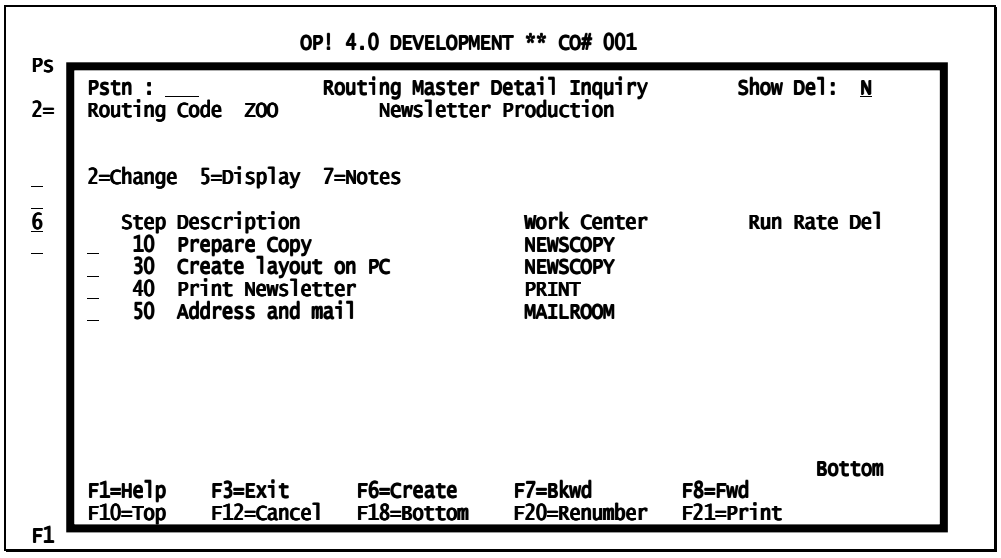
On the *Routing Header Master Inquiry panel (figure 5)*, type **7** (Notes) beside the **Routing Header** you want to see, to display the *Routing Header Notes panel* (not shown). See the "Working with Work Order Notes" section on page 62 for detailed instructions.

Working with Routing Steps

A **Routing Step** defines a single action in the manufacturing process, and identifies where (in which **Work Center**) it takes place.

To work with Routing Steps

1. On the ***Routing Header Master Inquiry panel*** (figure 5), type **6** (Routing Steps) to display the *Routing Master Detail Inquiry panel (figure 8)*.



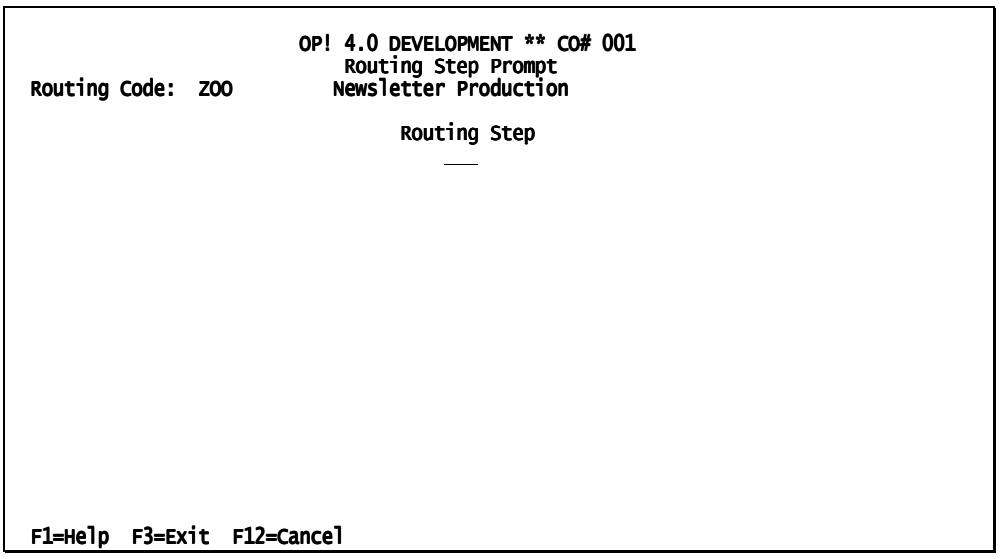
Routing Master Detail Inquiry panel (figure 8)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Routing Step Update panel (figure 10)* to work with an existing **Routing Step**
5=Display	Display the display the *Routing Step Display window* similar to *Routing Step Update panel (figure 10)* to view a **Routing Step**'s set up
7=Notes	Display the *Routing Step Notes window* (not shown) similar to *Routing Header Notes window (figure 63)* to work with notes specific to the selected **Routing Step**.
F6=Create	Display the *Routing Step Prompt panel (figure 9)* to create a new **Routing Step**
F20=Renumber	Renumbers the routing steps in increments of 10.

To create a new Routing Step

1. On the *Routing Master Detail Inquiry panel (figure 8)*, press **F6** (Create) to display the ***Routing Code Prompt panel (figure*** 6).



Routing Step Prompt panel (figure 9)

1a. Complete this field:

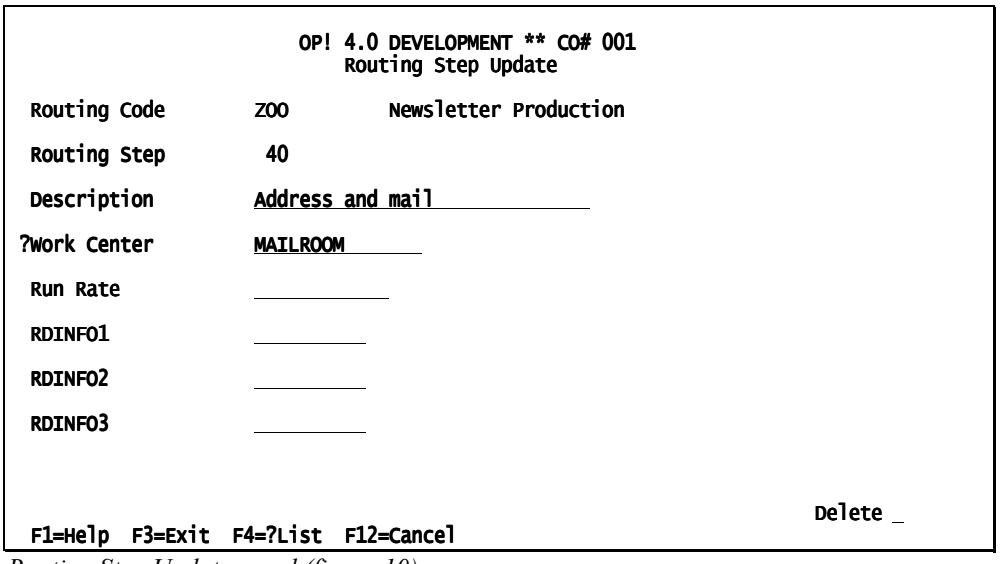
Routing Step

Type a number that sequences this step in the manufacturing process chronologically, relative to the other steps. Any numbers from 001 to 999 may be used. There is a re-numbering function which can renumber the routing steps in increments of 10 (or less if there are more than 99 routing steps).

1b. Press **Enter** to display the *Routing Step Update panel (figure 10)*.

To change Routing Step

1. On the *Routing Master Detail Inquiry panel (figure 8)*, type **2** (Change), beside the **Routing Step** you want to work with, then press **Enter** to display the *Routing Step Update panel (figure 10)*.



Routing Step Update panel (figure 10)

2. Complete these fields:

Description
Type a description of the **Routing Step** you are defining.

Work Center
Type the user-defined code that describes logical **Work Center** which will be used in this routing step.

Run Rate
Possible future enhancement

3. Press **Enter** to update the **Routing Step**.

To display a Routing Step

On the *Routing Master Detail Inquiry panel (figure 8)*, type **5** (Display) beside the **Routing Step** you want to see, then press **Enter** to display the *Routing Step Display window* similar to *Routing Step Update panel (figure 10)*.

To work with Routing Step Notes

Routing Step Notes are used to record any additional information you want to associate with this **Routing Step**.

On the *Routing Master Detail Inquiry panel (figure 8)*, type **7** (Notes) beside the **Routing Step** you want to see, to display the *Routing Step Notes window* (not shown). See the "Working with Work Order Notes" section on page 62 for detailed instructions.

Working with Work Order Comment Codes

A **Work Order Comment code** is a user-defined alphanumeric code that may be assigned to a line of notes related to a **Work Order**. You can specify whether or not you want the notes to print on **Work Orders** and/or the **Work Orders Pick Tickets** which are produced for picking component items.

1. From the ***ORDER POWER!*** *Main Menu*, select: **Work with Files ➔Work Order Comment Codes** to display *Work Order Comment Code Inquiry panel (figure 11)*.

```
                        OP! 4.0 DEVELOPMENT ** CO# 001
Position To : ___       Work Order Comment Code Inquiry       Show Delete : N

2=Change  5=Display

   Code  Description                                                    Del
_  INF   Who to see for more info about this job
_  MSC   Miscellaneous

                                                                      Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot F21=Print
```

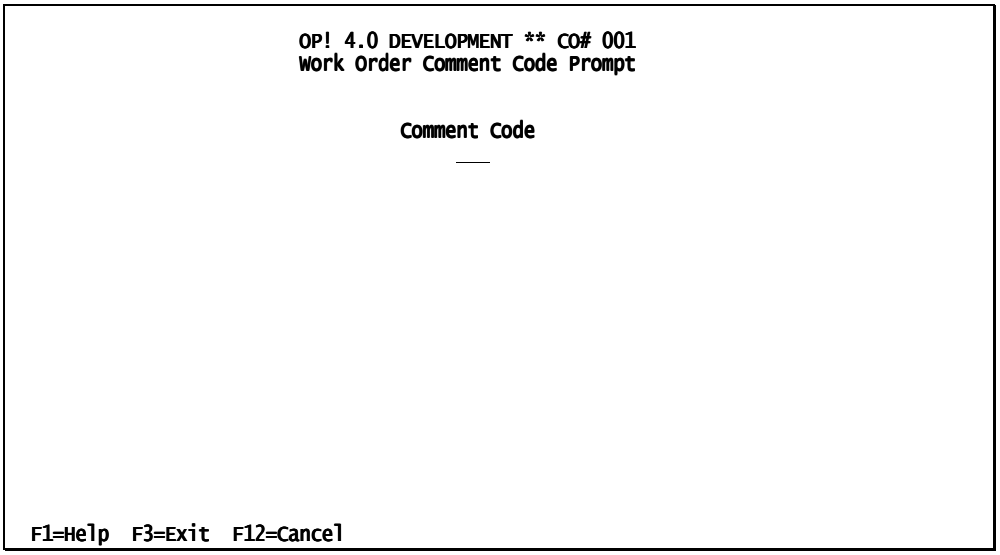
Work Order Comment Code Inquiry panel (figure 11)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Work Order Comment Code Update panel (figure 13)* to work with an existing **Work Order Comment Code**
5=Display	Display the *Work Order Comment Code Display window* similar to *Work Order Comment Code Update panel (figure 13) to view a* **Work Order Comment Code***'s set up*
F6=Create	Display the *Work Order Comment Code Prompt panel (figure 12)* to create a new **Work Order Comment Code**

To create a new Work Order Comment Code

1. On the *Work Order Comment Code Inquiry panel (figure 11)*, press **F6** (Create) to display the *Work Order Comment Code Prompt panel (figure 12)*.



Work Order Comment Code Prompt panel (figure 12)

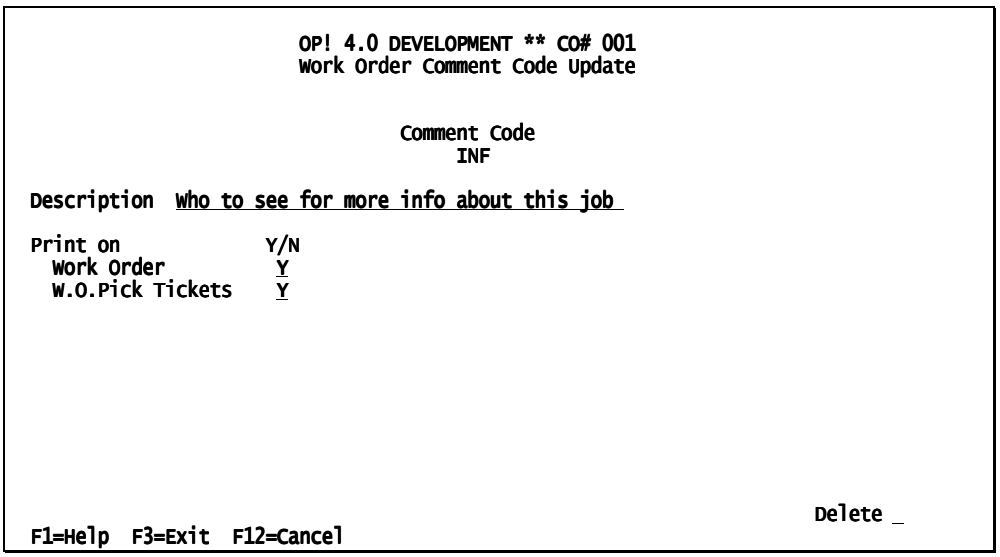
1a. Complete this field:

Comment Code
Type a code that you want to be available for assignment to comments, when they are entered later by users.

1b. Press **Enter** to display the *Work Order Comment Code Update panel (figure 13)*.

To change a Work Order Comment Code

1. On the *Work Order Comment Code Inquiry panel (figure 11)*, type **2** (Change), beside the **Work Order Comment Code** you want to work with, then press **Enter** to display the *Work Order Comment Code Update panel (figure 13)*.



Work Order Comment Code Update panel (figure 13)

2. Complete these fields:

Description
Type a description of the **Work Order Comment Code** you are defining.

Print on: Work Order
Print on: W.O.Pick Tickets
Type **Y**(es) or **N**(o) to indicate whether or not you want to print the comments created using this code.

- When Work Order comment codes are used in **Bill of Materials** notes, only the "print on pick ticket" flag is recognized, which conditions the printing of BOM notes on the pick ticket which is produced from Work Order option #4 (Issue Components).

- When Work Order comment codes are used on **Routing** notes, only the "print on work order" flag is recognized.

3. Press **Enter** to update the **Work Order Comment Code**.

To display a Work Order Comment Code

On the *Work Order Comment Code Inquiry panel (figure 11)*, type **5** (Display) beside the **Work Order Comment Code** you want to see, then press **Enter** to display the *Work Order Comment Code Display window* similar to *Work Order Document Update panel (figure 53)*.

Setting up GL for Work Orders

General Ledger contra-inventory accounts must be established for the new Inventory Transaction Effect codes:

031 Transfer Component To/From WIP
032 WO Receipt - Finished Good
033 WO Component Used
034 WO Scrap

The General Ledger entries to the contra accounts for inventory transactions 031, 032, and 033 will always net to zero. For example, when a component is transferred to WIP, the following GL entries are made:

- Transaction 031 removes the component from its non-WIP location. The component's inventory account is credited, and the contra account for Transaction 031 is debited.

- Another Transaction 031 places the component into its WIP location. The component's inventory account is debited, and the contra account for Transaction 031 is credited.

When the above two transactions are posted to the General Ledger, the net effect is zero, to both the inventory and the contra accounts. However the contra account must be defined, and must be a valid GL account, for the entries to be made correctly.

When components are used in a manufactured item, the following GL entries are made:

- Transaction 033 removes the components from inventory. The components' inventory accounts are credited, and the contra account for Transaction Effect Code 033 is debited for the value of the components.

- Transaction 032 places the parent into inventory. The parent's inventory account is debited, and the contra account for Transaction Effect Code 032 is credited for the value of the components.

The contra account for 033 is debited with the same amount as the contra account for 032. When the above transactions are posted to the General Ledger, the net effect on the contra accounts is zero. However the contra account(s) must be defined, and must be valid, for the entries to be made correctly.

Dedicated "wash" accounts are recommended for use as the contra accounts for Transaction Effect codes 031, 032, and 033. The same GL account may be used as the contra account for all three transactions, or different accounts may be used, but the sum of the transactions to those three accounts will always net to zero. If those account(s) are dedicated to these **Work Order** transactions and are audited periodically, a non-zero net balance indicates an accounting error.

Transaction Effect Code 034 is used when you write off the expense of scrapped components. The component's inventory account is credited and the contra account is debited. A contra account must be assigned or no scrap entries will be made to the General Ledger.

Summary of GL Setup for Work Orders

If you are using the General Ledger, a contra account must be assigned to Transaction Effect codes 031, 032, 033 and 034. The identical account may be used as the contra account for Transaction Effect codes 031, 032 and 033. ***ORDER POWER!*** should maintain a zero balance in that account. A different account should be used for the 034 scrap transaction.

Working with Manufacturing Cost Types and GL Manufacturing Classes

The cost of materials components is only a part of the cost of a manufactured product. Other costs, such as Direct labor, Indirect labor, Temp labor, Fixed overhead, Variable overhead, depreciation, rent, etc. also contribute to the cost of the product and are supported as **standard costs**. These standard costs, plus the cost of materials, make up the total cost of manufacturing an item and are used in calculating the average inventory cost of such items.


You must set up **Manufacturing Cost Types** before **GL Manufacturing Classes**.

There are three tasks which define those standard costs:

- Define up to 24 company-wide **Manufacturing Cost Types**, such as Direct labor, Indirect labor, Temp labor, Fixed overhead, Variable overhead, depreciation, rent, etc.
- Create **Manufacturing GL Classes**, in which you assign a GL account to each of the cost types above.
- Assign a **Manufacturing GL Class** to an item, and define the per-unit overhead costs for that item by Cost Type.

To work with Manufacturing Cost Types

1. From the **ORDER POWER!** Main Menu, select:
   Work with Files Ö Manufacturing Cost Types Ö F15 (Maintenance) to display the *Manufacturing Cost Type Maintenance panel (figure 14)*.

```
                    OP! 4.0 DEVELOPMENT ** CO# 001
                  Manufacturing Cost Type Maintenance


Cost Type  1 Labor                    Cost Type 13
Cost Type  2 Overhead                 Cost Type 14
Cost Type  3 Packaging                Cost Type 15
Cost Type  4                          Cost Type 16
Cost Type  5                          Cost Type 17
Cost Type  6                          Cost Type 18
Cost Type  7                          Cost Type 19
Cost Type  8                          Cost Type 20
Cost Type  9                          Cost Type 21
Cost Type 10                          Cost Type 22
Cost Type 11                          Cost Type 23
Cost Type 12                          Cost Type 24




  F1=Help  F3=Exit  F12=Cancel
```

Manufacturing Cost Type Maintenance panel (figure 14)

2. For each **Manufacturing Cost Type** you are defining, type a description of the costs you want the ability to accumulate in your **GL Manufacturing Classes**. These descriptions appear on *Work Order Document Update panel (figure 53)*.

To work with GL Manufacturing Classes

When overhead costs are applied to a manufactured item, the item's Inventory account is debited. The Overhead account in the item's GL Manufacturing Class is credited. A comparison of those credit amounts with the actual overhead expenses booked, will reveal variances of standard-to-actual overhead costs.

From the **ORDER POWER!** Main Menu, select: **Work with Files Ö GL Manufacturing Classes** to display the *GL Manufacturing Class Inquiry panel (figure 15)*.

```
                        OP! 4.0 DEVELOPMENT ** CO# 001
Pstn : ___              GL Manufacturing Class Inquiry        Show Delete: N

2=Change  5=Display

     GL Class    Description                          Del
_      NWS       Newsletter Production
_      HAT       Hat Production
_      SHU       Shoe Production
_      MIS       Miscellaneous

                                                                    Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot F21=Print
```

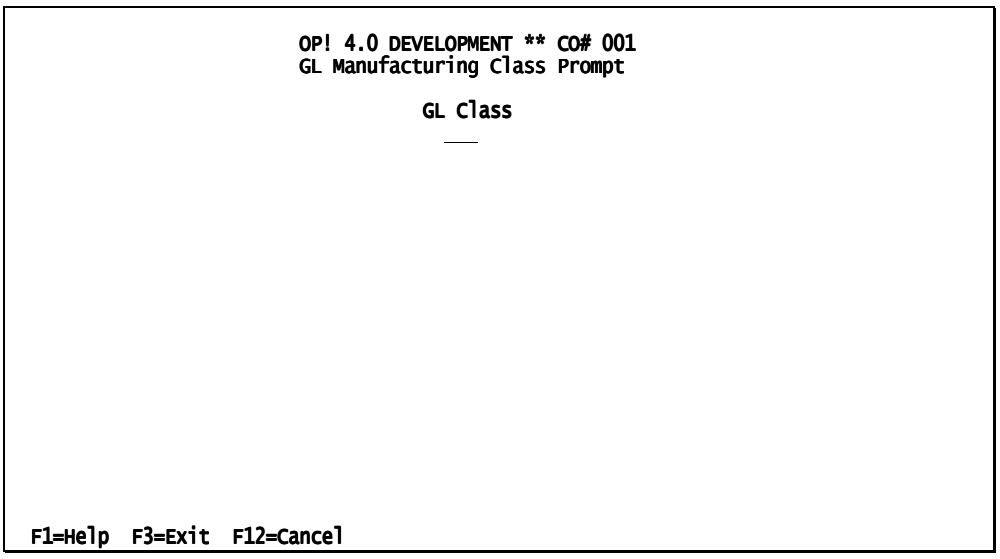
GL Manufacturing Class Inquiry panel (figure 15)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Work Order Document Update panel (figure 53)* to work with an existing **GL Manufacturing Class**
5=Display	Display the *GL Manufacturing Class Display window* similar to *Work Order Document Update panel (figure 53)* to view a **GL Manufacturing Class***'s set up*
F6=Create	Display the *Work Order Document Prompt panel (figure 52)* to create a new **GL Manufacturing Class**

To create a new GL Manufacturing Class

1. On the *GL Manufacturing Class Inquiry panel (figure 15)*, press **F6** (Create) to display the *Work Order Document Prompt panel (figure 52)*.



GL Manufacturing Class Prompt panel (figure 16)

1a. Complete this field:

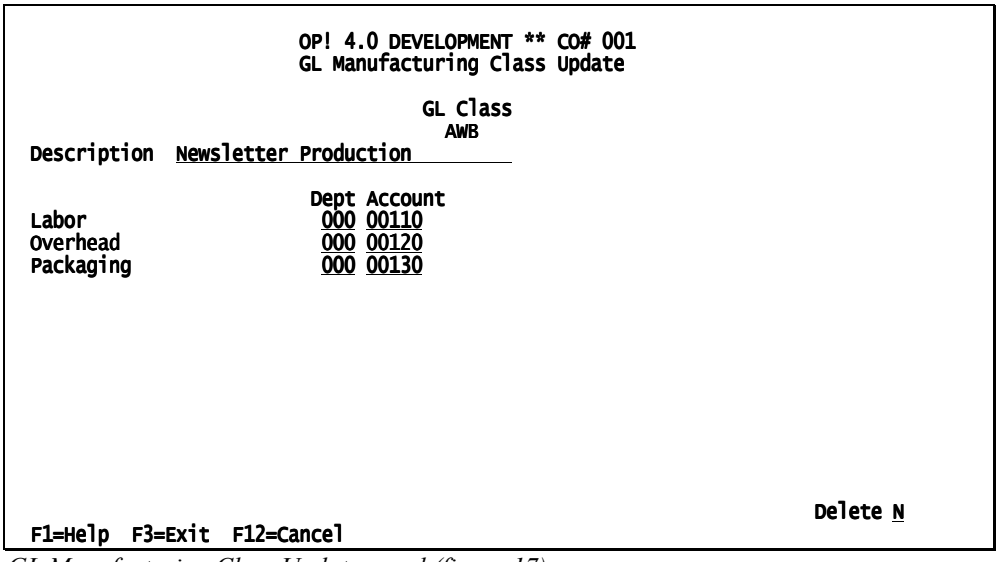
GL Class

Type a code that you want to assign to related manufacturing costs for **General Ledger** posting purposes. **GL Manufacturing Classes** can be defined to indicate which GL accounts are affected by certain manufacturing costs that you defined on *Manufacturing Cost Type Maintenance panel (figure 14)*.

1b. Press **Enter** to display the *Work Order Document Update* panel (figure 53).

To change a GL Manufacturing Class

1. On the *GL Manufacturing Class Inquiry panel (figure 15)*, type **2** (Change), beside the **GL Manufacturing Class** you want to work with, then press **Enter** to display the *Work Order Document Update* panel (figure 53).



GL Manufacturing Class Update panel (figure 17)

2. Complete these fields:

Description
Type a description of the **GL Manufacturing Class** you are defining.

3. The **Manufacturing Cost Types** which you previously defined are displayed. For each manufacturing cost type displayed, complete the following fields:

Dept / Account
Type the GL account you wish to be credited for each overhead cost type (each manufactured item's inventory account is the GL account to be debited). Enter the **Department** and **Account** numbers, defined in the **General Ledger** account number format. The ***ORDER POWER!*** GL account number is defined to be CCC-DDD-AAAAA, where CCC is the **Company** number, DDD is the **Department** number, AAAAA is the **Account** number. If no GL account is entered, there will be no GL entries created for that **Manufacturing Cost Type** within this **GL Manufacturing Class**.

3. Press **Enter** to update the **GL Manufacturing Class**.

To display a GL Manufacturing Class

On the *GL Manufacturing Class Inquiry panel (figure 15)*, type **5** (Display) beside the **GL Manufacturing Class** you want to see, then press **Enter** to display the *GL Manufacturing Class Display window* similar to *Work Order Document Update* panel (figure 53).

Setting up Items for Work Orders

Here is a checklist of things you will need to set up for each **Manufactured Item** to use **Work Orders**:

- ❑ **Item master set up** *see below*
- ❑ **Bill of Materials** *see page 20*
- ❑ **Warehouse Location** *see page 23*
- ❑ **Setting up Manufacturing Cost** (optional) ..... *see page 24*

Item Master settings

1. From the **ORDER POWER!** ***Main Menu***, select: **Work with Files ➔Items** to display the ***Item Selection*** *panel*.

2. Type the name of the **Item** you want to work with in the **Item Code** field, then press **Enter** to display the *Item Inquiry* panel.

3. Type **2** (Change) beside the **Item** you want to work with, then press **Enter** to display the *Item Update panel (figure 18)*.

```
                    OP! 4.0 DEVELOPMENT ** CO# 001
                            Item Update

 Item           POLICEUNIFORM
 Description    Miami Dade County Officer's Uniform
 Search Words   _____ _____ _____
 Start Date     ________   End Date ________          Creation Date  6/14/02
?Primary Vendor _________   ?Style _________
 Stock    _ ?Stock UOM    _____ *G          1.000 Each
 Salable  _ ?Sales UOM    _____ *G          1.000 Each
           ?Purchase UOM  _____ *G          1.000 Each
 Manufactured    M M/S/N  ?Routing Code __________  Drop Ship _
 Phase Out       _   Phase Out Date ________
 Royalty Item    _  ?Royalty Vendor _________  Royalty ______   _  A/P
 Kit Parent Item _   List Components on Documents _ On Invoice  _
 Assortment Item _   Allow Partial Ship           _
 Continuity Item _   Serial/Lot/Gift Certificate _ S/L/G
 Gift Certificate:   Face Value  _____________  Fixed  _ Y/N
?Superseding Item  _____________
 Check Superseding Available _
?Supersede Comment Code    ___                                    Delete _
F1=Help    F3=Exit        F4=?List      F6=Ext Desc                F12=Cancel
F14=Hist   F15=Qty Avail  F16=Open POs  F22=Audit    F23=User     F24=More
```

Item Update panel (figure 18)

4. Complete the **Item** setup as needed. The following fields are required for a **Manufactured Item**:

Stock

A Manufactured Item must be Stock **Y**(es).

Manufactured

Type a code to indicate if this **Manufactured Item** is:

M (Make-to-Order Item)
S (Make-to-Stock Item)

A **Make-to-Order Item** is an item which is customized or normally not inventoried, that you manufacture to the requirements of a single order. A **Make-to-Stock Item** is marketable to many customers, and probably made in advance of expected orders.

For more information about working with **Items**, see the "*ORDER POWER!* Item Maintenance Users Guide."

working with **Items**, see the "*ORDER POWER!* Item Maintenance Users Guide."

To support legacy functionality, values of Y, N or blank will be accepted into this field. Those values indicate that the item is <u>not</u> a manufactured item.

Routing Code

Type the user-defined code that describes the manufacturing process you have defined for this **Item**. This is a default routing code which may be overridden for any work order.

5. When you have completed all the **Item** maintenance panels, press **Enter** to update the **Item** record.

Bill of Materials

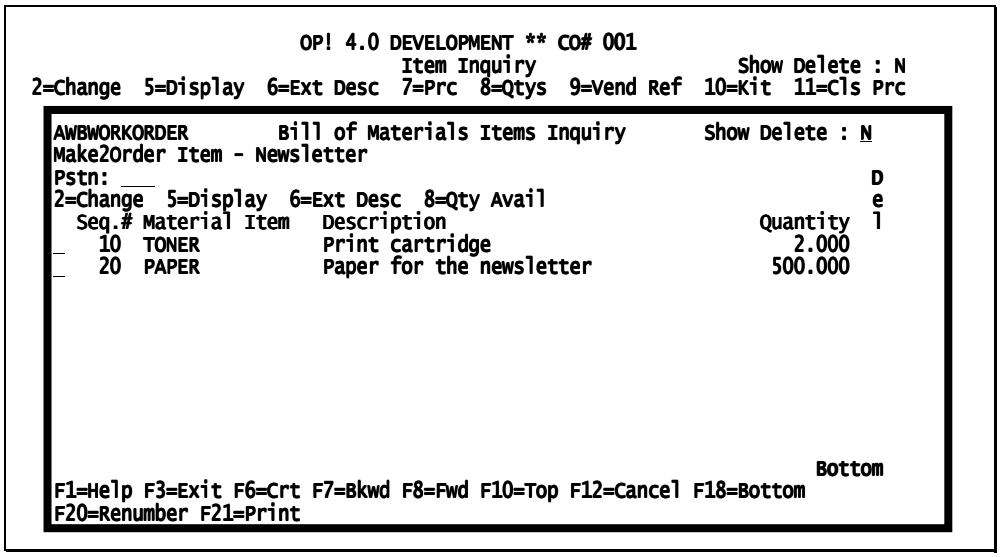
For each manufactured **Item**, you must create a **Bill of Materials** (BOM) that defines all of the **Component items** necessary. You can create a single-level BOM for a finished **Item** or subassembly. A BOM can contain subassemblies which have their own BOM to create an unlimited number of levels. The BOM tracks all material costs, (including scrap) used in producing an **Item**.

To create a Bill of Materials

1. From the **ORDER POWER!** ***Main Menu***, select: **Work with Files ➔Items** to display the ***Item Selection*** *panel*.

2. Type the name of the **Item** you want to work with in the **Item Code** field, then press **Enter** to display the *Item Inquiry* panel.

3. Type **10** (Kit) beside the **Manufactured Item** you want to work with to display *Bill of Materials Items Inquiry panel (figure 19)*. When Option 10 is used with a Manufactured item, the Bill of Materials panels are displayed. When the same option is used with a Kit, the Kit Components panels are displayed.



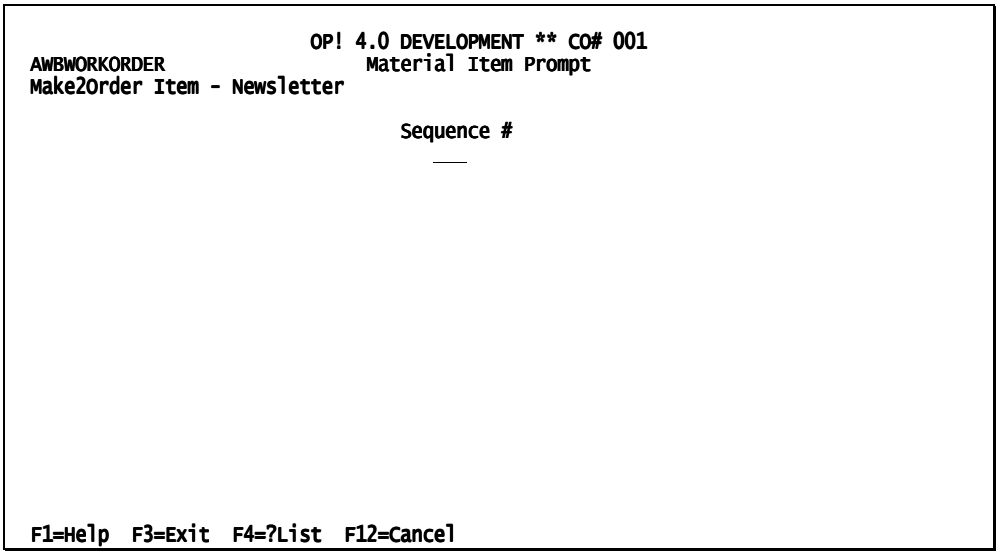
Bill of Materials Items Inquiry panel (figure 19)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Material Item Update panel (figure 21)* to work with an existing **Materials Item**
5=Display	Display the *Materials Item Display window* similar to *Material Item Update panel (figure 21)* to view a **Materials Item**'s set up
F6=Crt	Display the *Material Item Prompt panel (figure 20)* to create a new **Materials Item**
F20=Renumber	Renumber the displayed **Items**, in the same order, but incrementing by 10

To add (create) a new Materials Item to a Bill of Materials

1. On the *Bill of Materials Items Inquiry panel (figure 19)*, press **F6** (Create) to display the *Material Item Prompt panel (figure 20)*.



Material Item Prompt panel (figure 20)

1a. Complete this field:

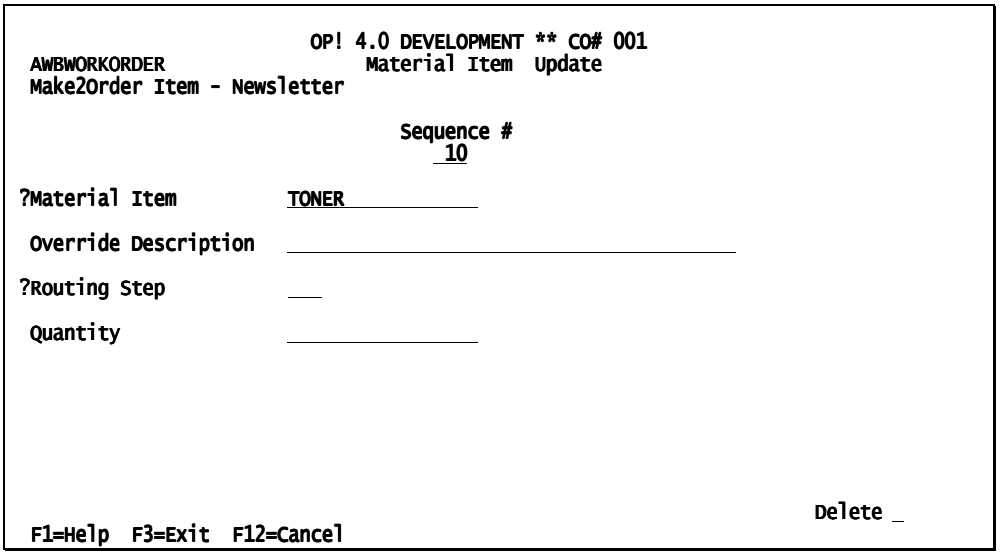
Sequence #

Type a user-defined **Sequence Number** for a component used in manufacturing. The **Sequence Number** permits you to use a single **Item** more than once in a **Bill of Materials** so that you can assign different quantities and descriptions to the same part when it is used in more than one step of the manufacturing process.

1b. Press **Enter** to display the ***Work Order Document Update*** panel (figure 53).

To change a Materials Item on a Bill of Materials

1. On the *Bill of Materials Items Inquiry panel (figure 19)*, type **2** (Change), beside the **Materials Item** you want to work with, then press **Enter** to display the *Material Item Update panel (figure 21)*.



Material Item Update panel (figure 21)

2. Complete these fields:

Material Item
Type the **Item** number of the component you are adding to the **Bill of Materials**.

Override Description (optional)
Type an optional description that you want to associate with this **Material Item**, for purposes of this manufactured **Item**/Sequence number.

Routing Step
Type an optional **Routing Step** that you want to associate with this **Material Item**, for purposes of this manufactured **Item**/Sequence number.

Quantity
Type the quantity of this **Material Item** that you want to associate with this **Manufactured Item**, for purposes of this **Manufactured Item/Sequence Number**.

3. Press **Enter** to update the **Bill of Materials**.

To display a Materials Item

On the *Bill of Materials Items Inquiry panel (figure 19)*, type **5** (Display) beside the **Materials Item** you want to see, then press **Enter** to display the *Materials Item Display window* similar to ***Work Order Document Update*** panel (figure 53).

To add a Warehouse Location for the Manufactured Item

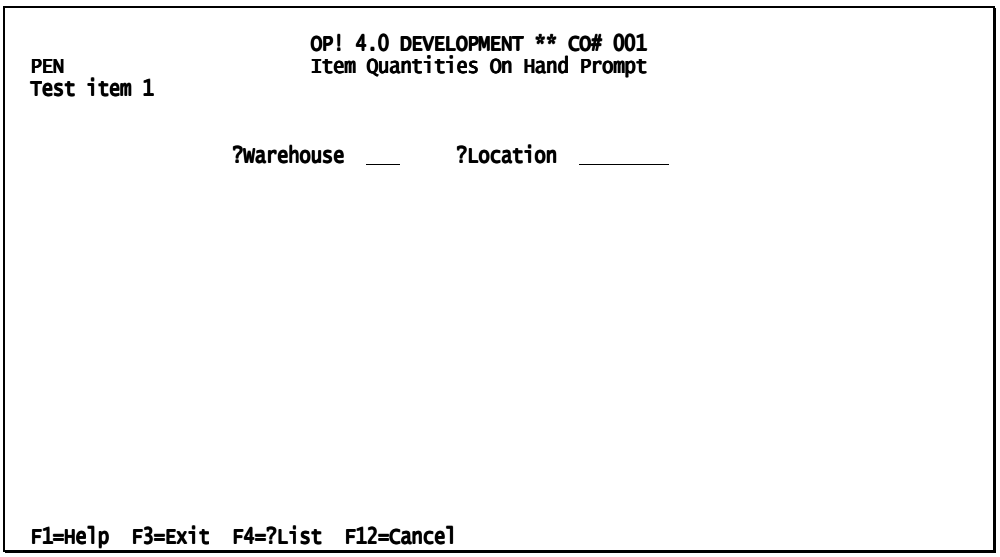
This step is not necessary if a **Warehouse Location** already exists for the **Item**. Multiple locations may optionally be defined, and any location may be overridden during transaction entry.

1. From the **ORDER POWER!** ***Main Menu***, select: **Work with Files ➔Items** to display the ***Item Selection*** *panel*.

2. Type the name of the **Item** you want to work with in the **Item Code** field, then press **Enter** to display the *Item Inquiry* panel.

3. Type **13** (QOH) beside the **Item** you want to work with, then press **Enter** to display the *Item Quantities On Hand window*.

4. Press **F6** (Create) to display the *Item Quantities On Hand Prompt panel (figure 22)*.



Item Quantities On Hand Prompt panel (figure 22)

5. Complete these fields:

Warehouse
Type a user-defined code for the **Warehouse** where the **Manufactured Item** will be stored.

Location
Type a user-defined code for the **Location** within the **Warehouse** where the **Manufactured Item** will be stored.

6. Press **Enter** to display the *Item Quantities On Hand Update panel*.

7. Complete the fields on that panel as necessary (see the "ORDER POWER! Item Maintenance Users Guide" for more information about this panel), then press **Enter** to update the **Warehouse Location** record.

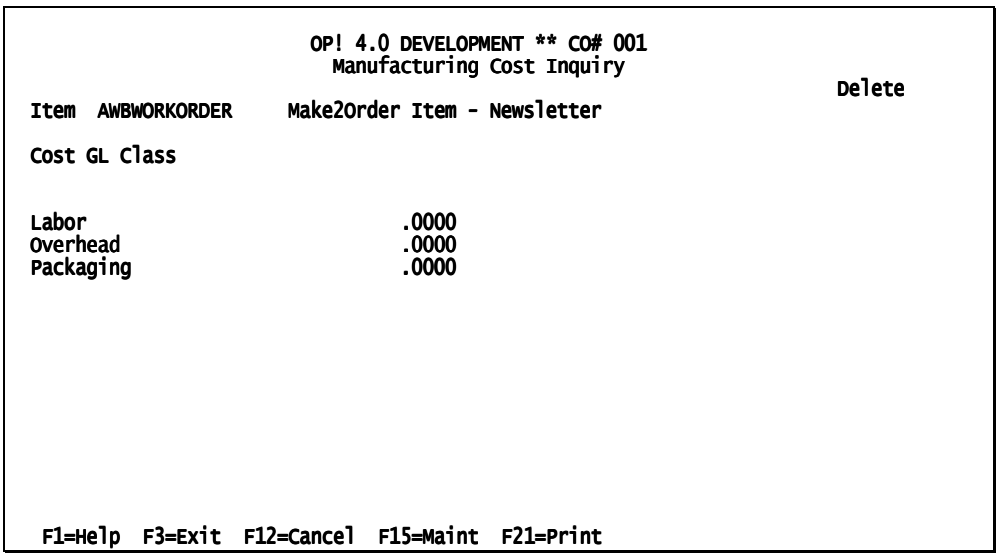
To set up manufacturing cost for an Item

This is an optional step. The manufactured cost of an **Item** is a user-definable standard cost for labor and overhead, plus the average inventory cost of its **Material Items**. Those costs adjust the **Parent Item**'s average cost and associated inventory GL account during receipt of the **Item** from a **Work Order**. The contra-inventory GL accounts for labor and overhead are user-definable.

1. From the **ORDER POWER!** ***Main Menu***, select: **Work with Files ➔Items** to display the ***Item Selection*** *panel*.

2. Type the name of the **Item** you want to work with in the **Item Code** field, then press **Enter** to display the *Item Inquiry* panel.

3. Type **34** (Manufacturing/Kit-to-Stock Cost) beside the **Item** you want to work with, then press **Enter** to display the *Manufacturing Cost Inquiry panel (figure 23)*.



Manufacturing Cost Inquiry panel (figure 23)

4. Press **F15** (Maint) to unprotect input, then complete these fields to record manufacturing costs for the selected **Item**:

   Cost GL Class

   Type the user-defined code that indicates the **GL Manufacturing Class** you want to associate with this **Item**. (See page 17 for more information about setting up **GL Manufacturing Classes**).

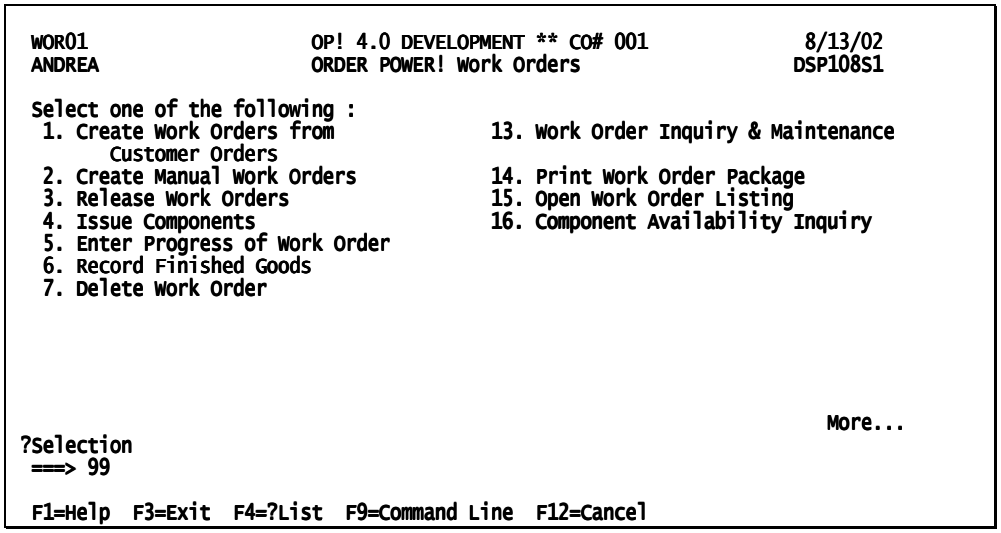
   Labor / Overhead / Packaging

   Type the costs, per stocking unit of measure, you want to associate with this **Manufactured Item**.

5. Press **Enter** to update the **Manufacturing Cost Item** record.

Managing Production with OP! Work Orders

From the ***ORDER POWER! Main Menu***, select **Work Orders** to display *ORDER POWER! Work Orders menu (figure 24)*.



ORDER POWER! Work Orders menu (figure 24)

These options are available from the *ORDER POWER! Work Orders menu*:

Option	Description
1. Create Work Orders from Customer Orders	Display *Work Orders Creation panel (figure 25)* to create new **Work Orders** based on existing customer orders for Make-to-Order **Items**.
2. Create Manual Work Orders	Display *Create Manual Work Order Prompt panel (figure 26)* to create **Work Orders** on demand for **Make-to-Stock Items**
3. Release Work Orders	Display *Work Order Release panel (figure 28)* to release **Work Orders** before you can begin work
4. Issue Components	Display *Issue Components Select panel (figure 29)* to issue Items into your **Warehouse**'s **Work In Process Location**
5. Enter Progress of Work Order	Display *Progress of Work Order Prompt panel (figure 33)* to track work in progress on **Work Orders**
6. Record Finished Goods	Display *Record Finished Goods Prompt panel (figure 35)* to move inventory of the newly completed **Items** to its correct location in your **Warehouse. You also close completed Work Orders with this option.**
7. Delete Work Order	Display *Delete Work Order Prompt panel (figure 40)* to delete a **Work Order**
13. Work Order Inquiry & Maintenance	Display *Work Order Inquiry panel (figure 41)* to work with existing **Work Orders**
14. Print Work Order Package	Display *Work Order Document Package panel (figure 59)* to print **Specifications**, **Bills of Materials**, and **Progress Reports** for each **Routing Step** on selected **Work Orders**.

Option	Description
15. Open Work Order Listing	Displays the *Open Work Order Selection panel (figure 60)* to print a report of the current status of all open **Work Orders**.
16. Component Availability Inquiry	Display *Component Availability Inquiry panel (figure 61)*

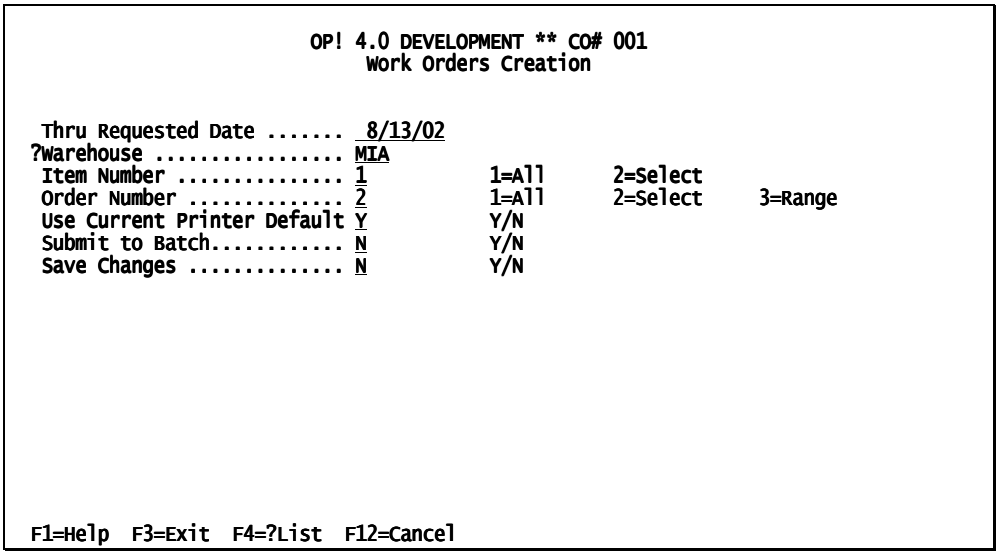
Creating Work Orders from Customer orders

Make-to-Order Items can be automatically transferred to production orders from customer orders. This batch program can automatically create one work order for every make-to-order line in customer orders. Optionally, those work orders can be created manually. When the work order is subsequently released to production, the Estimated Completion Date of the work order becomes the Scheduled Shipment date of the ordered item in the customer's order if the Company Profile says to do so. When it's finished, the manufactured item is committed to its customer order.

To create Work Orders from Customer orders

Use this option to generate **Work Orders** based on existing customer orders for **Make-to-Order Items**. (Use the "Create Manual Work Orders" option to create **Work Orders** for **Make-to-Stock Items**.) You cannot create **Work Orders** for orders that are on HOLD.

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Create Work Orders from Customer Orders** to display *Work Orders Creation panel (figure 25)*.



Work Orders Creation panel (figure 25)

2. Complete these fields to select **Customer Orders** for which you want to create **Work Orders**:

Thru Requested Date

Type a date **Work Orders** will be created for **Make-to-Order** items in customer orders, where the Requested Shipment Date of the ordered item is earlier than or equal to the date entered here.

Warehouse

Type a user-defined code that indicates which **Warehouse** you want to create **Work Orders** for.

Item Number

Type a code to indicate if you want to:

1 Create **Work Orders** for all **Make-to-Order Items** that have been ordered by customers

2 Create **Work Orders** for specific **Make-to-Order Items** that have been ordered by customers

Order Number

Type a code to indicate if you want to create **Work Orders** for:

1 All customer orders.

2 Specific customer orders.

3 A range of customer orders.

Use Current Printer Defaults

Type **Y**(es) or **N**(o) to indicate whether or not you want to change the existing printer defaults for the current report.

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal, or run the report interactively which locks the terminal until the program has completed.

Y (es) indicates that the report will be submitted as a batch job

N (o) indicates that the report will be run interactively

Save Changes

Type **Y**(es) or **N**(o) to indicate whether or not you want any changes made to the defaults for the current panel to be applied to all subsequent displays of that panel. This eliminates redundant data entry.

3. Press **Enter** to create **Work Orders**.

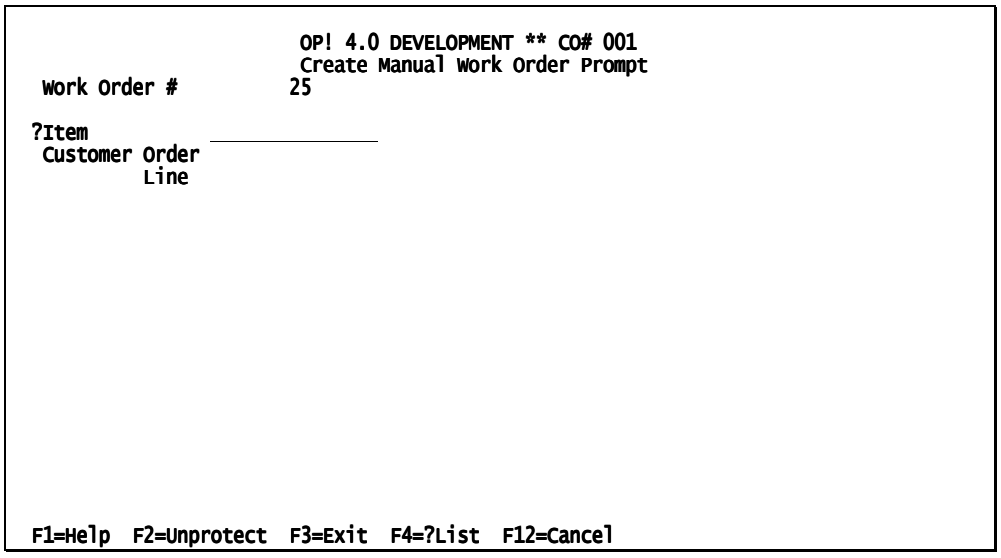
Creating Manual Work Orders

Use this option to generate **Work Orders** on demand for **Make-to-Stock Items.** It may optionally be used for **Make-to-Order Items** on specific sales order/lines.

If you choose to create manual work orders for **Make-to-Order** customer orders, Order Power! will not prevent you from creating and releasing more than one manual work order for a single Make-to-Order customer order and line, nor will it prevent you from creating and releasing manual work orders whose quantities, individually or in total, exceed those ordered by the customer. The customer order's Audit will show every work order created, however the ordered line will only show the most recent work order created. As those multiple work orders are completed, they will each be committed to the customer order, up to the quantity ordered by the customer. Any excess quantities completed will be placed, uncommitted, into inventory.

To create Manual Work Orders:

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Create Manual Work Orders** to display *Create Manual Work Order Prompt panel (figure 26)*.



Create Manual Work Order Prompt panel (figure 26)

2. If you are creating a **Work Order** for a **Make-to-Stock Item**, complete this field:

   Item
   Type the Item number of the **Make-to-Stock Item** for which you are creating this **Work Order**.

   - or -

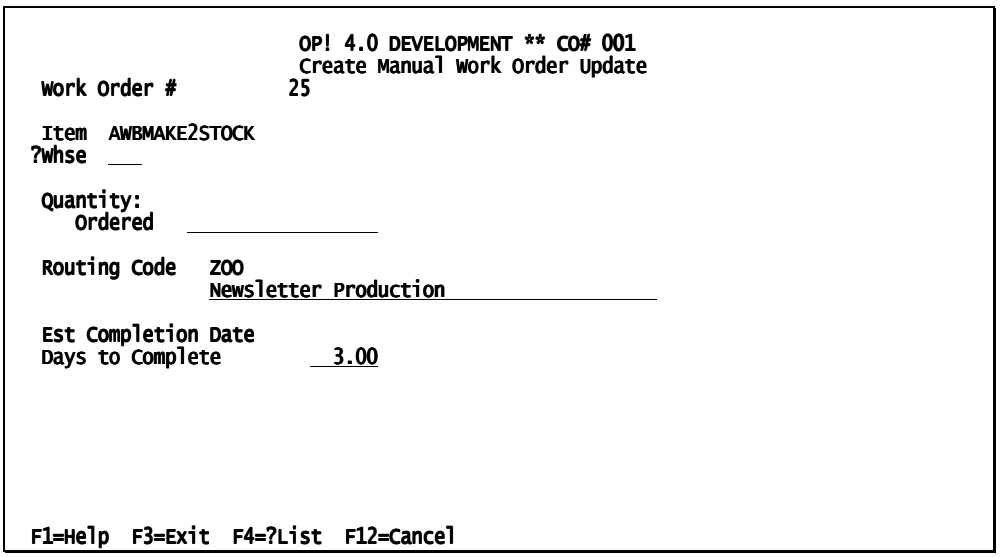
   If you are creating a **Work Order** for a **Make-to-Order Item**, press **F2** (Unprotect), then complete these fields:

   Customer Order
   Type the order number for which you are creating this **Work Order**.

   Line
   Type the line number (within the order you entered above) for which you are creating this **Work Order**.

3. Press **Enter** to display the **Routing Code** field, which is prefilled with the **Routing Code** you defined on *Item Update panel (figure 18)*.

4. Press **Enter** to continue, or type a different user-defined **Routing code** that contains the steps necessary for manufacturing this **Item**, then press **Enter** to display the *Create Manual Work Order Update panel (figure 27)*.



Create Manual Work Order Update panel (figure 27)

5. Complete these fields:

Whse

Type the user-defined code that indicates the production **Warehouse** for this manufactured **Item**.

Quantity Ordered

Type the quantity of the **Item** that you intend to produce.

Routing Code (optional override description)

Type an alternative description of the **Routing Code** that you have used for this **Work Order**.

Est Completion Date (optional)

Type the estimated completion date of the Work Order. If left blank, when the Work Order is released to production this date will be calculated using the field below, "Days to Complete". Also when a Make-to-Order Work Order is released, this date plus "Add on days to complete" in the Company Profile may become the Scheduled Release Date of the manufactured item in the Customer Order.

Days to Complete (optional)

Type the number of days that you expect production of this **Item** to last. This reflects *calendar* days, not work days.

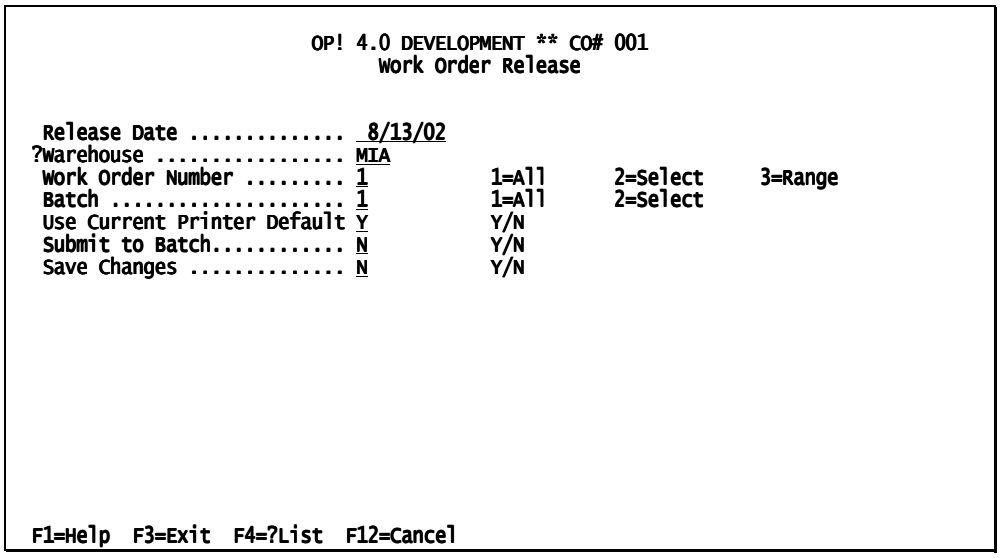
6. Press **Enter** to update the **Work Order.**

Release Work Orders

You must release **Work Orders** before you can begin work. This process creates demand on the components of the **Manufactured Item**'s **Bill of Materials** in their "Qty On Cust Order" and "Qty On WO" totals. When Make-to-Order work orders are released, the associated customer orders' Scheduled Shipment Date may be optionally be changed by the system.

To release Work Orders

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Release Work Orders** to display *Work Order Release panel (figure 28)*.



Work Order Release panel (figure 28)

2. Complete these fields:

Release Date

Type the date on which you expect to release this Work Order to the shop floor. Future dates are acceptable. For Make-to-Order work orders, this date is the starting basis for calculating the customer order's Scheduled Shipment date.

Warehouse

Type a user-defined code that indicates for which **Warehouse** you want to release **Work Orders**.

Work Order Number

Type a code to indicate if you want to:

1 Release all **Work Orders** for the specified **Warehouse**
2 Release selected **Work Orders** for the specified **Warehouse**
3 Release a range **Work Order** numbers for the specified **Warehouse**

Batch

Type a code to indicate if you want to:

1 Release all **Work Orders** for the specified **Warehouse**

2 Release selected batches of **Work Orders** for the specified **Warehouse**

3 Release a range of **Work Order** batches for the specified **Warehouse**

The **Batch Number** can be found on the "Work Orders Created Listing" that ***ORDER POWER!*** produces when you run the **Create Work Orders from Customer Orders** option. It can also be seen in each customer order's Audit history.

Use Current Printer Defaults

Type **Y**(es) or **N**(o) to indicate whether or not you want to change the existing printer defaults for the current report.

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal, or run the report interactively which locks the terminal until the program has completed.

Y (es) indicates that the report will be submitted as a batch job

N (o) indicates that the report will be run interactively

Save Changes

Type **Y**(es) or **N**(o) to indicate whether or not you want any changes made to the defaults for the current report to be applied to all subsequent displays of this panel. This eliminates redundant data entry.

3. Press **Enter** to release **Work Orders**.

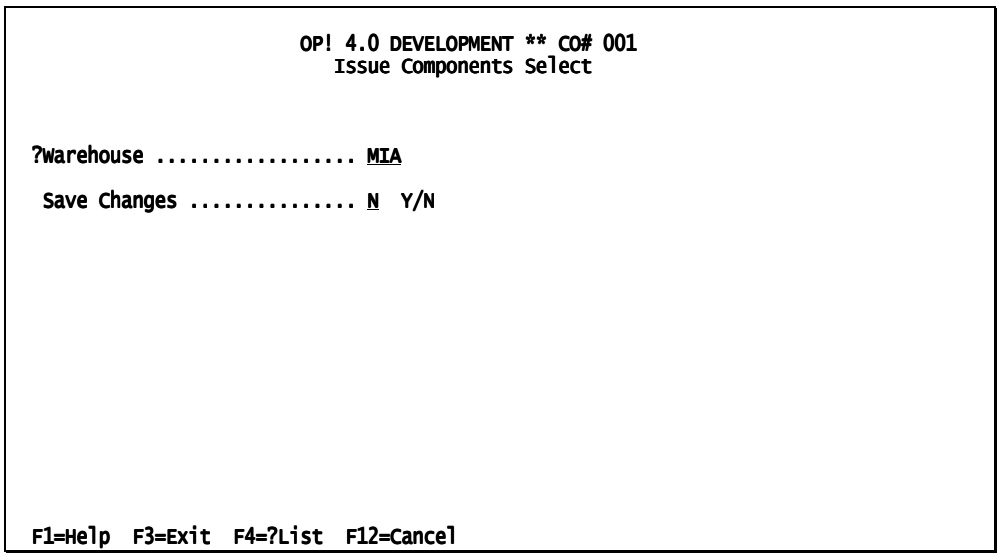
Issue Components

Items can be issued into your Warehouse's **Work In Process** location based on all the components required, or you can issue partial quantities throughout large production runs.

To issue components

This optional step issues quantities of the components on the **Manufactured Item**'s **Bill of Materials**. Components will only be issued for **Items** on **Work Orders** that you have released. Using this option allows you to move components from available inventory into a logical **Work in Process** location so that they are not available for order picking.

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Issue Components** to display *Issue Components Select panel (figure 29)*.



Issue Components Select panel (figure 29)

2. Complete these fields:

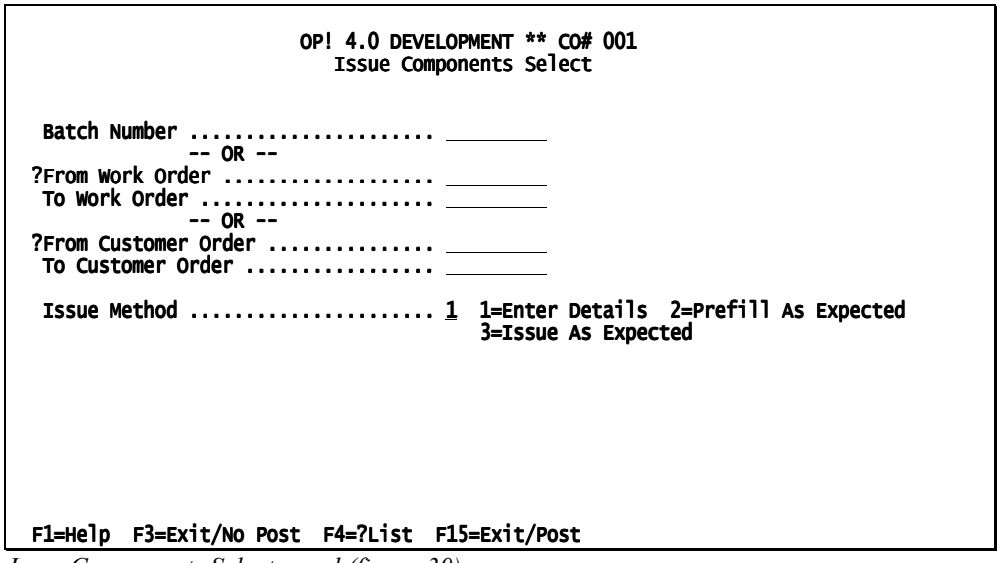
Warehouse

Type a user-defined code of the **Warehouse** for which you want to issue components.

Save Changes

Type **Y**(es) or **N**(o) to indicate whether or not you want any changes made to the display for the current panel to be applied to all subsequent displays of the panel. This eliminates redundant data entry.

3. Press **Enter** to display *Issue Components Select panel (figure 30)*.



Issue Components Select panel (figure 30)

4. Complete these fields to select **Work Orders** for which you want to issue components:

Batch Number

Type the **Batch Number** that can be found on the "Work Orders Created Listing" that ***ORDER POWER!*** produces when you run the **Create Work Orders from Customer Orders** option, or in the customer order's Audit display.

-or-

From Work Order / To Work Order

Type a range of **Work Orders** numbers.

-or-

From Customer Order / To Customer Order

Type a range of **Customer** order numbers.

5. Complete this field:

Issue Method

Type a code to indicate if you want to:

1= Enter Details - Enter quantities to issue for each component on each Work Order

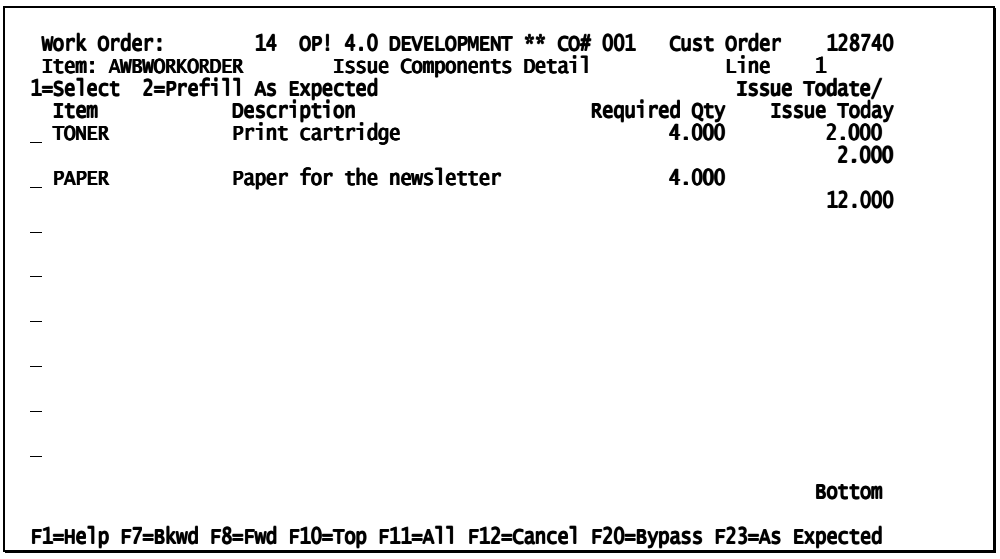
2= Prefill As Expected – Pre-fills the quantity to be issued with the quantity required by the Bill of Materials, limited to what is available to be issued from inventory, then displays the pre-filled amounts so they can be viewed and changed.

3= Issue As Expected – Issue the total quantity required by the Bill of Materials, limited to what is available to be issued from inventory.

6. Press **Enter**.

- If you typed **1** (Enter Details) or **2** (Prefill As Expected) in the **Issue Method** field, ***ORDER POWER!*** displays *Issue Components Detail panel (figure 31)*. For option **2** (Prefill As Expected), the components' from-locations will also be pre-filled based on the same logic that Customer Order Release uses for picking.

- If you typed **3** (Issue As Expected) in the **Issue Method** field, ***ORDER POWER!*** issues the total quantity required, if it is available, then redisplays the *Issue Components Select panel (figure 30)*. The quantities may still be displayed or changed by selecting **1** (Enter Details) for the work order. Press **F15** (Exit/Post) to issue the components.



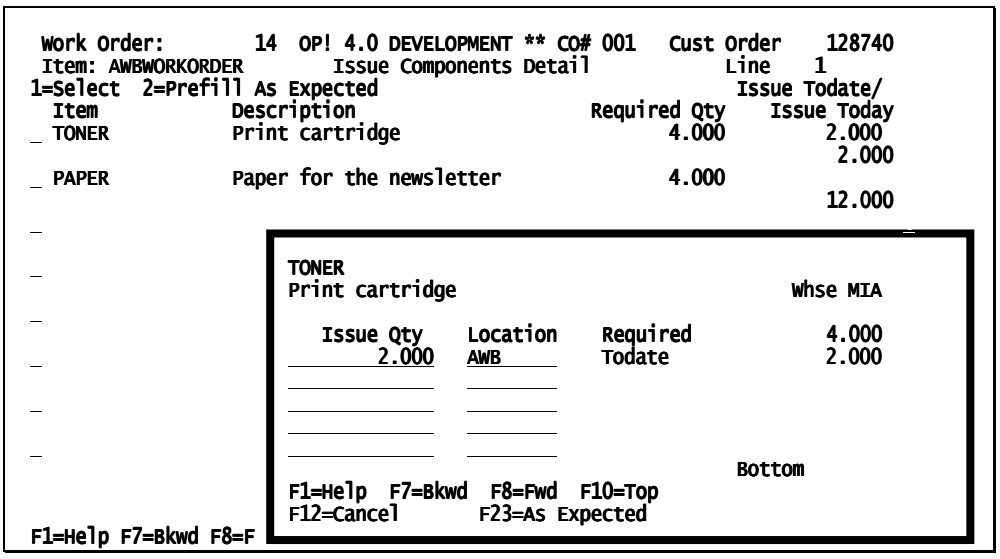
Issue Components Detail panel (figure 31)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
1=Select	Display *Issue Components Item Detail window (figure 32)* to work with quantities of components being issued
2=Prefill As Expected	Display *Issue Components Item Detail window (figure 32)* to work with quantities of components being issued. Quantities are prefilled using this option.
F11=All	Display *Issue Components Item Detail window (figure 32)* to work with quantities of components being issued for every **Item** on the displayed list
F20=Bypass	Skips to the next **Work Order (if** you have selected more than one) **without issuing anything**,
F23=As Expected	Issues components that are required (per the **Bill of Materials**) for the **Work Order**

To work with quantities of components being issued

1. On *Issue Components Detail panel (figure 31)*, type **1** (Select) beside each component you want to work with, then press **Enter** to display *Issue Components Item Detail window (figure 32)*.



Issue Components Item Detail window (figure 32)

2. Complete these fields:

Issue Qty

Type the quantity of the **Materials Item** you want to issue to this **Work Order**.

Location

Type the location from which you want these **Items** to be picked. If left blank, picking logic will be used to automatically determine the location(s) from which the component should be picked.

3. Press **Enter** to issue the **Materials Item** to this **Work Order**.

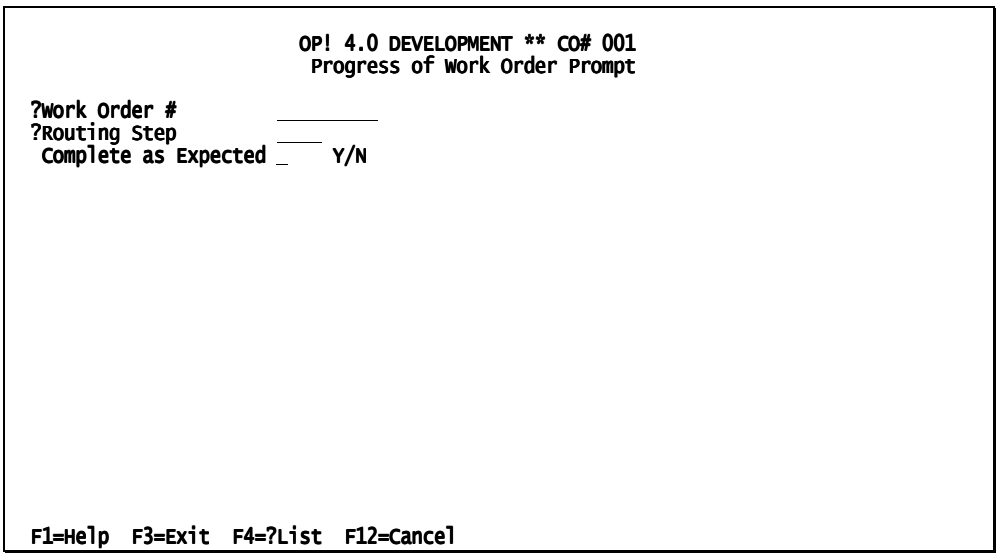
4. Press **F15** (Exit/Post) to issue the components. This will create and post a batch of inventory transactions, using **Inventory Effect Code 031** "Issue To/From WIP" to transfer the components from their designated locations to the WIP location. A pick ticket will print which can be used to physically pick the components.

Enter Progress of Work Order

Use this optional step to record the progress of a **Work Order** through its routing steps, so that information is available to other ***ORDER POWER!*** users.

To enter progress of a Work Order

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Enter Progress of Work Order** to display the *Progress of Work Order Prompt panel (figure 33)*.



Progress of Work Order Prompt panel (figure 33)

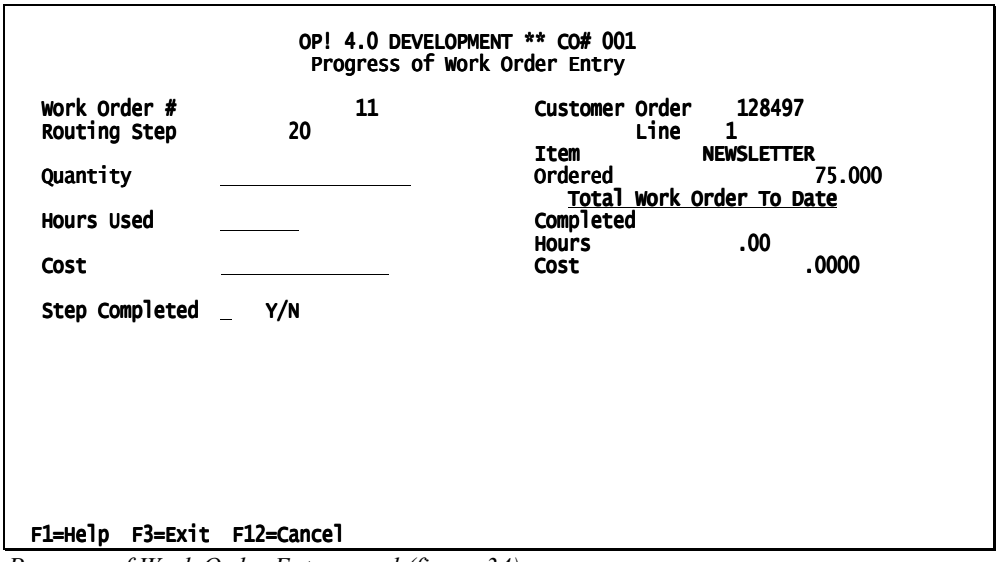
2. Complete these fields to select the **Work Order / Routing Step** for which you want to record progress:

   Work Order #
   Type the **Work Order** number.

   Routing Step
   Type the **Routing Step** number which was been fully or partly completed.

   Complete as Expected
   Type **Y**(es) or **N**(o) to indicate whether all quantities of the parent item have been completed at this routing step. This will pre-fill the following panel with the expected parent quantity and completion flag.

3. Press **Enter**. ***ORDER POWER!*** displays *Progress of Work Order Entry panel (figure 34)*.



Progress of Work Order Entry panel (figure 34)

4. Complete these fields:

Quantity
Type the quantity of the Manufactured item which has completed this routing step. If an error is made, quantities may be reversed by entering a minus sign after the quantity (for example, 10-).

Hours Used (optional)
Type the number of hours used in completing this step.

Cost
Type the cost of completing this step. You can use this field to capture miscellaneous manufacturing costs and subcontracting costs incurred in the manufacturing process. These costs are not used for accounting in the General Ledger.

Step Completed
Type **Y**(es) or **N**(o) to indicate if this step is complete. A previously completed routing step will default to **Y**, but the step may be re-opened with an **N**.

5. Press **Enter** to update the step.

Recording Finished Goods

Use this option to transfer finished **Items** to their eventual inventory locations. **Component Items** which are not used can be transferred back to inventory, or they can be scrapped.

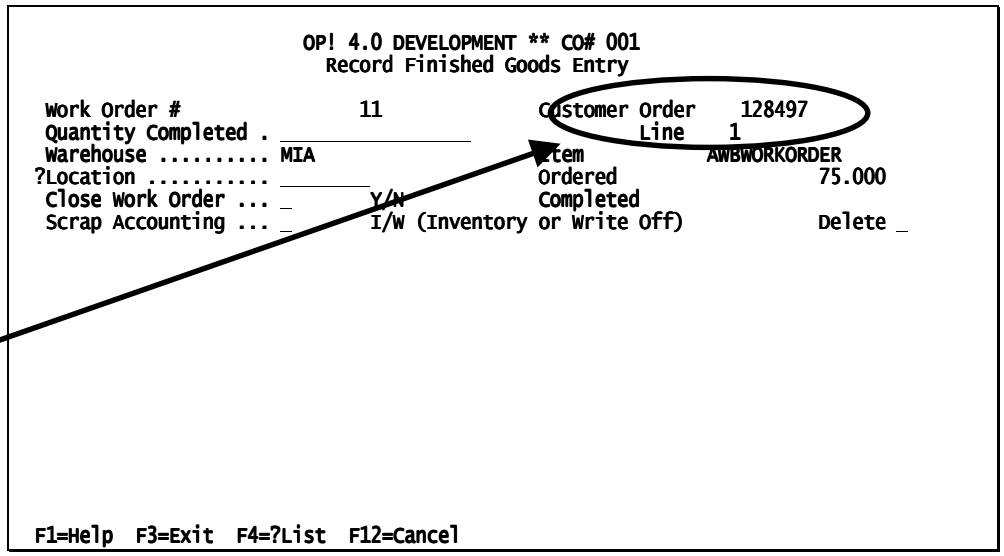
To record finished goods

This step is required to create the appropriate inventory transactions when items have been completed in a **Work Order**. You can also close the **Work Order** using this option.

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Record Finished Goods** to display *Record Finished Goods Prompt panel (figure 35)*.

Record Finished Goods Prompt panel (figure 35)

2. In the **Work Order #** field, type the number of the **Work Order** you want to work with, then press **Enter** to display the *Record Finished Goods Entry panel (figure 36)*.



The **Customer Order** and **Line** number fields display only for **Make-to-Order Items**.

Record Finished Goods Entry panel (figure 36)

3. Complete these fields:

Quantity Completed
Type the quantity of the **Manufactured Item** that has been completed.

Location
Type the **Location** within the displayed **Warehouse** where you want the new inventory to be stored.

Close Work Order
Type **Y**(es) or **N**(o) to indicate whether or not you want to close the selected **Work Order**.

Scrap Accounting
Type **I**(nventory) or **W**(riteoff) to indicate how you want ***ORDER POWER!*** to account for **Component items** that were issued to this **Work Order**, but not actually used in a finished product. This field is for accounting purposes (average cost of the **Manufactured Item**) and either returns excess components to inventory with **Inventory Effect Code 031** (Issue to/from WIP) or scraps them with **Inventory Effect Code 034** (Work Order Scrap).

4. Press **Enter** to display the **Items** required, issued and used on *Record Finished Goods Detail panel (figure 37)*.

```
                    OP! 4.0 DEVELOPMENT ** CO# 001
                      Record Finished Goods Detail

 Work Order #              35                  Ordered            7.000
 Quantity Completed .          2.000           Completed          5.000
 Warehouse .......... MIA
 Location ........... AWB
 Close Work Order ... Y      Y/N
 Scrap Accounting ... W      I/W (Inventory or Write Off)
1=Select
   Seq Item                 Required          Issued             Used
_   10 PEN                    14.000          14.000            4.000
_   20 INK                    35.000          35.000           10.000

                                                                Bottom
 F1=Help  F7=Bkwd  F8=Fwd  F10=Top  F11=All  F12=Cancel  F18=Bot
```

Record Finished Goods Detail panel (figure 37)

5. If the quantities required, issued and used are correct for all **Items**, press **Enter** to redisplay *Record Finished Goods Entry panel (figure 36)* to process the next **Work Order**. If this is the last one you are working with, press **F15** (Exit/Post) to display *Finished Goods Posting Confirmation window (figure 39)*.

   Otherwise, if the quantities displayed are not all correct (such as if you did not issue **Material Items** before production), you can:

   - Type **1** (Select) beside each **Item** whose quantities you want to adjust

- or -

   - Press **F11** (All) to select all the **Items**

   then press **Enter** to display *Finished Goods Disposition window (figure 38)*.

```
                    OP! 4.0 DEVELOPMENT ** CO# 001
                      Record Finished Goods Detail

 Work Order #              41                  Ordered           13.000
 Quantity Completed .         13.000           Completed
 Warehouse .......... MIA
 Location ...........
 Close Work Order ... Y      Y/N
 Scrap Accounting ... I      I/W   Seq # 010
1=Select                           PEN
   Seq Item                 Req    Test item 1
    10 PEN                    2    Required          26.000
    20 INK                    6    Issued

                                   Used ......  _________________
                                   Scrap .....  _________________
                                   Return ....  _________________
                                     ?Location  ________
                                   Backflush    _________________
                                     ?Location  ________

                                   F1=Help  F4=?List  F12=Cancel
 F1=Help  F7=Bkwd  F8=Fwd  F10=Top
```

Finished Goods Disposition window (figure 38)

6. Complete these fields to update the disposition of **Material Items**:

Used

Type the quantity of the **Material Item** that was used in creating the finished **Manufactured Items**. These will be removed from the WIP inventory location with **Inventory Effect Code 033** "WO Component Used."

Scrap

Type the quantity of the **Material Item** that was wasted or broken in production, and should be subtracted from Inventory. These will be removed from the WIP inventory location with **Inventory Effect Code 034** "WO Scrap."

Return

Type the quantity of the **Material Item** that was unused in production, and should be returned to Inventory. These will be moved from the WIP inventory location back into available inventory with **Inventory Effect Code 031** "Transfer Component to/from WIP".

Location

Type the inventory location to which you want the unused component returned.

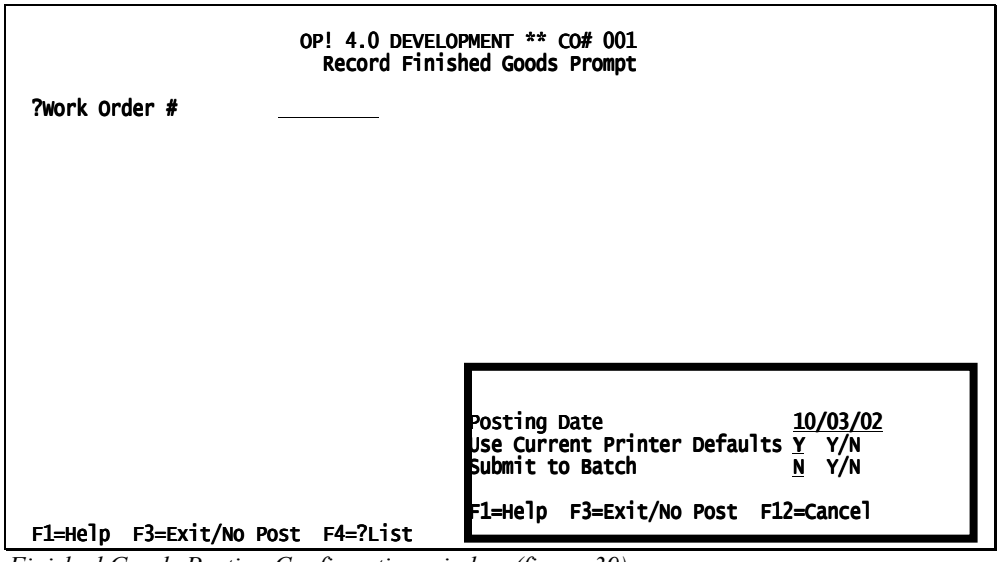
Backflush

Type the quantity of the **Material Item** that was used, but not previously moved from Inventory to WIP with the "Issue Components" menu option. This will issue the remaining required components from inventory.

Location

Type the inventory location from which you want the component backflushed.

7. Press **Enter** to display to process the next **Work Order**. If this is the last one you are working with, the *Record Finished Goods Entry panel (figure 36)* will be displayed. From there, press **F15** (Exit/Post) to display the *Finished Goods Posting Confirmation window (figure 39)*.



Finished Goods Posting Confirmation window (figure 39)

8. Complete these fields:

Posting Date
Type the date you want to appear to these transactions.

Submit to Batch
Type a code to indicate whether the posting should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal, or complete the posting interactively which locks the terminal until the posting has completed.

Y (es) indicates that the report will be submitted as a batch job
N (o) indicates that the report will be run interactively

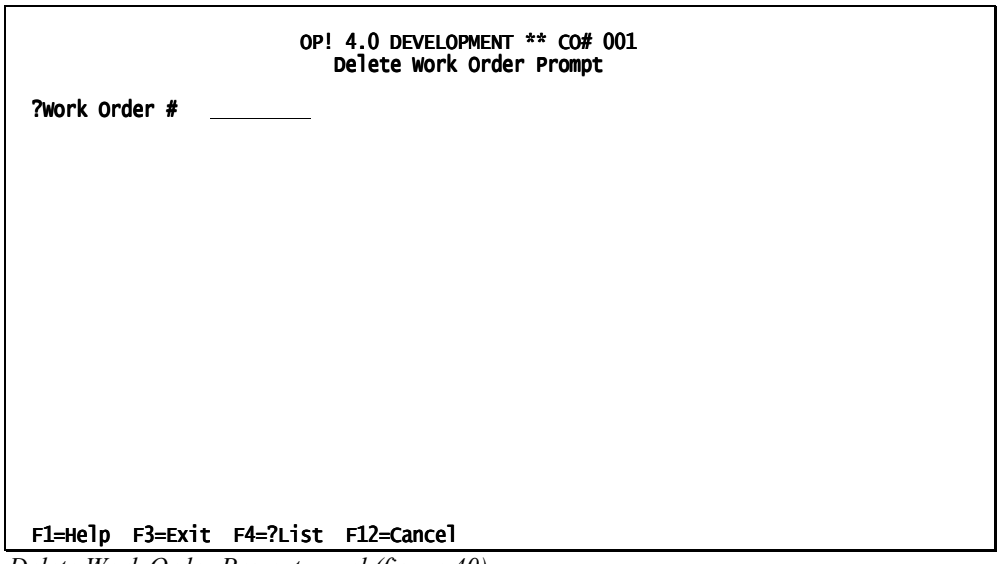
Save Changes
Type **Y**(es) or **N**(o) to indicate whether or not you want any changes made to the display for the current panel to be applied to all subsequent displays of the panel. This eliminates redundant data entry.

9. Press **Enter** to post the transactions. This will move the finished goods into available inventory, using **Inventory Effect Code 032** "WO Receipt - Finished Good". If the work order was make-to-order, the finished product is also committed to the associated customer order.

Deleting a Work Order

Use this option to delete a Work Order. You cannot delete a Work Order if you have already issued **Material Items** or completed some or all of the **Manufactured Items**. In that case the Work Order must be **closed** with the **Record Finished Goods** option (even if no finished goods were produced) instead of being deleted.

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Delete Work Order** to display the *Delete Work Order Prompt panel (figure 40)*.



Delete Work Order Prompt panel (figure 40)

2. In the **Work Order #** field, type the number of the **Work Order** that you want to delete, then press **Enter** to display the **Delete** field. If the **Work Order** was created

for a **Make-to-Order Item**, ***ORDER POWER!*** will also display the **Customer Order** and **Line** number for your reference.

3. Type **Y**(es) in the **Delete** field, then press **Enter** to delete the **Work Order**.

Work Order Inquiry & Maintenance

Use the **Work Order Inquiry & Maintenance** option to select **Work Orders** that you want to work with.

To display a list of Work Orders

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Work Order Inquiry & Maintenance** to display the *Work Order Inquiry panel (figure 41)*.

```
                          OP! 4.0 DEVELOPMENT ** CO# 001        Show Created : Y
All Orders                      Work Order Inquiry                    Active : Y
                                                                      Closed : Y
Select one of the following :                                         Deleted : Y
  Work Order #          _________
 ?Customer Order #      _________
 ?Routing Code          _________
 ?Item                  _______________
 ?Component             _______________
 ?Work Center           _______________
  Creation Date         ________
  Release Date          ________
  Est Completion Date   ________
  Batch Number          _________




 F1=Help  F3=Exit  F4=?List  F12=Cancel
```

Work Order Inquiry panel (figure 41)

2. Complete one of these fields to select **Work Orders** for display, or just press **Enter** to display all **Work Orders**:

You can further refine your search by typing **Y**(es) or **N**(o) in the fields at the upper right side of the panel to indicate whether or not you want to see **Created**, **Active**, **Closed**, and/or **Deleted Work Orders**.

Work Order #

Type a **Work Order** number to display a list of **Work Orders**, sorted by **Work Order** number, starting at that number.

Customer Order #

Type a **Customer Order** number to display a list of **Work Orders** created based on the specified order.

Routing Code

Type a **Routing Code** to display a list of **Work Orders** that use the specified code.

Item

Type an **Item** number to display a list of **Work Orders**, sorted by **Work Order** number, created for the manufacturing of the specified **Item.**

Component

Type a **Component** number to display a list of **Work Orders** which use that component in their Bills of Materials.

Work Center

Type a **Work Center** number to display a list of **Work Orders** which use that Work Center in their routings.

Creation Date

Type a **Creation Date** to display a list of **Work Orders**, sorted by **Creation Date**, starting at that date.

Release Date

Type a **Release Date** to display a list of **Work Orders**, sorted by **Release Date**, starting at that date.

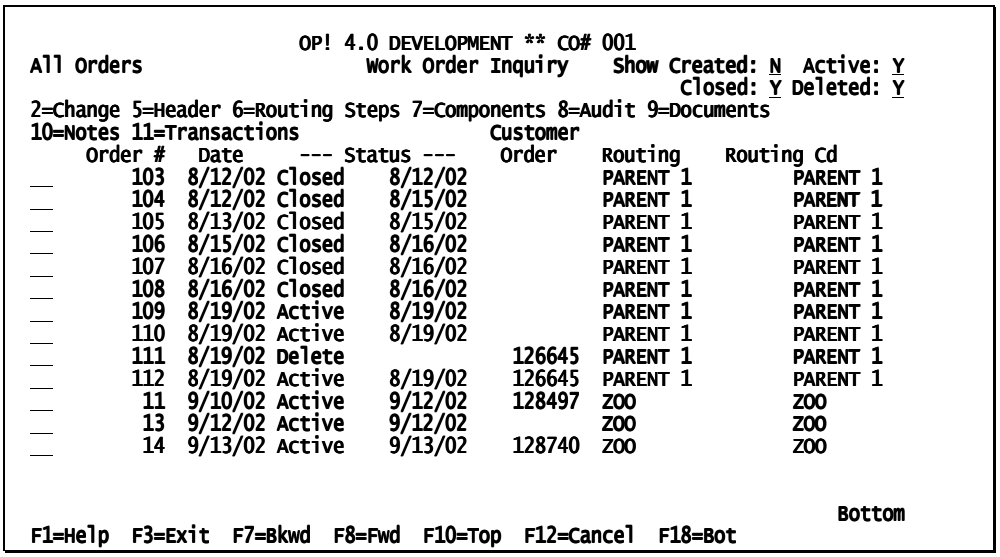
Est Completion Date

Type an **Estimated Completion Date** to display a list of **Work Orders**, sorted by **Estimated Completion Date**, starting at that date.

Batch Number

Type a **Work Order** Batch Number to display a list of **Make-to-Order Work Orders**, sorted by **Estimated Completion Date** within the selected batch.

3. Press **Enter** to display *Work Order Inquiry panel (figure 42)*. The display fields vary depending on which field you use for selection, as described above.



```
                    OP! 4.0 DEVELOPMENT ** CO# 001
All Orders                Work Order Inquiry    Show Created: N  Active: Y
                                                      Closed: Y Deleted: Y
2=Change 5=Header 6=Routing Steps 7=Components 8=Audit 9=Documents
10=Notes 11=Transactions                      Customer
     Order #   Date     --- Status ---    Order    Routing    Routing Cd
__       103  8/12/02 Closed    8/12/02             PARENT 1         PARENT 1
__       104  8/12/02 Closed    8/15/02             PARENT 1         PARENT 1
__       105  8/13/02 Closed    8/15/02             PARENT 1         PARENT 1
__       106  8/15/02 Closed    8/16/02             PARENT 1         PARENT 1
__       107  8/16/02 Closed    8/16/02             PARENT 1         PARENT 1
__       108  8/16/02 Closed    8/16/02             PARENT 1         PARENT 1
__       109  8/19/02 Active    8/19/02             PARENT 1         PARENT 1
__       110  8/19/02 Active    8/19/02             PARENT 1         PARENT 1
__       111  8/19/02 Delete                 126645  PARENT 1         PARENT 1
__       112  8/19/02 Active    8/19/02     126645  PARENT 1         PARENT 1
__        11  9/10/02 Active    9/12/02     128497  ZOO              ZOO
__        13  9/12/02 Active    9/12/02             ZOO              ZOO
__        14  9/13/02 Active    9/13/02     128740  ZOO              ZOO


                                                                      Bottom
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F10=Top  F12=Cancel  F18=Bot
```

Work Order Inquiry panel (figure 42)

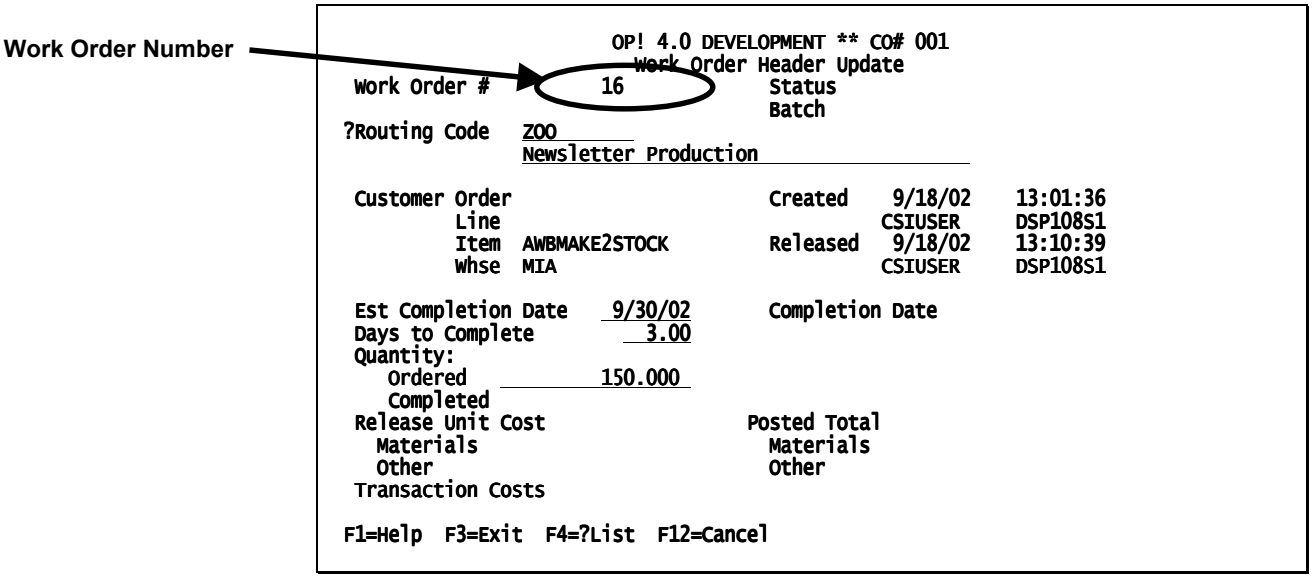
These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Work Order Header Update panel (figure 43)* to work with an existing **Work Order**
5=Header	Display the *Work Order Header Display* similar to *Work Order Header Update panel (figure 43)*

Action	Description
6=Routing Steps	Display the *Work Order Routing Steps Inquiry window (figure 44)* to work with **Routing Steps**
7=Components	Display *Work Order Bill of Materials Item Inquiry window (figure 47)* to work with **Manufactured Item**'s **Bill of Materials** for the selected **Work Order**
8=Audit	Display *Work Order Audit Display panel (figure 50)* to view a history of status changes to the selected Work Order
9=Documents	Display the Order Documents window Fig #??? to work with PC document files that are associated with the selected **Work Order**
10=Notes	Display the *Work Order Header Notes window* (not shown) similar to *Routing Header Notes window (figure 63)* to work with notes specific to the selected **Work Order**.
11=Transactions	Display the *Work Order Transaction Display panel (figure 58)* to view transactions that you have entered using the "Enter Progress of Work Order" option

To change a Work Order header

1. On the *Work Order Inquiry panel (figure 42)*, type **2** (Change), beside the **Work Order** you want to work with, then press **Enter** to display the *Work Order Header Update panel (figure 43)*.



Work Order Header Update panel (figure 43)

2. Update these fields with changes that will be applied to the selected **Work Order** only:

Est Completion Date

Type the estimated completion date if you want to change the displayed date. If a customer order is associated with this work order, its Scheduled Shipment date will be updated.

Days to Complete

Type the number of days that you expect production of this **Item** to last. This reflects *calendar* days, not labor.

Quantity Ordered

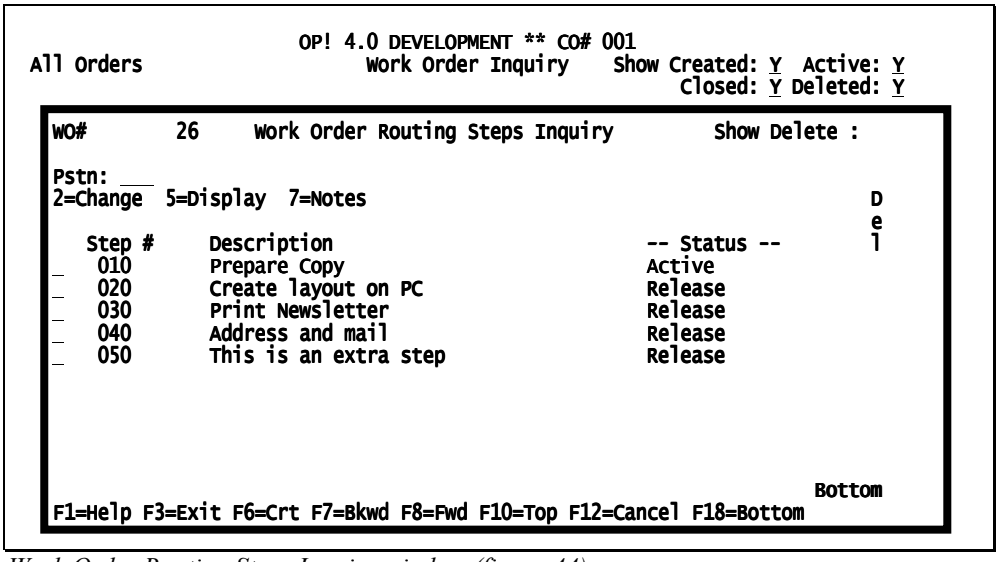
Type the quantity of the **Manufactured Item** that you want to produce on this **Work Order**.

3. Press **Enter** to update the **Work Order**.

To work with a Work Order's Routing Steps

Use this option to create or modify **Routing Steps** defined in the **Routing** code for the selected **Work Order** only.

1. On the *Work Order Inquiry panel (figure 42)*, type **6** (Routing Steps), beside the **Work Order** you want to work with, then press **Enter** to display the *Work Order Routing Steps Inquiry window (figure 44)*.



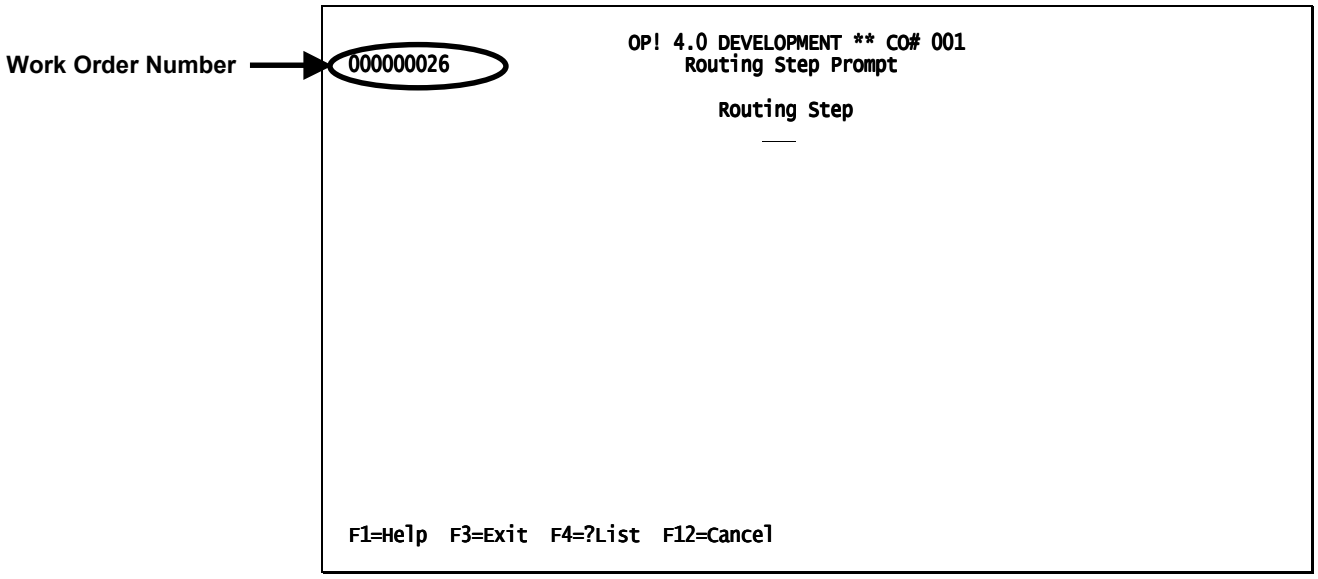
Work Order Routing Steps Inquiry window (figure 44)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Routing Step Update panel (figure 46)* to work with an existing **Routing Step**
5=Display	Display the *Routing Step Display window* similar to *Routing Step Update panel (figure 46)* to view a **Routing Step**'s set up
7=Notes	Display the *Work Order Step Notes window* (not shown) similar to *Routing Header Notes window (figure 63)* to work with notes specific to the selected **Work Order** / **Routing Step**.
F6=Create	Display the *Routing Step Prompt panel (figure 45)* to create a new **Routing Step**

To create a new Routing Step

1. On the *Work Order Routing Steps Inquiry window (figure 44)*, press **F6** (Create) to display the *Routing Step Prompt panel (figure 45)*.



Routing Step Prompt panel (figure 45)

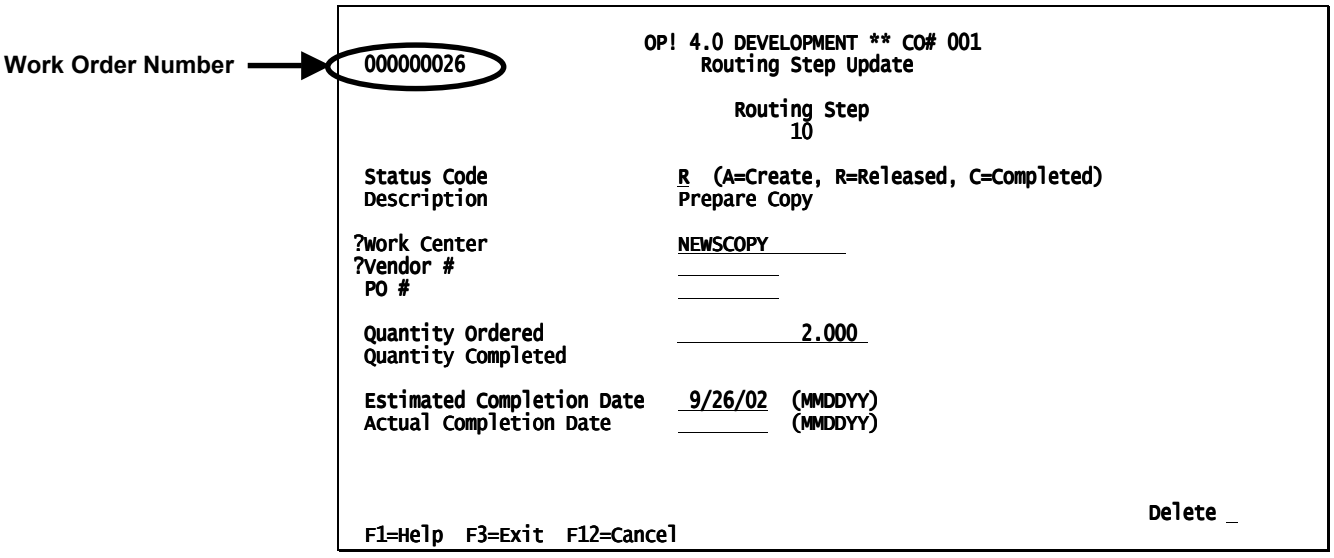
1a. Complete this field:

Routing Step
Type a number that positions this step in the manufacturing process chronologically, relative to the other steps.

1b. Press **Enter** to display the *Routing Step Update panel (figure 46)*.

To change a Routing Step

1. On the *Work Order Routing Steps Inquiry window (figure 44)*, type **2** (Change), beside the **Routing Step** you want to work with, then press **Enter** to display the *Routing Step Update panel (figure 46)*.



Routing Step Update panel (figure 46)

2. Update these fields with changes that will be applied to the selected **Work Order** only:

Status Code
Type a code to indicate the progress of this step. This is an optional field used to display the status of this work order to other Order Power! users.

(override) Description (optional)
Type an alternative description of this **Routing Step**.

Work Center
Type the **Work Center** for this **Routing Step**.

Vendor #
Type code assigned to a supplier of goods and/or services who is performing this step. This is for reference only.

PO #
Type the **Purchase Order** number used for the **Vendor** you entered above. This is for reference only.

Quantity Ordered
Type the quantity of the **Manufactured Item** that you want to produce in this **Routing Step**.

Estimated Completion Date
Type the estimated completion date of this **Routing Step**.

Actual Completion Date
Type the actual completion date of this **Routing Step**, when it occurs. This is normally done with Menu option #5 "Enter progress of Work Order", which allows more information to be captured.

3. Press **Enter** to update the **Routing Step**.

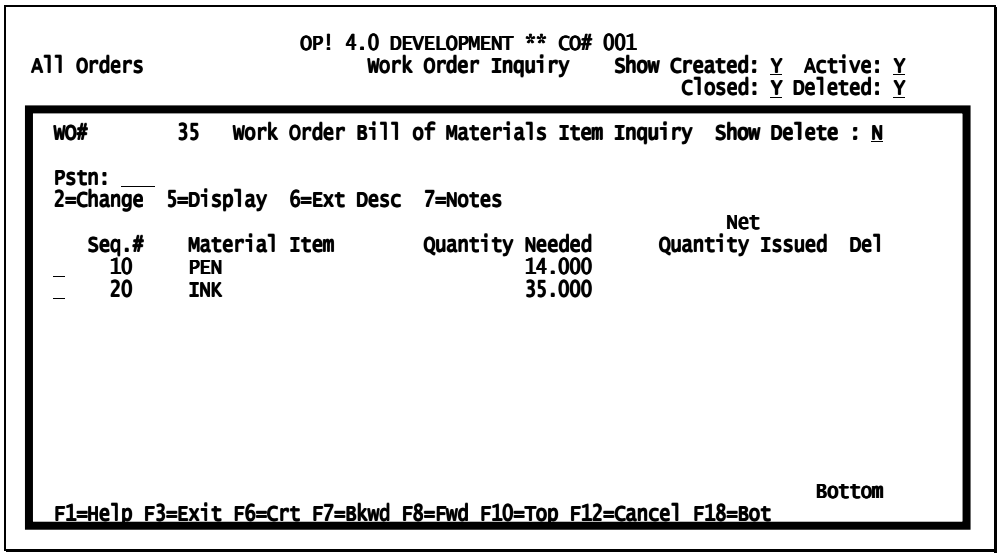
To display a Work Order's Routing Steps
On the *Work Order Routing Steps Inquiry window (figure 44)*, type **5** (Display) beside the **Routing Step** you want to see, then press **Enter** to display the *Routing Step Display window* similar to *Routing Step Update panel (figure 46)*.

To work with a Work Order's Routing Step notes
Use this option to record any additional information you want to associate with this **Routing Step** for the selected **Work Order** only.

On the *Work Order Routing Steps Inquiry window (figure 44)*, type **7** (Notes) beside the **Routing Step** you want to see, and the Routing notes are displayed. See the "Working with Work Order Notes" section on page 62 for detailed instructions.

To work with a Work Order's Bill of Materials
Use this option to modify a **Manufactured Item**'s **Bill of Materials** for the selected **Work Order** only.

1. On the *Work Order Inquiry panel (figure 42)*, type **7** (Components), beside the **Work Order** you want to work with, then press **Enter** to display the *Work Order Bill of Materials Item Inquiry window (figure 47)*.



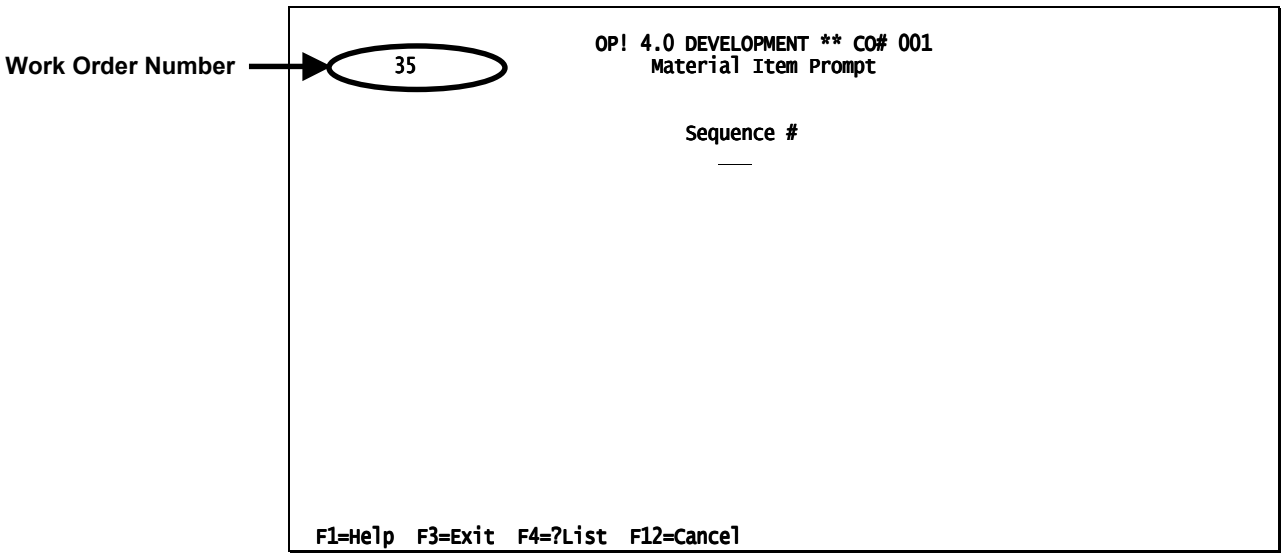
Work Order Bill of Materials Item Inquiry window (figure 47)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Material Item Update panel (figure 49)* to work with an existing **Work Order's Bill of Materials**
5=Display	Display the *Work Order's Bill of Materials Display window* similar to *Material Item Update panel (figure 49) to view a* **Work Order's Bill of Materials***'* set up
6=Ext Desc	Display the *Extended Description* ***Inquiry window*** (not shown) similar to *Routing Header Notes window (figure 63)* to work with the **Material Item**'s Extended Description specific to the selected **Work Order / Bill of Materials**.
7=Notes	Display the *Bill Of Materials Notes window* (not shown) similar to *Routing Header Notes window (figure 63)* to work with notes specific to the selected **Work Order / Bill of Materials**.
F6=Create	Display the *Material Item Prompt panel (figure 48)* to add a new **Materials Item** to a **Work Order's Bill of Materials**

To add a new Materials Item to a Work Order's Bill of Materials

1. On the *Work Order Bill of Materials Item Inquiry window (figure 47)*, press **F6** (Create) to display the *Material Item Prompt panel (figure 48)*.



Material Item Prompt panel (figure 48)

1a. Complete this field:

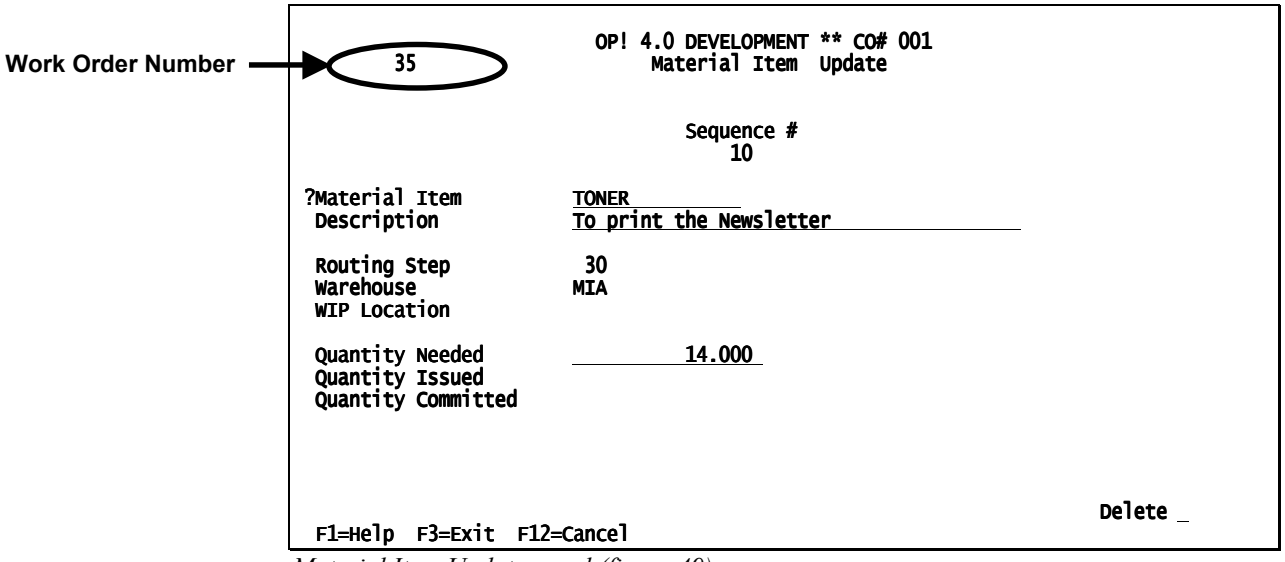
Sequence #

Type a user-defined **Sequence Number** for a component used in manufacturing. The **Sequence Number** permits you to use a single **Item** more than once in a **Bill of Materials** so that you can assign different quantities and descriptions to the same part when it is used in more than one step of the manufacturing process.

1b. Press **Enter** to display the *Material Item Update panel (figure 49)*.

To change a Work Order's Bill of Materials

1. On the *Work Order Bill of Materials Item Inquiry window (figure 47)*, type **2** (Change), beside the **Work Order's Bill of Materials** you want to work with, then press **Enter** to display the *Material Item Update panel (figure 49)*.



Material Item Update panel (figure 49)

2. Complete these fields:

Material Item
Type the **Item** number of the component you are adding to the **Bill of Materials**.

Override Description
Type a description that you want to associate with this **Material Item**, for purposes of this **Manufactured Item/Sequence Number**.

Quantity Needed
Type the quantity of this **Material Item** that you want to associate with this **Manufactured Item**, for purposes of this **Manufactured Item/Sequence Number**. You can either change or delete existing **Bill of Materials** items and quantities needed, or add new ones.

3. Press **Enter** to update the **Work Order's Bill of Materials**.

To display a Work Order's Bill of Materials

On the *Work Order Bill of Materials Item Inquiry window (figure 47)*, type **5** (Display) beside the **Work Order's Bill of Materials** you want to see, then press **Enter** to display the *Work Order's Bill of Materials Display window* similar to *Material Item Update panel (figure 49)*.

Audit (To view a history of status changes to the selected Work Order)

1. On the *Work Order Inquiry panel (figure 42)*, type **8** (Audit) beside the **Work Order** you want to see, to display the *Work Order Audit Display panel (figure 50)*.

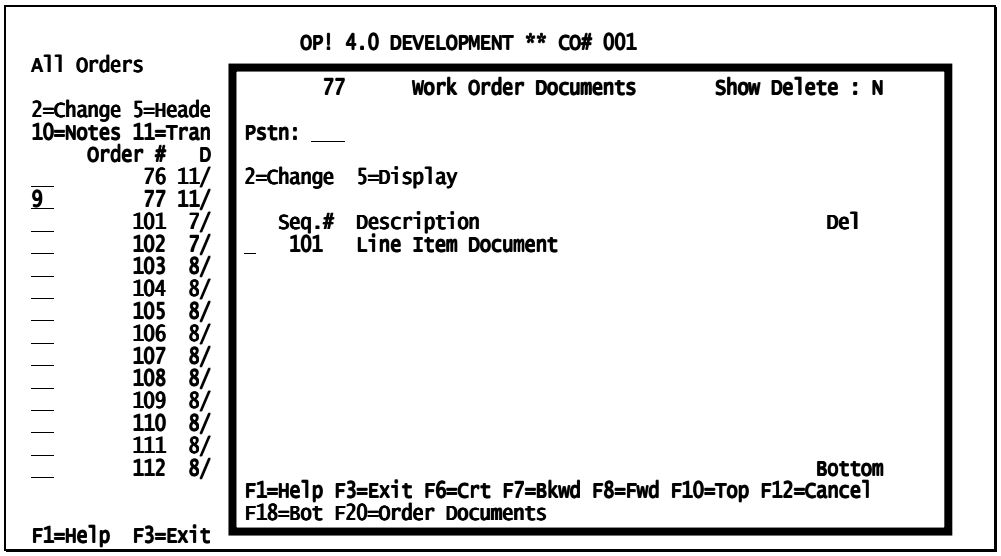
```
A   WO#        26          Work Order Audit Display          From: OLDEST
                                                               To: NEWEST
2
1   Action/Info                    Date      Time   User      Workstn
    CREATE WORK ORDER              9/19/02 13:54:50 CSIUSER   DSP108S1
8   WO01005
_
_   RELEASE WORK ORDER             9/23/02 11:01:35 CSIUSER   DSP108S1
_   WO01002
_
_
_
_
_
_
_
_
_
_                                                                Bottom
F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F12=Cancl F16=Seq F18=Bot F21=Prt
```

Work Order Audit Display panel (figure 50)

Working with a Work Order's Document References

The **Work Order** system allows you to reference any PC documents that may be relevant to the **Manufactured Item**, such as an image of a logo, a document containing assembly instructions, a color sample, or drawings of components and assemblies. These document references may also be created during Customer Order Entry for Make-to-Order items. The actual documents may be stored in the AS/400's Integrated File System, or on a PC.

1. On the *Work Order Inquiry panel (figure 42)*, type **9** (Documents) beside the **Work Order** you want to work with, to display *Work Order Documents window (figure 51)*.



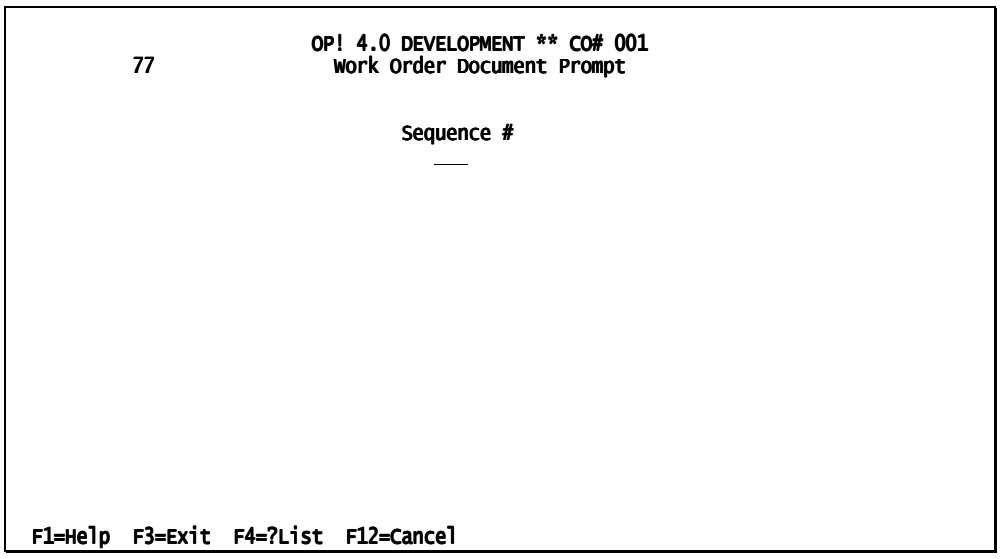
Work Order Documents window (figure 51)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Change	Display *Work Order Document Update* panel (figure 53) to work with an existing **Order Document**
5=Display	Display the *Order Document Display window* similar to *Work Order Document Update* panel (figure 53) *to view a* **Order Document***'s set up*
F6=Create	Display the *Work Order Document* Prompt panel (figure 52) to create a new **Order Document**
F20=Order Documents	Display the *Order Documents window*, similar to *Work Order Documents window (figure 51),* to work with documents that refer to the complete customer order, rather than only a single line which is the basis of the selected **Work Order**.

To create a new Work Order Document

1. On the *Work Order Documents window (figure 51)* , press **F6** (Create) to display the *Work Order Document* Prompt panel (figure 52).



Work Order Document Prompt panel (figure 52)

1a. Complete this field:

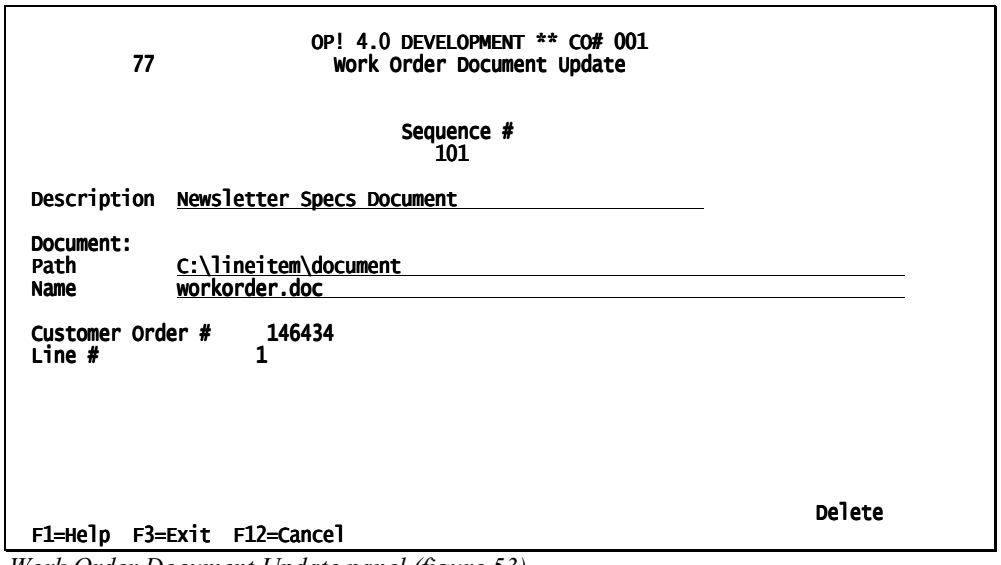
Sequence #

Type a number to indicate the display sequence, relative to the others in the same list.

1b. Press **Enter** to display the *Work Order Document Update* panel (figure 53).

To change a Work Order Document

1. On the *Work Order Documents window (figure 51)*, type **2** (Change), beside the **Order Document** you want to work with, then press **Enter** to display the *Work Order Document Update panel (figure 53)*.



Work Order Document Update panel (figure 53)

2. Complete these fields:

Description

Type a description of the **Document Reference** you are defining.

Path

Type the complete Windows path where the document is located.

Name

Type the name of the document you want this order line to reference.

3. Press **Enter** to update the **Order Document**.

To display a Work Order Document

On the *Work Order Documents window (figure 51)*, type **5** (Display) beside the **Order Document** you want to see, then press **Enter** to display the *Order Document Display window* similar to *Work Order Document Update* panel (figure 53).

Adding Work Order Document References in Order Entry

You can add **Document Reference** to either an order line, or the whole order. **Document References** created in **Order Entry** will be visible in the **Work Order** on *Work Order Documents window (figure 51)*.

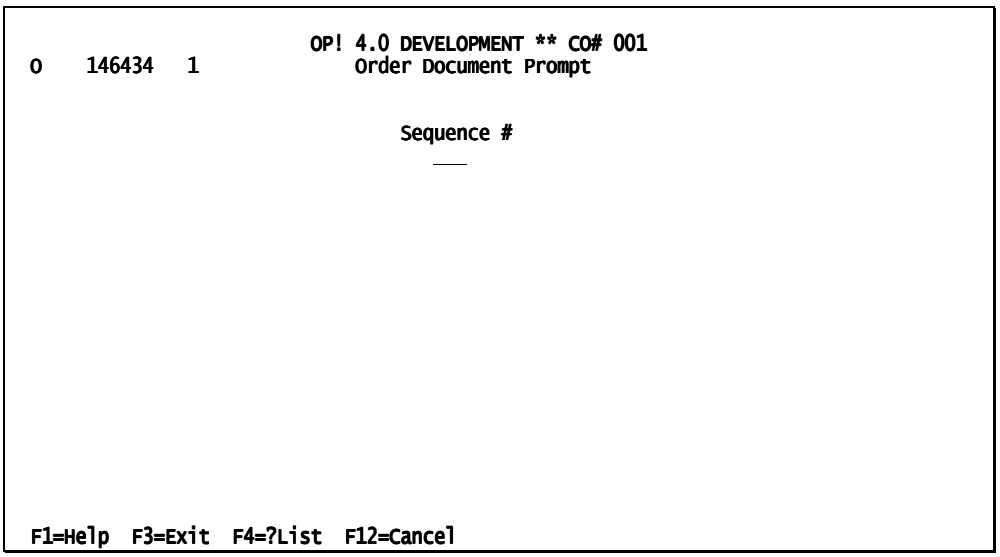
To add a Work Order Document References to a line

1. In the *Order Entry Item Selection Selected Items review mode (figure 54)*, type **11** (Documents) beside the line you want to work with, then press **Enter** to display the *Order Documents Inquiry window*.

```
                        OP! 4.0 DEVELOPMENT ** CO# 001
Order #       146434      Order Entry Item Selection       Limit
Customer #      9473                                        Used    152450.17
CSI's Favorite Customer                                     Mdse         2.95
------------------------------- Selected Items ------------------------------
2=Change  4=Delete  5=Pricing  6=Extended Description  7=Line Item Notes
8=View Personalization  9=Line Additional Information  10=Kit  11=Documents
          Quantity  Item         Description                        Price   U/M
11           1.000  AWBWORKORDER Make2Order Item - Newslett       2.9500
__
__
__
__
__
__
__                                                                      Bottom
 ------------------------------- Select Item --------------------------------
?Item / Search Words      Quantity     ?Price   N/C ?Ship To ?via ?whs Shp.Date
                             1.000              N      9473 UPG  MIA 11/15/02
 F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F12=Cancel  F13=Header  F14=Cust Notes
 F15=Orders        F16=Cust Info                F17=AR      F18=Header Notes
 F20=Totals        F21=Fold                     F22=Delete  F23=Entry
```

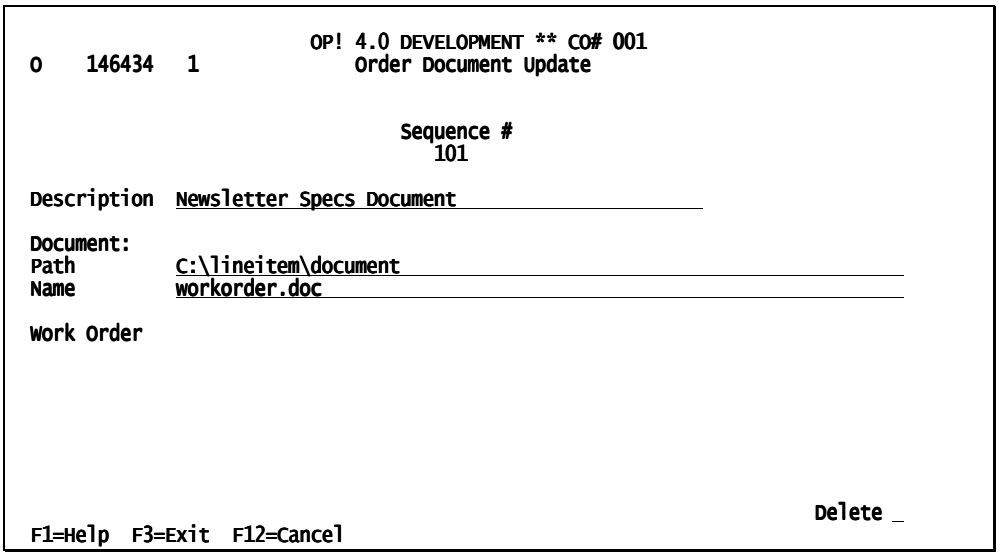
Order Entry Item Selection Selected Items review mode (figure 54)

2. On the *Order Documents Inquiry window*, press **F6** (Crt) to display *Order Document Prompt panel (figure 55)*.



Order Document Prompt panel (figure 55)

3. In the **Sequence #** field, type a number to indicate the display sequence, relative to the others in the same list, then press **Enter** to display *Order Document Update panel (figure 56)*.



Order Document Update panel (figure 56)

4. Complete these fields:

Description
Type a description of the **Document Reference** you are defining.

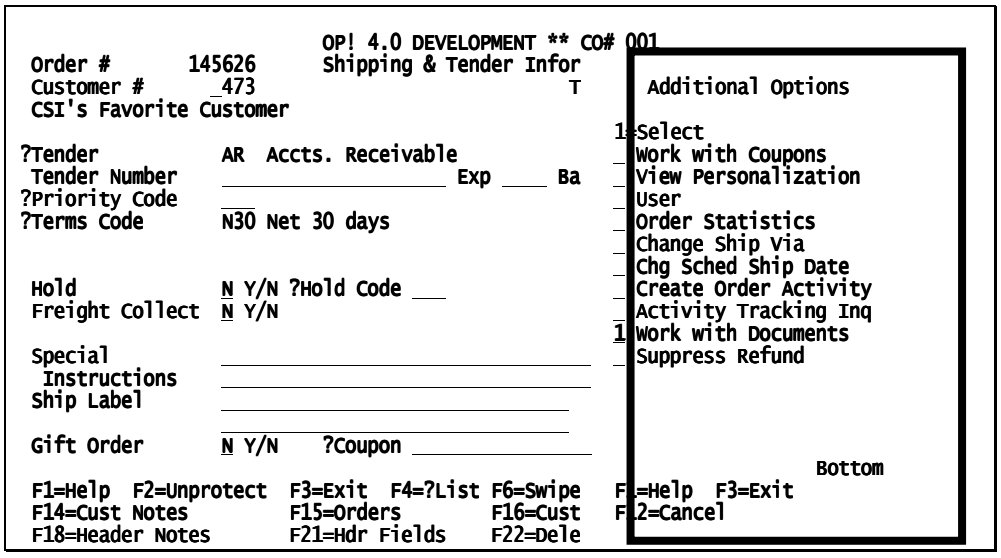
Path
Type the complete Windows path where the document is located.

Name
Type the name of the document you want this order line to reference.

5. Press **Enter** to update the **Document Reference**. This reference will appear on *Work Order Documents window (figure 51)*.

To add a Work Order Document References to a customer order

1. In the *Order Entry Shipping & Tender Information panel*, press **F24** (More Opt) to display the *Order Entry Shipping & Tender Additional Options window (figure 57)*.



Order Entry Shipping & Tender Additional Options window (figure 57)

2. Type **1** (Select) beside the **Work with Documents** option, then press **Enter** to display *Order Document Prompt panel (figure 55)*.

3. In the **Sequence #** field, type a number to indicate the display sequence, relative to the others in the same list, then press **Enter** to display *Order Document Update panel (figure 56)*.

4. Complete these fields:

Description
Type a description of the **Document Reference** you are defining.

Path
Type the complete Windows path where the document is located.

Name
Type the name of the correspondence document you want this order line to reference.

5. Press **Enter** to update the **Document Reference**.

To work with Work Order Header Notes

Work Order Header Notes are used to record any additional textual information which is not contained in a separate document (see Work Order Documents), which you want to associate with this **Work Order**. See "Working with Work Order Notes" section on page 62 for detailed instructions.

Transactions (To view the progress of the selected Work Order)

1. On the *Work Order Inquiry panel (figure 42)*, type **11** (Transactions) beside the **Work Order** you want to see, then press **Enter** to display the *Work Order Transaction*

Display panel (figure 58). This displays the transactions which were entered using the menu option "Enter progress of Work Order".

```
WO#        26      Work Order Transaction Display          From: OLDEST
Pstn : ___                                                   To: NEWEST
5=Display
  Step        Quantity   Hours          Cost  Complete   Date     Time
_  20           1.000    1.00        1.0000       N     _/25/02 13:2_:38
                                                                  Bottom
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F10=Top  F12=Cancel  F16=Seq
F17=By Date      F18=Bot  F21=Print
```

Work Order Transaction Display panel (figure 58)

To print the Work Order Package

Use this option to print **Specifications**, **Bills of Materials**, and **Progress Reports** for each **Routing Step** on selected **Work Orders**.

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Print Work Order Package** to display the *Work Order Document Package panel (figure 59)*.

```
                    OP! 4.0 DEVELOPMENT ** CO# 001
                     Work Order Document Package



Work Order Number.............  1          1=All      2=Select    3=Range
Work Order Status.............  1          1=All      2=Select
Print Bill of Materials.......  Y          Y/N
Print Routing Steps...........  Y          Y/N

Use Current Printer Defaults..  Y          Y/N
Submit to Batch...............  N          Y/N
Save Changes..................  N          Y/N




F1=Help  F3=Exit  F12=Cancel
```

Work Order Document Package panel (figure 59)

2. Complete these fields to select **Work Orders** for which you want to print documents:

Work Order Number

Type a code to indicate if you want to print documents for:

1 All **Work Orders**
2 Specific **Work Orders**
3 A specified range of **Work Orders** only

Work Order Status

1 All statuses
2 Specified statuses

Print Bill of Materials

Type **Y**(es) or **N**(o) to indicate whether or not you want to print **Bills of Materials**.

Print Routing Steps

Type **Y**(es) or **N**(o) to indicate whether or not you want to print **Routing Steps**.

Use Current Printer Defaults

Type **Y**(es) or **N**(o) to indicate whether or not you want to change the existing printer defaults for the current report.

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal, or run the report interactively which locks the terminal until the report has completed.

Y (es) indicates that the report will be submitted as a batch job
N (o) indicates that the report will be run interactively

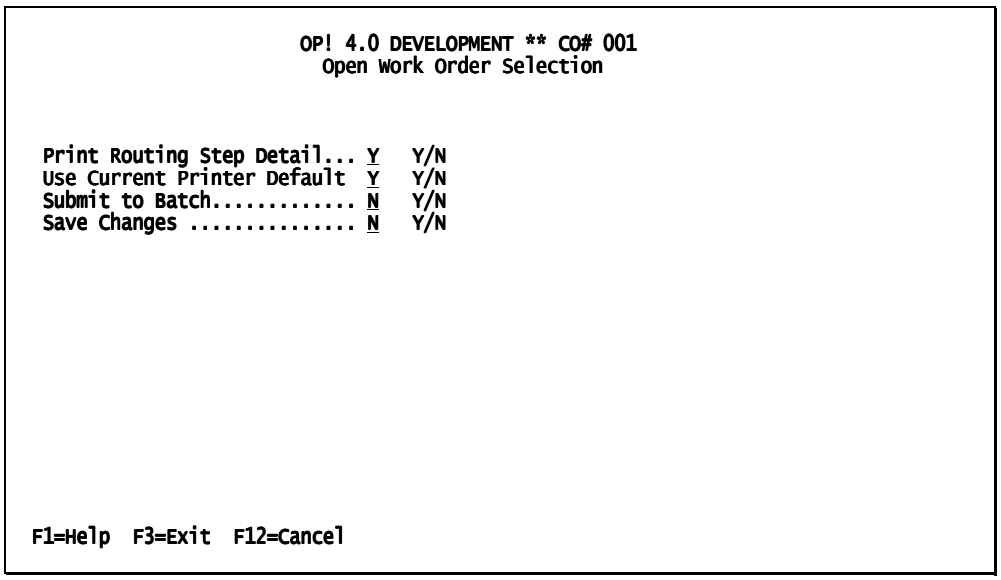
Save Changes

Type **Y**(es) or **N**(o) to indicate whether or not you want any changes made to the defaults for the current report to be applied to all subsequent printings of ***that report***. This eliminates redundant data entry.

3. Press **Enter** to process the reports.

To print an Open Work Order Listing

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Open Work Order Listing** to display the *Open Work Order Selection panel (figure 60)*.



Open Work Order Selection panel (figure 60)

2. Complete these fields to select **Work Orders** for which you want to print an **Open Work Order Listing**:

Print Routing Step Detail

Type **Y**(es) or **N**(o) to indicate whether or not you want to print **Routing Step Details**.

Use Current Printer Defaults

Type **Y**(es) or **N**(o) to indicate whether or not you want to change the existing printer defaults for the current report.

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal, or run the report interactively which locks the terminal until the report has completed.

Y (es) indicates that the report will be submitted as a batch job
N (o) indicates that the report will be run interactively

Save Changes

Type **Y**(es) or **N**(o) to indicate whether or not you want any changes made to the defaults for the current report to be applied to all subsequent printings of ***that report***. This eliminates redundant data entry.

3. Press **Enter** to process the report.

Component Availability Inquiry

Use the **Component Availability Inquiry** option to view:

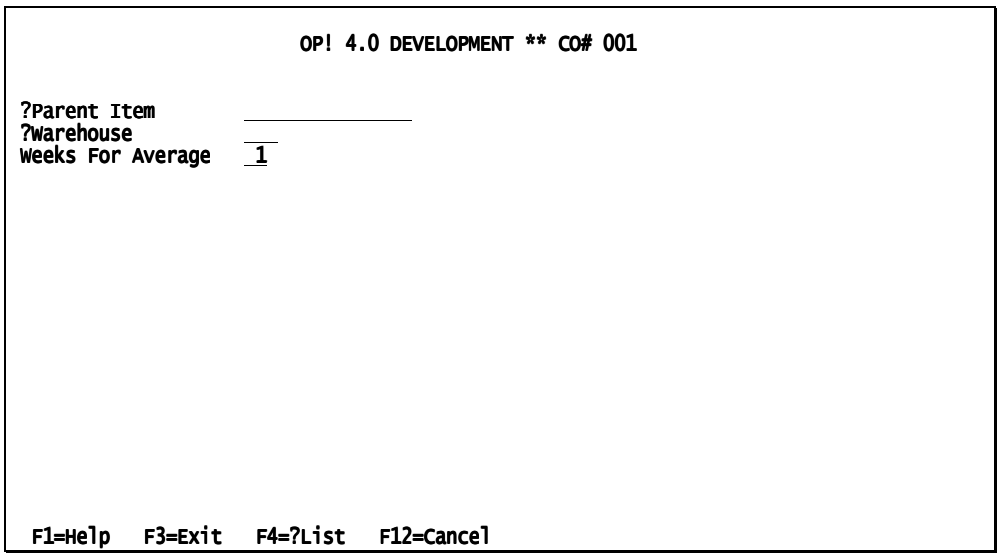
- Quantities on-hand of the parent item.
- Quantities of each Component required per Parent item and their availability.
- Quantities possible for production, based on component inventory available

- Quantities of components expected from your suppliers

To view Component availability

Use this option to view and calculate the number of **Material Items** required finish a specified quantity of a **Manufactured Item**.

1. On the *ORDER POWER! Work Orders menu (figure 24)*, select **Component Availability Inquiry** to display the *Component Availability Inquiry panel (figure 61)*.



Component Availability Inquiry panel (figure 61)

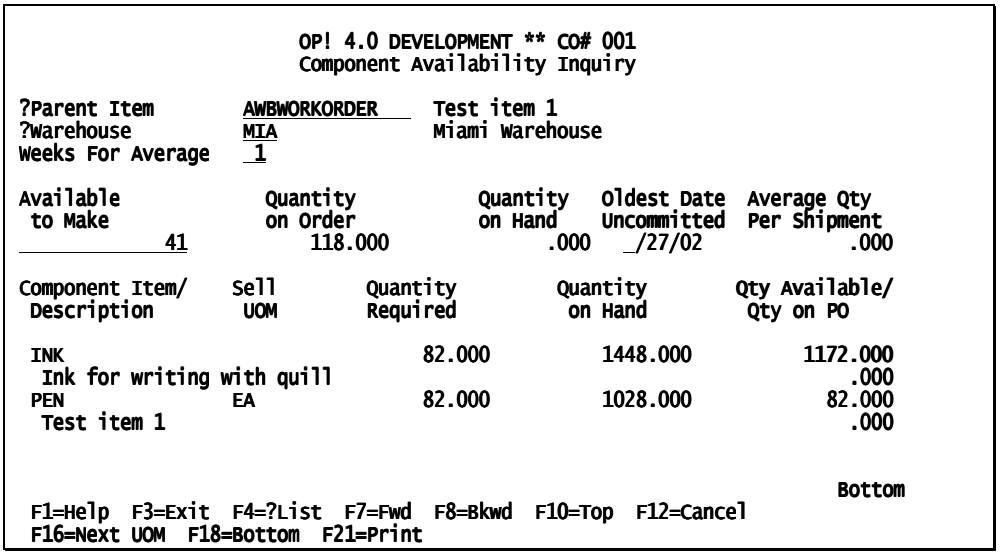
2. Complete these fields:

Parent Item
Type the user-defined code of a **Manufactured Item** you want to inquire on.

Warehouse
Type the user-defined code the **Warehouse** for this **Item** you want to inquire on.

Weeks For Average
Type the number of weeks you want ***ORDER POWER!*** to use in calculating the **Average Qty Per Shipment** field on the *Component Availability Inquiry panel (figure 62)*.

3. Press **Enter** to display *Component Availability Inquiry panel (figure 62)*.



Component Availability Inquiry panel (figure 62)

The **Available to Make** initially displays the maximum quantity which could be made with the currently available quantity of **Component Items**. You can change the quantity in this field, then press **Enter** to calculate quantities of **Component Items** that would be needed.

Working with Work Order Notes

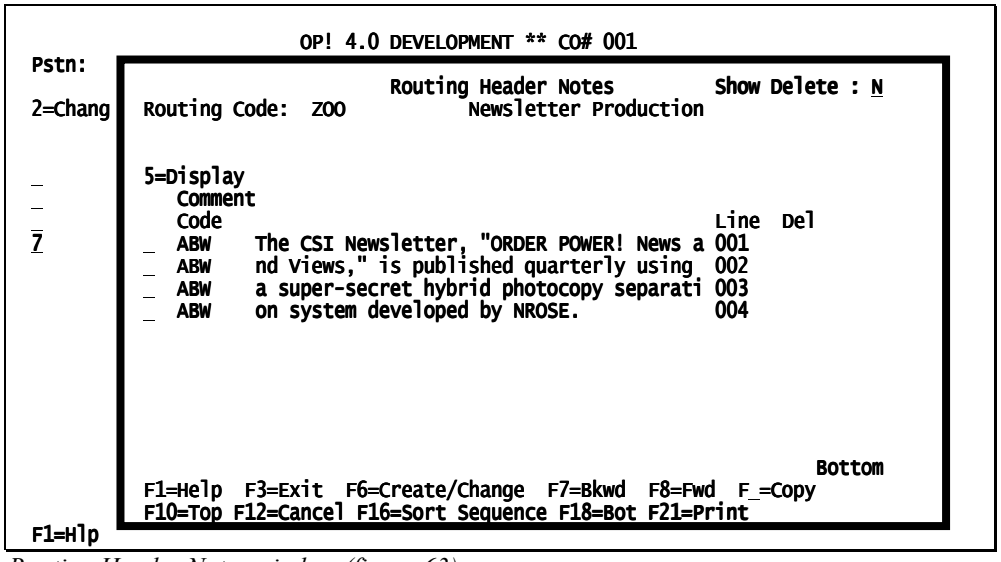
Work Order Notes are used to record any additional information you want to associate with a **Work Order**, **Routing code**, **Routing Step** or **Bill of Materials**.

Notes which are attached to the **Routing Codes** and **Routing Steps** in the routing master file are copied at **Work Order** creation to the **Work Orders** which use that **Routing Code**. This is true of **Routing** notes only. These notes are commonly used for instructions to the shop floor.

The following example describes a procedure for working with **Routing Code Notes**, but also applies to other **Work Order Notes**.

To work with Routing code Notes

1. On the *Routing Header Master Inquiry panel (figure 5)*, type **7** (Notes) to display *Routing Header Notes window (figure 63)*.



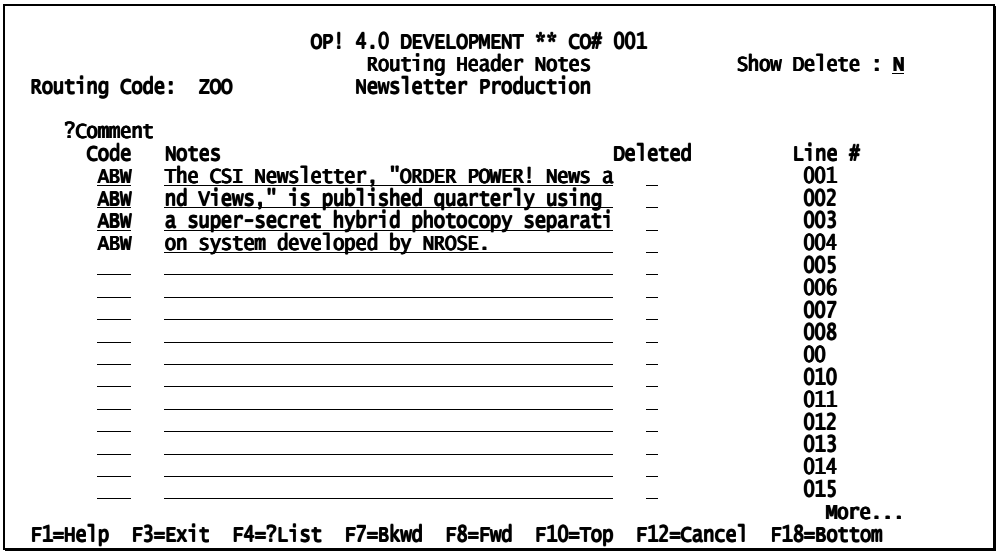
Routing Header Notes window (figure 63)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
F6=Create/Change	Display *Routing Header Notes panel (figure 64)* to work with the **Routing Header Notes**
F16=Sort Sequence F16=Line Sequence	Toggles the display between sorting on the **Comment Code** and sorting on the line number

To create or change Routing Header Notes

1. On the *Routing Header Notes window (figure 63)*, press **F6** (Create/Change) to display the *Routing Header Notes panel (figure 64)*.



Routing Header Notes panel (figure 64)

Each line of the **Routing Header Note** can have its own **Comment Code**. Each line can also be deleted separately.

2. Complete these fields:

?Comment Code

Type a user-defined code that you want to assign to a line of notes. The code indicates if you want to print the line of notes on Work Order documents or Work Order pick tickets.

Notes

Type additional information. You can use as many lines as necessary.

Deleted

Type **D**(elete) beside the line(s) you want to delete.

3. Press **Enter** to update the **Routing Header Notes**.