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• Is the information clearly presented?
• Do you need more information? If so, where?
• Are the examples correct? Do you need more examples?
• What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the topic, chapter, and page number below:

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Thank you for helping us improve our documentation.
Welcome to the Oracle® Process Manufacturing Process Operation Controls.

This user’s guide includes the information you need to work with Oracle Process Manufacturing (OPM) POC effectively.

This preface explains how this user’s guide is organized and introduces other sources of information that can help you.

About Oracle® Process Manufacturing Process Operation Controls

This guide contains overviews as well as task and reference information about Oracle® Process Manufacturing Process Operation Controls. This guide includes the following chapters:

- POC Overview
- POC Prerequisites
- POC Setup Screens
- POC Processing Forms

Audience for Oracle® Process Manufacturing POC

This guide assumes that you have a working knowledge of your business area’s processes and tools. It also assumes that you are familiar with OPM POC. If you have never used OPM POC, we suggest you attend one or more of the Oracle Process Manufacturing training classes available through World Wide Education. For more information about OPM POC and Oracle training see Other Information Sources.

This guide also assumes that you are familiar with the Oracle Applications graphical user interface. To learn more about Oracle Applications graphical user interface, read the Oracle Applications User’s Guide.
Conventions

Bolded Text
Buttons, fields, keys, menus, and selections are bolded in procedures only. For example: To access the next form click OK. Otherwise, references to these features appear in regular type.

Additional Menu Options
Only nonstandard menu options are discussed. Standard menu bar options (such as Save) are not discussed. These standard options are described in the Oracle Applications User’s Guide. Only menu options unique to the use of the specific form are discussed.

Field References
References to fields within procedures are in bold type. References within the body of this guide appear in regular type.

Keyboard Mapping
Some keyboards have an Enter key, while some have Return key. All references to this key appear as Enter.

Required Fields
The word "Required" appears as the last word in the field descriptions of all required fields. When the field is required contingent on the entry in another field, or only in specific situations, "Required if..." is the last sentence of the field description.

Fields Reserved for Future Use
Fields with no current processing implications are referenced by the statement, "This field is not currently used" or "Reserved for future use" is shown. Do not use these fields for your own reference data, because there are plans to link future functionality to these fields. Fields intended for informational use only are referenced by the statement, "This field is for informational purposes only".

Pending/Completed Transactions
Discussions about processing transactions that use the words ‘pending’ and ‘completed’ refer to the status of a transaction. Pending and completed do not refer to the database tables that are updated as a result of transactions (for example, some completed transactions are stored in the Pending Transactions table).
Procedures
Each chapter contains a procedure with numbered steps. Any actions which are subordinate to a step are assigned letters.

Note: You can customize your Oracle Application, therefore, all procedures are suggestive only. Navigate to forms and between responsibilities in a way that works best for your particular setup. Also note that fields may appear on your screen in a different order than they are discussed in this guide.

Oracle Process Manufacturing Glossaries
A module-specific glossary is included.

Use of Word "Character"
The word "character" means an alphanumeric character. Characters that are numeric or alphabetic only are referenced specifically.

Note: Depending on your system security profile, you may not have access to all of the forms and functions described in this guide. If you do not see a menu option described in this guide, and you want access to it, contact your System Administrator.
Do Not Use Database Tools to Modify Oracle Applications Data

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. If you modify the Oracle Applications data using anything other than Oracle Applications, you could change a row in one table without making corresponding changes in related tables. If your tables are synchronized with each other, you risk retrieving erroneous information and receiving unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also track who changes information. If you enter information into database tables using database tools, you could store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Consequently, we strongly recommend that you never use SQL*Plus or any other tool to modify Oracle Applications data unless otherwise instructed by Oracle Support Services.

Information Sources Related Oracle® Process Manufacturing Process Operation Controls

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding Oracle® Process Manufacturing Process Operation Controls.

Online Documentation

All Oracle Applications documentation is available online on CD-ROM, except for technical reference manuals.

All user’s guides are available in HTML and paper. Technical reference manuals are available in paper only. Other documentation is available in paper and sometimes PDF format.

The content of the documentation remains the same from format to format. Slight formatting differences could occur due to publication standards, but such differences do not affect content. For example, page numbers are included in paper, but are not included in HTML.

The HTML documentation is available from all Oracle Applications windows. Each window is programmed to start your web browser and open a specific, context-sensitive section. Once any section of the HTML documentation is open, you can navigate freely throughout all Oracle Applications documentation. The HTML documentation also ships with Oracle Information Navigator (if your national language supports this


tool) which enables you to search for words and phrases throughout the documentation set.

Other Information Sources

Oracle® Process Manufacturing Process Operation Controls shares business and setup information with other Oracle products. The following Oracle Applications guides might be useful when you are setting up and using Oracle® Process Manufacturing Process Operation Controls.

- Oracle Applications User’s Guide
  This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

- Oracle Applications Flexfields Guide
  This guide provides flexfields planning, setup and reference information for the implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

- Oracle Workflow
  This guide provides information about the Oracle Workflow product. It provides guidance and assistance for automating and routing information of any type according to business rules.

- Oracle Applications System Administrators Guide
  This guide provides planning and reference information for the Oracle Applications System administrator. It contains information on how to define security, customize menus and online help text, and manage processing.

Oracle Process Manufacturing Guides

The following is a list of the documentation in each product group of OPM release 11.0.

System Administration and Technical Reference

- Oracle Process Manufacturing Implementation Guide
- Oracle Process Manufacturing Technical Reference Manuals

OPM Inventory Control

- Oracle Process Manufacturing Inventory Management User’s Guide
- Oracle Process Manufacturing Physical Inventory User’s Guide
- Oracle Process Manufacturing EC Intrastat User’s Guide
OPM Process Execution
- *Oracle Process Manufacturing Production Management User’s Guide*

OPM Product Development
- *Oracle Process Manufacturing Formula Management User’s Guide*
- *Oracle Process Manufacturing Laboratory Management User’s Guide*
- *Oracle Process Manufacturing Quality Management User’s Guide*

OPM Logistics
- *Oracle Process Manufacturing Order Fulfillment User’s Guide*
- *Oracle Process Manufacturing Purchase Order Management User’s Guide*

OPM Process Planning
- *Oracle Process Manufacturing Forecasting User’s Guide*
- *Oracle Process Manufacturing MPS/MRP User’s Guide*

OPM Financials
- *Oracle Process Manufacturing Manufacturing Accounting Controller User’s Guide*
- *Oracle Process Manufacturing Accounting Setup User’s Guide*
- *Oracle Process Manufacturing and Oracle Financials Integration*
- *Oracle Process Manufacturing and Oracle Financials Implementation Guide*
Other Sources

Training

We offer a complete set of formal training courses to help you and your staff master Oracle® Process Manufacturing Process Operation Controls and reach full productivity quickly. We organize these courses into functional learning paths, so you take only those courses appropriate to your job’s area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle Education Services at any one of our many Education Centers, or you can arrange for our trainers to teach at your facility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources, sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.
Oracle is the world’s leading supplier of software for information management, and the world’s second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education and support services in over 140 countries around the world.

Thank You

Thank you for choosing Oracle® Process Manufacturing Process Operation Controls and this user’s guide.

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Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.
What is POC?

Process Operation Control (POC) is an extension to the OPM Production Management module that allows you to record more complete and detailed manufacturing data.

OPM Production Management users are able to record the actual material quantities consumed and yielded during manufacturing. POC provides the ability to record the actual consumption of non-material resources, such as labor, machine time and utilities, associated with a production batch. In addition, as the name implies, with POC, all manufacturing data can now be collected by operation (routing step).
POC and the Process ERP Model

An Enterprise Resource Planning (ERP) system, by definition, must be focused primarily on managing the resources of the enterprise. To serve this purpose, resources (both material and non-material) form the core of the ERP model.

The capabilities of an ERP system are limited only by the ERP model itself. A user must be able to accurately define each resource and its attributes.

Once the resources have been defined, the ERP system must allow the user to associate these resources in a way which closely resembles their manufacturing process. This step is called ‘process modeling’.

The process model then serves as the foundation for many other business functions including: cost modeling, planning (MRP & CRP), manufacturing, quality control, laboratory analysis and post-manufacturing resource utilization analysis.

Analysis by comparing the actual process results to the original process plan will permit the user to improve the process model and ultimately, to better manage the resources.
In OPM, the process model consists of 2 primary components:

- Formulas - where the relationship of material resources (products, ingredients, and byproducts) is maintained.
- Routings - where the process steps and activities of non-material resources are defined.

**Note:** For clarity, 'material resources' (raw materials, intermediates, finished goods) will hereafter be referred to as 'materials' and 'non-material resources' (labor, equipment, etc.) will be referred to as 'resources'.
To provide the greatest flexibility to process manufacturers, formulas and routings are built independently of each other, then linked through an effectivity. This way, several different formulas can use the same routing, or one formula can be associated with several different routings.

The effectivity links the formula to the routing for the purpose of defining the circumstances (date, quantity, plant, etc.) under which they are used for manufacturing. Both production batches and FPOs require effectivity links to formulas and routings. POC allows for a more detailed relationship between the formula and routing. This relationship associates the items in a formula to the related routing steps.
Planned and WIP Manufacturing Analysis

With POC, the production management orientation can be shifted from Batch/Materials to Operation/Resources. Also, the batch status of WIP can be broken down into significantly greater detail, to step percentage completion.

Operation/Resource Orientation

If you are a given resource, or are responsible for a given resource, you may need to answer the question: "What batches will require my attention today?" or "What ingredients go in at my step?"

If an operation represents your work center, you might ask: "Which batches will be routed through my work center today?"

WIP Status

Steps completed or percent completed can be critical information for downstream operations.

WIP status information can also be used to determine pending resource availability. POC provides inquiries and reports to acquire this information.
Post Manufacturing Analysis

The ultimate goal in collecting all of this data is to improve the manufacturing process and its efficiency. Depending on how standardized an environment is, there could be great value in comparing:

- Actual Data to Planned Data
- Actual Data to Standard Data
- Planned Data to Standard Data

Standard Data provides the standard basis for comparison and is represented by:

- Formula
- Operations
- Routing

Planned and Actual Data are maintained in the Production Batch. The batch planned data defaults from the Standard Data but like all plans, can be changed.

The following variances can be quite useful in analyzing the efficiency of a process.

*Bold Italic* = Associated with POC

<table>
<thead>
<tr>
<th>Planned Versus Actual:</th>
<th>Variance:</th>
<th>Compare:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ingredients used</td>
<td>Substitution</td>
<td>Batch to Formula</td>
</tr>
<tr>
<td>Products yielded</td>
<td>Process</td>
<td>Batch to Formula</td>
</tr>
<tr>
<td>Byproducts yielded</td>
<td>Process</td>
<td>Batch to Formula</td>
</tr>
<tr>
<td>Operations (Routing Steps)</td>
<td>Methods Change</td>
<td>Batch Steps to Routing Steps</td>
</tr>
<tr>
<td>Resources used</td>
<td>Substitution</td>
<td>Batch Step Detail to Operation</td>
</tr>
<tr>
<td>Ingredient Quantities</td>
<td>Planned Consumption</td>
<td>Batch Actual to Batch Planned</td>
</tr>
<tr>
<td></td>
<td>Standard Consumption</td>
<td>Planned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Batch Actual to Formula</td>
</tr>
<tr>
<td>Product Quantities</td>
<td>Planned Yield</td>
<td>Batch Actual to Batch Planned</td>
</tr>
<tr>
<td></td>
<td>Standard Yield</td>
<td>Planned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Batch Actual to Formula</td>
</tr>
<tr>
<td></td>
<td>Planned Yield</td>
<td>Batch Actual to Batch</td>
</tr>
<tr>
<td></td>
<td>Standard Yield</td>
<td>Planned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Batch Actual to Formula</td>
</tr>
</tbody>
</table>

**Process Quantity**

|                               | Planned Process Qty                                 | Batch Actual to Batch                   |
|                               | Standard Process Qty                                | Planned                                  |
|                               |                                                    | Batch Actual to Routing                  |

**Resource Usage**

|                               | Planned Usage                                      | Batch Actual to Batch                   |
|                               | Standard Usage                                     | Planned                                  |
|                               |                                                    | Batch Actual to Operation                |

**Resource Usage/Qty Processed**

|                               | Planned Rate                                       | Batch Actual to Batch                   |
|                               | Standard                                           | Planned                                  |
|                               |                                                    | Batch Actual to Operation                |

POC data provides the final elements of manufacturing information required for Actual Cost calculation. With the implementation of Actual Costing, the cost impact of these variances can also be determined.
Costing Measurements

At any point in time, the Resource Transaction Table (pc_tran_pnd) contains all completed resource transactions recorded to date for any given batch/step.

The rule for creating and editing 'completed' resource transactions will be the same as those for material transactions:

- No transactions may be completed until the batch has been released (batch status = WIP)
- Completed transactions may be recorded at any time while the batch status is WIP or Certified.
- If resource usage has not been posted while batch is WIP, then Certification will generate transactions to account for 'Standard' or planned resource usage.
- The resource transactions may be edited until the batch status is 'Closed'.
POC in Manufacturing

POC gives you operation-level status details over a work-in-process production batch. As the following diagram illustrates, POC uses the routing (which sequences operations into routing steps) to allow for the collection of more accurate and detailed manufacturing information.

With POC, the following information can be collected at each step:

- Material Consumed
- Non-material Resources Consumed including:
  - Number of Resources used
  - Duration of Resource usage
  - Quantity Processed by Resource/Activity
Overview of POC Related Forms

When a new Batch is created, the Standard Data (where applicable) is scaled to the batch quantity and becomes the Batch Planned Data. The batch plan can then be modified or executed, recording actuals and transactions.
POC Prerequisites

POC Prerequisite Overview

Certain data must be set up in other OPM modules before you can use the POC module. All of the required set ups for the PM module apply to POC. For example, units of measure must be set up in the OPM System module, items in the Inventory module, and formulas in the Formula Management module. All of the prerequisites for PM and POC are summarized in this chapter.
Setting Up OPM System Prerequisites

You must set up the following data in the OPM System module:

- System Profile Option SY$UOM_HOURS System Profile as HR.
  This profile specifies the default unit of measure that is expressed as gradation of time. Whenever time is allotted for resources, the unit of time must be converted to this unit of measure.

- Unit of Measure Types
  In addition to setting up units of measure types such as mass or volume, you must define a type for Time, if you have not already done so.

- Units of Measure
  In addition to the other UOMs you define, you must create a default UOM for the UOM type of Time (for example, HR)

- Organizations
  On the Organizations form, set the Plant indicator field to Manufacturing Plant and the Process Operator Control field to Collect POC Data.

- Document Ordering
  You must define document ordering for the following document types before they can be used in PM:
  - PROD - Production batches
  - FPO - Firm planned orders

**Note:** For more information on set ups in the OPM System Administration Module, refer to the *Oracle Process Manufacturing Implementation Guide*.
Formula Management Module Setup

The following data must be set up in the Formula Management module before you can use POC. For more information about the Formula Management module, see the Guide to OPM Formula Management and the on-line help for the appropriate forms.

- Activities
  Define activities on the Activities form. Activities are actions performed during production, for example, mixing or cooling. They should be divided by logical breakpoints in the manufacturing process.
  You assign cost analysis codes to activities. Cost analysis codes determine how the costs associated with an activity are calculated and processed by the Costing module. See the Oracle Process Manufacturing Costing Management User’s Guide for the Cost Analysis Codes form for more information about cost analysis codes.

- Operations
  Define operations on the Operations form. An operation is a combination of one or more activities performed in production batch and the resources used to perform those activities. A resource can be any noninventory item used in production, such as a blender or oven. For example, the operation of mixing is composed of the activity of mixing and the mixer (resource) used to perform the mixing.

- Routings
  A routing represents the sequence of operations or steps used during the manufacturing process. Define routings on the Routings form. On this form, you specify each operation in sequential order, the operation quantity, and the total routing quantity.
Capacity Planning Setup

The following data must be set up in the Capacity Planning module.

- Resources
  Set up resources on the resources form. Resources are the assets you use to produce batches, including production equipment and employee labor. You can define each resource very generally (for example, "OVENS") or specifically ("OVEN 1, OVEN 2," and so on). For each resource you must assign a classification code for costing purposes; see the Oracle Process Manufacturing Cost Management User’s Guide for details on the Cost Component Class form. You can (optionally) group resources into resource classifications (for example, "Ovens" and "Stoves" may be grouped into "Cooking Units").
POC Setup Screens

POC Setup Screens Overview

How you set up POC is dependent on the amount of detailed information you need for analysis. The more complex and detailed the informational needs, the more detailed and complex the setup requirements. After turning POC on for your plant (on the OPM System Administration’s Organization form), the minimum requirements for POC setup are:

- a formula
- a routing
- an effectivity

Each of these are set up in OPM Formula Management module. You will need to decide the level of information detail that is most appropriate for your production analysis. This could range from ignoring POC altogether to posting individual resource transactions.

The two POC screens described in this section are not required to run POC; however, if you want detailed data, you need to define routing step dependencies and establish a detailed relationship between formulas and routings.
Setting Up Routing Step Dependencies

This dialog box is used to modify routing step dependencies for new or substitute routing steps.

The Routing Step Dependencies form allows you to create and modify routing step dependencies. You may define new dependencies or delete dependencies. Step dependencies are relationships between routing steps such that a certain step can not start until another step is completed. For example, if step 10 is baking and step 20 is cooling, then step 10 must be completed before step 20 can begin, that is, step 20 is dependent on the completion of step 10.

The dependencies are used to calculate planned start times, but may be overwritten.

**Note:** The previous step must validate against the routing currently being edited, and must not be the same as the current step. However, be careful about defining circular references, for example 10<20<10.

**Setting Up Routing Step Dependencies - Procedure**

Proceed as follows:

1. Navigate to the Routing Step Dependencies form.
2. Complete the fields as described in the Routing Step Dependencies Form - Fields topic.
3. Save the form.

**Routing Step Dependencies Form - Fields**

The sections that follow describe the fields located on the Routing Step Dependencies form.

**Header Panel**

**Routing**

Enter the name of the routing for which you want to set up step dependencies. Required.

**Version**

Enter the version number of the routing for which you want to define step dependencies. Required.

**Routing Step**

Enter the name or number of the routing step for which you wish to set up a dependency relationship. Required.

**Operation**

This field displays the operation ID code associated with the routing step.
Dependencies Panel

**Previous Step**
Enter the routing step that the step you entered previously is dependent on. The dependent routing step must immediately succeed the routing step entered in this field.

**Type**
Select the type of dependency occurring.
- Normal
- Rework (rework is not supported at this time)

**Rework Reason**
This field is reserved for future use.

**Standard Delay**
Enter the standard number of hours from the end of the preceding routing step to the start of this routing step. This field is used to calculate POC operation start times. If you enter this time as zero (0), the next step starts immediately after the preceding step ends (back to back).

**Minimum Delay**
Enter the least/minimum number of hours from the end of the preceding routing step to the start of this routing step.

**Maximum Delay**
Enter the maximum number of hours from the end of the preceding routing step to the start of this routing step.

**Transfer Quantity**
This field is reserved for future use.

**UOM**
This field is reserved for future use.
Find Routing Step Dependencies

There are several options for locating a record and populating a form. The List of Values option displays a dialog box with the appropriate records. You can invoke Find All which populates the form with the first record from the header table. You can then scroll through the records. The Query Find option displays a separate block called the Find form, where you enter your search criteria.

Find Routing Step Dependencies - Procedure

To find batches, proceed as follows:

1. Choose Find from the Query menu.
2. Complete one or any combination of fields as described in the Find Routing Step Dependencies - Fields topic.
3. Click Find.

Find Routing Step Dependencies Form- Fields

Routing
Enter the id code of the routing.

Routing Version
Enter the routing version number.

Routing Step
Enter the routing step number.
Setting Up Routing Step/Formula Items Associations

This form is used to associate the routing steps with the lines (items) in a formula. The POC module allows for a more detailed relationship between formulas and routings than Production Management.

Upon entry of Routing and Formula, both arrays are displayed. You should scroll through the Routing Step array to move to the desired step. Click the current record indicator on the Routing Step line to select that step.

**Note:** If you need to use the same item in many different steps, it must be defined in separate lines in your formula.

Setting Up Routing Step/Formula Items Associations - Procedure

Proceed as follows:

1. Navigate to the **Routing Step/Formula Item Association** form.

2. Complete the fields as described in the **Routing Step/Formula Items Associations From - Fields** topic.

3. Save the form.

Routing Step/Formula Items Associations Form - Fields

The sections that follow describe the fields located on the Routing Step/Formula Item Associations form.

**Header Panel**

- **Routing**
  Enter the name of the routing that has steps you want to associate to a formula item.

- **Version**
  Enter the version number of the routing.

- **Formula**
  Enter the formula for which you want to associate items to routing steps.

- **Version**
  Enter the version number of the formula.

The fields below are populated with data when you complete the previous fields. The only field you can edit is the Formula Details Step field.
Routing Details Panel

**Step**
This field displays the step numbers of the routings.

**Operation**
This field displays the name of operation that the step performs.

**Description**
This field displays the description of the operation step.

**Step Qty**
This field displays the quantity processed by the step.

**UOM**
This field displays the unit of measure of the step quantity.

Formula Details Panel

**Step**
Enter the step number to which you want to associate this formula item.

**Type**
This field displays the item type (product, ingredient, byproduct)

**Line**
This field displays the formula line number for the formula item.

**Item**
This field displays the code or name of the formula item.

**Description**
This field displays the text of the description of the item.

**Quantity**
This field displays the quantity of the formula item.

**UOM**
This field displays the unit of measure of the formula item.
POC Processing Forms Overview

This section describes the POC processing forms. Each form requires increasing levels of detail about the batch steps that comprise the production run.

Viewing and Editing Batch Steps

Use this form to view and edit batch steps in a given production run. This form maintains both the planned and the actual batch step data for a POC controlled batch.

At this form, you may release, certify, close and cancel a batch step. In addition, you may view planned operations, planned start dates, planned completion dates and the status of each batch step.

The following forms can be accessed from the Batch Steps special menu:

- Batch Step Dependencies
- Batch Step/Batch Item Association
- Batch Step Details
- Resource Transactions
- Reschedule Step

Viewing and Editing Batch Steps - Procedure

To edit and view batch steps, proceed as follows:

1. Navigate to the Batch Steps form.
2. Using a Query option, enter the batch number.
3. You may do one of the following at this form:
   - Edit the date fields as described in the Batch Steps Form - Fields topic.
   - Select the Special menu options to display other forms, or to take an action on a step. (reschedule, release, certify, cancel or close).
4. Save the form.
**Batch Steps Form - Fields**

The sections that follow describe the fields located on the Batch Steps form.

**Header Panel**

**Batch**

Using Query Find or Query Find All, enter the number of the batch you wish to view or edit. POC must be on when the batch was made. The batch status displays in the unlabeled field. Batches may be pending, WIP, Certified or Canceled.

**Routing**

This field displays the routing that is used by this batch to produce the product.

**Routing Qty**

This field displays the quantity that is being produced by this batch routing.

**Batch Steps Panel**

**Drill Down Indicator (Unlabeled)**

Click this box to display the Batch Step Details form.

**Step**

This field displays number of the step.

**Operation**

This field displays the name of the operation to be performed at this routing step.

**Planned Dates Alternate Region**

**Start**

Edit/view the planned operation start date. This field can be edited while in pending status.

**Completion**

Edit/view the planned operation completion date. This field can be edited while in pending, or WIP status.

**Actual Dates Alternate Region**

**Start**

This field references the actual time and date the batch step started. It can be edited until the step is closed.

**Completion**

This field references the actual time and date the batch step was completed. It can be edited until the step is closed.
Step Quantities Alternate Region

**Planned**
Enter the planned quantity to be processed at this batch step. This field defaults to the scaled routing quantity.

**Actual**
Enter the actual quantity which was processed at this batch step. If no value is entered the system will default to the planned quantity.

Other Dates Alternate Region

**Due Date**
Displays the required completion date. This field is for information purposes only.

**Step Close**
This field records the actual date and time that the batch step was closed.
Find Batches

There are several options for locating a record and populating a form. The List of Values option displays a dialog box with the appropriate records. You can invoke Find All which populates the form with the first record from the header table. You can then scroll through the records. The Query Find option displays a separate block called the Find form, where you enter your search criteria.

Find Batches - Procedure

To find batches, proceed as follows:

1. Choose Find from the Query menu.
2. Complete one or any combination of fields as described in the Find Batches - Fields topic.
3. Click Find.

Find Batches Form - Fields

Status
Select a batch status from the list. Batch statuses you may select are:
- Canceled
- Pending
- WIP
- Certified
- Closed Batch.

Batch
Enter a batch number.

Routing
Enter a routing number.

Version
Enter the routing’s version number.

Batch Step Form - Buttons

Products
Displays the Batches form of the associated batch which includes the products manufactured by the batch. See the Oracle Process Manufacturing Production Management User's Guide for more information.
Output
Displays the Batch Output form of the associated batch. See the *Oracle Process Manufacturing Production Management User’s Guide* for more information.

Input
Displays the Batch Input form of the associated batch. See the *Oracle Process Manufacturing Production Management User’s Guide* for more information.

**Batch Steps Form - Special Menu**

**Byproducts**
Select this option to display the Productions Management By-products form. For more information, refer to the *Oracle Process Manufacturing Production Management User’s Guide*.

**Batch Step Details**
Select this option to display the Batch Step Details form. You must select the indicator of one of the batch steps to use this option.

**Item/Step Association**
Select this option to display the Item/Step Association form.

**Batch Step Dependencies**
Select this option to display the Batch Step Dependencies form.

**Release Step**
Select this option to release a step. The batch must be in WIP status.

**Certify Step**
Select this option to certify a step. The batch must be in WIP status.

**Close Step**
Select this option to close a step. The batch must be in WIP status.

**Reschedule Step**
Select this option to Reschedule a step. This displays the Reschedule Batch Step form. For more information refer to the *Rescheduling Batch Steps* section.

**Ingredients**
Select this option to display the Batch Ingredients form. This form is described in the *Oracle Process Manufacturing Production Management User’s Guide*.
Rescheduling Batch Steps

This dialog box is accessed from the Batch Steps form’s Special menu. Use the Reschedule Step dialog box to reschedule a pending batch step. You can change the planned start date and time and the planned complete date and time on a batch step that has a status of pending.

Changing the planned start date and time changes the date and time on the pending ingredient transactions. Changing the planned completion date and time changes the date and time on the pending product and byproduct transactions.

Rescheduling Batch Steps - Procedure

To reschedule batch steps, proceed as follows:

1. Navigate to the Batch Steps form and populate the fields as described in Viewing and Editing Batch Steps - Procedure topic.

2. From the Special menu, select Reschedule Step. This displays the Reschedule Step dialog box.

3. Complete the fields as described in the Reschedule Step Dialog Box - Fields topic.

4. Click OK. The dates you changed will be reflected in the appropriate fields on the Batch Steps form.

5. Save the form.

Reschedule Step Dialog Box - Fields

**Planned Start Date**

Enter the new planned start date for the batch step. You can only edit this field if the batch has a status of Pending.

**Planned Completion Date**

Enter the new planned completion date for the batch step. You can only edit this field if the batch has a status of Pending.

Reschedule Batch Steps - Special Menu

**Byproducts**

Select this option to display the Productions Management By-products form. For more information, refer to the Oracle Process Manufacturing Production Management User’s Guide.

**Batch Step Details**

Select this option to display the Batch Step Details form which is described in the Viewing Batch Step Details topic. You must select one of the batch steps to use this option.
Item/Step Association
Select this option to display the Item/Step Association form.

Batch Step Dependencies
Select this option to display the Batch Step Dependencies form. You must select one of the batch steps to use this option.

Release Step
Select this option to release a step. The batch must be in WIP status. You must select one of the batch steps to use this option.

Certify Step
Select this option to certify a step. The batch must be in WIP status. You must select one of the batch steps to use this option.

Close Step
Select this option to close a step. The batch must be in WIP status. You must select one of the batch steps to use this option.

Reschedule Step
Select this option to Reschedule a step. This displays the Reschedule Batch Step form. You must select one of the pending batch steps to use this option. For more information refer to the Rescheduling Batch Steps section.

Ingredients
Select this option to display the Batch Ingredients form. This form is described in the Oracle Process Manufacturing Production Management User’s Guide.
Defining Batch Step Details

The Batch Step Detail form enables you to define in detail the resources and activities associated with each routing step. This form displays the same operation/step dates as the Batch step form. You may also edit the planned values, delete resource rows and insert new rows for additional details.

Similar to the Operations form when defining resource usage, this form adds the notion of dates and times and planned and actual quantities to permit recording of step detail data in production.

Defining Batch Step Details - Procedure

1. At the Batch Steps form, click the drill down indicator box next the batch step whose details you want to see. This displays the Batch Step Details form.
2. Complete the fields as described in the Batch Step Details Form.
3. Fields topic.
4. Save the form.

Batch Step Details Form - Fields

The sections that follow describe the fields located on the Batch Step Details form.

Header Panel

Batch
This field displays the batch ID number and its associated organization code.

Batch Step
This field displays the batch step number. To select a new step to modify you must return to the Batch Step form.

Operation
This field displays the operation number associated with this batch step and its corresponding description.

Planned Start
This field displays the planned start date associated with this batch step. This field can be edited on the batch steps form.

Planned Completion
This field displays the planned completion date associated with this batch step. You can edit this information on the Batch Steps form.
Operation Details Panel

Resource
Enter the name or number of the resource used in this manufacturing operation. Resources can be such things as blenders, ovens, or any other non-inventory item used in production. You set up resources on the Resources form in the Capacity Requirement Planning module.

Activity
Enter the code reflecting the activity for which this resource is involved. Activities are set up on the Activities form.

Planned Throughput Alternate Region

Count
Enter the planned number of resources needed for this activity (01-99). For example, if two identical blenders are needed, enter 2.

Process Qty
Enter the planned process quantity for the resource. This quantity, combined with the Usage, define the usage rate. For example, if the resource can mix 200 gallons per hour, enter 200 in this field and 1 in the Usage field.

UOM
Enter the unit of measure in which the planned process quantity is expressed. UOMs are defined on the Unit of Measure form.

Usage
Enter the planned resource usage required for the process quantity. This is normally measured in time, but may be measured in other units for resources such as electricity.

For example, if the resource can mix 200 gallons per hour, enter 200 in the Process Qty field and 1 in this field.

UOM
Enter the unit of measure in which the planned usage is expressed (usually HR). UOMs are defined on the Unit of Measure form.
Actual Throughput Alternate Region

Count
Enter the actual number of resources needed for this activity (01-99). For example, if two identical blenders are needed, enter 2.

Process Qty
Enter the actual process quantity for the resource. This quantity, combined with the Usage, defines the usage rate. For example, if the resource can mix 200 gallons per hour, enter 200 in this field and 1 in the Usage field.

UOM
Enter the actual process quantity unit of measure.

Usage
Enter the actual resource usage required for the process quantity. This is normally measured in time, but may be measured in other units for resources such as electricity.

For example, if the resource can mix 200 gallons per hour, enter 200 in the Process Qty field and 1 in this field.

UOM
Enter the unit of measure in which the actual usage is expressed (usually HR). UOM are defined on the Unit of Measure form on the System Administration menu.

Planned Dates Alternate Region

Start
Enter/view planned resource start date. This field can be edited while in pending status.

Completion
Enter the planned resource completion date. This field can be edited while in pending or WIP status.

Actual Dates Alternate Region

Start
Enter the actual time and date that this activity began.

Completion
Enter the actual time and date that this activity was completed.
Scheduling Information Alternate Region

**Resource Type**
Designate this resource as either primary or secondary.

A primary resource limits or determines cost or time at a specific routing step.

For example, when producing white paint, the paint is mixed in 1,000 gallon tanks. There are two resources, the labor needed to operate the mixing equipment and the tank to hold the paint.

The tank is the primary resource because even if there is an increase in labor, the time required to mix the paint will not change because the tank capacity is constant.

**Offset**
Enter the number of hours from the batch step start to the start time of this activity.

**Scale Type**
Select to designate the scale type as fixed or linear.

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The fields described below display at the bottom of the form.

**Resource Desc**
This field displays the description associated to the Resource code. Resources are set up on the Resources form.

**Activity Desc**
This field displays the description associated to the Resource Activity code. Activities are set up. Activities are set up on the Activity form.

**Component Class Desc**
This field displays the description associated with the Component Class code. Component Class codes are set up on the Component Class form.

**Analysis Desc**
This field displays the description associated with the Analysis code. Analysis codes are set up on the Cost Analysis Codes form.
**Associating Batch Steps with Items**

This form is used to modify the batch steps at which given items are introduced into or yielded from the production process. It is currently an optional form used to record information for user defined reports.

The POC module sets up a more detailed relationship between batches and batch steps. POC provides a record of ingredients or items that go into a given batch step.

If the production planner needs to alter the steps at which given items are introduced into or yielded from the process, use this form.

The only editable fields on this form are the batch item Step fields.

**Note:** If you do not assign a routing step to all Batch Items the following error message will appear: All items do not have a Routing step associated, continue(y or n)?

**Associating Batch Steps with Formula Items - Procedure**

To associate routing steps with formula items, proceed as follows:

1. Navigate to the **Batch Step/Formula Item Association** form.
2. Enter the routing number and version whose steps you want to associate to formula items.
3. Enter the formula number and version whose items you want to associate with the routing information entered in step 2.
4. In the **Formula Details** panel click the **Step** field of the item you want to associate. Enter the routing step you want to associate to the formula item.
5. Continue until you have associated all the steps.
6. Save the form.

**Batch Step/Batch Item Association Form - Fields**

The sections that follow describe the fields located on the Batch Step/Batch Item Association Form.

**Header Panel**

**Routing**

Enter the ID number of the routing you want to associate to the steps.

**Version**

Enter the routing version number.
Formula
Enter the name of the formula whose items you want to associate to the routing.

Version
Enter the formula version number.

Step Details Panel

Step
This field displays the routing step number.

Operation
This field displays the operation name or ID code.

Description
This field displays the description associated to the operation name.

Step Qty
This field displays the quantity processed by the step.

UOM
This field displays the unit of measure in which the step quantity is expressed.

Item Details Panel

Step
Enter the number of the batch step you wish to associate with a given item.

Type
This field displays the item’s formula type. Items can be products, byproducts or ingredients.

Line
This formula displays item’s line in the formula.

Item
This field displays the item’s ID code.

Description
This field displays the description associated with the item ID code.

Quantity
This field displays the quantity of the item that is produced by the batch.

UOM
This field displays the unit of measure in which the formula quantity is expressed.
Defining Batch Step Dependencies

The Batch Step Dependencies form allows you to modify batch steps and their dependencies. You may define new batch step dependencies or delete old batch step dependencies. If you insert a new step, you must establish its immediate dependencies here. If you delete a routing step the associated dependencies will automatically be deleted.

The previous step number column has a lookup restricted to those steps in the routing being edited excluding the current step. When a ‘previous step’ is entered, the following field displays the operation (which can not be edited). The only dependency type supported initially is Normal. When Normal is selected, the cursor skips the Rework Reason Code field.

**Note:** Previous step must validate against the batch steps currently being edited, and must not be the same as the current step.

Defining Batch Step Dependencies - Procedure

1. At the **Batch Steps** form, select **Batch Step Dependencies** from the **Special** menu. This displays the **Batch Step Dependencies** form.

2. Complete the fields as described in the **Batch Step Dependencies Form - Fields** form.

3. Save the form.

Batch Step Dependencies Form - Fields

The sections that follow describe the fields located in the header and Batch Step Dependencies panels.

Header Panel

**Batch**
Displays the batch ID code for which you want to create step dependencies.

**Batch Step**
Enter the name or number of the batch step you wish to view or modify.
Batch Step Dependencies Panel

Previous Step
Enter the name or number of the previous batch step associated with this dependency.

Type
Enter the type of dependency: Normal or Rework. Currently only Normal is functional in OPM.

Std Delay
Enter the standard time elapsed between the end of the preceding batch step and the start current batch step.

Min Delay
Enter the minimum time elapsed between the end of the preceding batch step and the start current batch step.

Max Delay
Enter the maximum time elapsed between the end of the preceding batch step and the start current batch step.

Transfer Qty
Enter the quantity of material being transfer from the previous batch step.

UOM
Enter the unit of measure in which the quantity is expressed.
Editing Batch Resource Transactions

This form is used to edit transactions to post incremental resource usage. The transaction usage is a required field. When entering a quantity, the actual usage field is automatically updated by the system. The resource start and stop dates are for posting ‘clock on’ and ‘clock off’ data for the resources, and are not required.

This form is accessed from the Batch Step Detail form. The step has to be WIP or certified. With the cursor positioned on a given step detail indicator, you can then select Special > Transactions to post incremental resource usage.

**Batch Resource Transactions - Procedure**

1. At the **Batch Steps Details** form, place the cursor on the line.
2. Select **Transactions** from the **Special** menu. This displays the **Batch Resource Transactions** form.
3. Complete the fields as described in the **Batch Resource Transactions form - Fields** topic.
4. Save the form.

**Batch Resource Transactions Form - Fields**

The sections that follow describe the fields located in the header and Transaction Details panels.

**Header Panel**

**Batch**
This field displays the number of the batch you wish to edit.

**Batch Step**
This field displays the number of the batch step you wish to edit.

**Resource**
This displays the resource used on this operation line.

**Activity**
This field displays the activity to be performed on this operation line.

**Actual Resource Usage**
This field displays the actual amount of this resource used to perform the activity on this operation line. If no value is entered the system defaults to the planned data.
Transaction Details Panel

**Date**
Enter the date of the resource transaction. This defaults to the current date. This date is used by the costing.

**Usage**
Enter the incremental usage in this field. This is how much time the resource has used for the transaction.

**Start**
Enter the start date and time of the resource transactions. The data entered here is used for user defined reporting.

**Stop**
Enter the end date and time of the resource transaction. The data entered here is used for user defined reporting.

**Reason**
Enter the reason code associated with this resource transaction. Reason codes are entered in the OPM System Administration module.
Reporting Batch Operation WIP

This form is used for reporting inter-operation WIP transactions. It is for information purposes only.

**Note:** Step description may not be edited on this form.

Reporting Batch Operation WIP - Procedure

Proceed as follows:

1. Navigate to the **Batch Operation WIP** form.
2. Complete the fields as described in the **Batch Operation WIP Form - Fields** topic.
3. Save the form.

Batch Operation WIP Form - Fields

**Batch**

Using a Query option, enter the number of the batch for which you would like to edit WIP transfers.

**Batch Step**

Enter the batch step number for which you would like to edit WIP transfers.

WIP Received Panel

**Quantity**

Enter the material quantity that was transferred from the previous batch step.

**UOM**

Enter the unit of measure for the material quantity transferred from the previous batch step.

**Step**

Enter the step number of the previous batch step from which you transferred material.

**Transaction Date**

Enter the date and time when the material transfer took place.
WIP Sent Panel

**Quantity**
Enter the quantity of the material that was transferred from this batch step.

**UOM**
Enter the unit of measure for the material that was transferred from this batch step.

**Step**
Enter the number of the batch step where material should be transferred.

**Transaction Date**
Enter the date and time when the material transfer took place.

Find WIP Batches

There are several options for locating a record and populating a form. The List of Values option displays a dialog box with the appropriate records. You can invoke Find All which populates the form with the first record from the header table. You can then scroll through the records. The Query Find option displays a separate block called the Find form, where you enter your search criteria.

Find WIP Batches - Procedure

To find batches, proceed as follows:

1. Choose **Find** from the **Query** menu.
2. Complete one or any combination of fields as described in the **Find Batches - Fields** topic.
3. Click **Find**.

Find WIP Batches Form- Fields

**Status**
Select WIP status from the list.

**Batch**
Enter a WIP batch number.

**Batch Step**
Enter a Operation Step number associated with a WIP batch.
POC Inquiries

Viewing WIP Batch Information Overview

Use the POC WIP (work in process) Inquiry to view detailed information about batches that are in process. When you first select WIP Inquiry from the POC menu, the POC WIP Inquiry Selection Box appears. The entries you make in this box determine the batch data shown. At the second screen displayed, you select a batch on which you want to view more detailed information.

Viewing WIP Batch Information - Procedure

To view WIP batch status information, proceed as follows:

1. Navigate to the POC Wip Inquiry - Selection Box.
2. Complete the fields as described in the POC WIP Inquiry Selection Box - Fields topic.
3. Click OK. This displays the first POC WIP Inquiry. This inquiry lists batches that meet the criteria you entered along with general information. For a description of the fields in the POC WIP Inquiry, see the WIP Inquiry (first) - Fields topic.
4. At the first POC WIP Inquiry form, click the drill down indicator next to the batch on which you want to see more details. This displays the second POC WIP Inquiry form. This inquiry displays detailed information on the batch you selected. For a description of the fields in the second POC WIP Inquiry, see WIP Status Inquiry (second) - Fields topic.
5. When you are done viewing the data, click Close.
POC WIP Inquiry Selection Box

At this box you enter criteria to select WIP batches that you want to view more information on.

**POC WIP Inquiry Selection Box - Fields**

**Organization**
Enter one or a range of organizations. Leaving the From and To fields blank indicates you want to do an inquiry on All organizations.

**Batch**
Enter one batch number or a range of batch numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All batches.

**Start Date**
Enter a single start date or a range of start dates.

**Formula**
Enter one formula or a range of formulas. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.

**Version**
Enter a single version number or a range of version numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.

**Routing**
Enter one routing or a range of routings. Leaving the Form and To fields blank indicates you want to do an inquiry on All formulas.

**Version**
Enter a single version number or a range of version numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.
POC WIP Inquiry (first)

After you enter the selection criteria, the first POC WIP Inquiry appears. This inquiry displays batches that meet the criteria you entered on the POC WIP Inquiry Selection Criteria dialog box. At this dialog box, you select the batch for which you want to see details.

The purpose of the inquiry is to provide you with more information about batches in-process. For example, you can view the number of steps in a batch, the number of steps completed in a batch and the number of steps still in process. This entire form is display only.

POC WIP Inquiry Form - Procedure

Click the box next to the batch on which you want to view detailed information.

POC WIP Inquiry (first) - Fields

Drill Down Indicator (Unlabeled)

Click this drill down indicator to view the more detailed information on the second POC WIP Inquiry form.

Plant

This field displays the plant organization code.

Batch

This field displays the batch ID number.

Planned Completion Date

This field displays the batch steps planned start date and time.

Routing

This field displays the routing ID number.

Version

This field displays the routing version ID number.

Total Steps

This field displays the total number of steps in the routing.

Certified Steps

This field displays the number of steps that have been certified.

Active Steps

This field displays the number of steps that are still active.
POC WIP Inquiry (first) - Special Menu Options

Work in Progress Details
This displays the second POC WIP Inquiry which lists more detailed WIP batch information.

POC WIP Inquiry (second)

After you click the drill down indicator or select Work In Progress from the Special menu, the second POC WIP Inquiry displays. At this form, you view line details of a WIP batch.

POC WIP Inquiry (second) - Fields
The sections below describe the fields in the various panels of the second POC WIP Inquiry.

Header Panel

Batch
This field displays the batch ID number.

Product
This field displays the code of the primary product that is produced by the batch.

Routing
This field displays the routing ID number.

Version
This field displays the routing version number.

Qty
This field displays the quantity of the product that is produced by this batch/routing/version combination.

Description
This field displays a description of the routing.

Step
This field displays the operation step number.

Planned Dates Panel

Operation
This field displays the name of the operation performed by the step.

Start
This field displays the planned start date and time for the batch step.

Completion
This field displays the planned completion date and time for the batch step.

**Status**
This field displays the status of the step. Steps may be pending, WIP, canceled, certified, or closed.

**Description**
This field displays a description of the operation step which has its box highlighted.

**Actual Dates Panel**

**Start**
This field displays the operation’s actual start date time.

**Completion**
This field displays the operation’s actual completion date and time.

**Dates Panel**

**Step Closed**
This field displays the date and time the batch step was closed.

**Required Completion**
This field displays the required completion date and time.

**Planned**
This field displays the planned step quantity

**Step Quantities Panel**

**Actual**
This field displays the actual step quantity.

**Priority Panel**

**Code**
This field is reserved for future use.

**Value**
This field is reserved for future use.

**POC WIP Inquiry (second) - Special Menu**

**Work In Progress**
Select this option to return to the first POC WIP Inquiry form.
Viewing Material Variance Information

Use the Material Variance Inquiry to view detailed information about batch material production and consumption. When you first select the Material Variance option from the POC menu, the Material Variance Selection Box appears. The entries made in the Selection Box determines the batch data shown.

Viewing Material Variance Information - Procedure

To view material variance information, proceed as follows:

1. Navigate to the Material Variance Selection Box.
2. Complete the fields as described in the POC WIP Inquiry Selection Criteria Box - Fields topic.
3. Click OK. This displays the first Material Variance Inquiry. This box lists batches that meet the criteria you entered along with general information. For a description of the fields in the Material Variance Inquiry, see the Material Variance Inquiry - Fields topic.
4. At the Material Variance Inquiry, click the drill down indicator next to the batch on which you want to see ingredient details. This displays the second Material Variance - Ingredients Inquiry. This dialog box displays detailed ingredient information on the batch you selected. For a description of the fields in this inquiry, see the Material Variance Ingredients Inquiry - Fields topic.
5. To view step details, click the indicator box next to the line item. This displays the Material Variance - Step Details box.
Material Variance Selection Box

This dialog box appears when you select Material Variance from the POC menu. The data entered here determines the batches selected for viewing in the inquiry form. After OK is selected, the Material Variance Inquiry form appears.

Material Variance Selection Box - Fields

**Organization**
Enter one or a range of organizations. Leaving the From and To fields blank indicates you want to do an inquiry on All organizations.

**Batch**
Enter one batch number or a range of batch numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All batches.

**Start Date**
Enter a single start date or a range of start dates.

**Formula**
Enter one formula or a range of formulas. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.

**Version**
Enter a single version number or a range of version numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.

**Routing**
Enter one routing or a range of routings. Leaving the Form and To fields blank indicates you want to do an inquiry on All formulas.

**Item**
Enter a single item number or a range of item numbers. Leaving the Form and to fields blank indicates you want to do on inquiry on All items. This is the item (product) on which you want to see material variances.
Material Variance Inquiry

The purpose of the Material Variance Inquiry is to provide information about where and when materials are produced and consumed within a production run. This entire form is display only. From this inquiry you can proceed to the Material Variance - Ingredient Inquiry. To do this, click the drill down indicator on the same line as the batch on which you want to view ingredient information.

Material Variance Inquiry - Fields

Indicator (Unlabeled)
Click this field to display the Material Variance - Ingredient Inquiry.

Organization
This field displays the organization code.

Batch
This field displays the Batch ID code.

Actual Start Date
This field displays the actual start date of the batch.

Item
This field displays the item code.

Planned Qty
This field displays the planned quantity to be produced by the batch.

Actual Qty
This field displays the actual quantity produced by the batch.

Variance
In percentages, this field displays the variance between the planned quantity and the actual quantity produced by the batch.

Material Variance Inquiry - Special menu

Ingredients
Select this option to display the Material Variance - Ingredient Inquiry.
Material Variance - Ingredient Inquiry

The Material Variance - Ingredient Inquiry displays when you click the box next to the line item on the Material Variance Inquiry or when you select Ingredients from the Material Variance Inquiry Special menu. This inquiry lists ingredient consumption detail information.

Material Variance - Ingredient Inquiry - Fields

The sections below describe the fields in the various panels of the Material Variance -Ingredient Inquiry.

Header Panel

Batch
This field displays the plant code and the batch ID number.

Product

Routing
This field displays the routing ID number.

Version
This field displays the routing version number.

Formula
This field displays the formula ID.

Version
This field displays the formula version number.

Planned Panel

Quantity
This field displays the routing planned quantity of the product produced by the batch.

Start Date
This field displays the planned start date and time.

Completion Date
This field displays the planned completion date and time.

Actual Panel

Quantity
This field displays the actual quantity of the product produced by the batch.

Start Date
This field displays the actual start date and time.
Completion
This field displays the actual completion date and time.

Ingredient Details Panel

Item
This field displays the item ID number for the ingredient used.

Planned Qty
This field displays the planned ingredient consumption quantity.

Actual Qty
This field displays the actual ingredient consumption quantity.

UOM
This field displays the unit of measure in which the ingredient quantities are expressed.

Variance
Displays the variance (in percent) between the planned and actual quantities of the ingredient consumption.

Planned Qty2
This field displays the planned quantity if the ingredient is dual unit of measure enabled.

Actual Qty2
This field displays the actual quantity used for the second UOM if the ingredient has dual unit of measure enabled.

Material Variance Ingredient Inquiry - Special menu

Material Variance
Select this option to return to the Material Variance Inquiry form.

Step Details
Select this option to display the Material Variance - Step Details Inquiry.
Material Variance - Step Details Inquiry

This inquiry lists POC step information for an ingredient in a production batch. You access this form from the Material Variance - Ingredient Inquiry.

Material Variance - Step Details Fields

The sections below describe the fields in the various panels of the Material Variance - Step Details Inquiry.

Header Panel

Batch
This field displays the plant code and batch ID code to which the step is associated.

Ingredient
This field displays the ingredient in the formula which is associated to the step.

Routing
This field displays the routing used to produce the batch.

Version
This field displays the routing version number.

Product
This field displays the ID code of the product produced by the batch which consumes the ingredient.

Planned Quantity
This field displays the planned quantity of the ingredient.

Actual Quantity
This field displays the actual quantity of the ingredient that was used by the batch.

UOM
This field displays the unit of measure in which the ingredient quantity is expressed.

Step Details Panel

Step
This field displays the number of the batch step.

Operation
This field displays the ID code of the operation that the step is performing on the ingredient.
**Status**
This field displays the status of the step (WIP, Certified, etc.)

**Standard Quantity**
This field displays the formula quantity of the ingredient associated with the step.

**Planned Quantity**
This field displays the planned quantity of the ingredient associated with the step.

**Actual Quantity**
This field displays the actual quantity of the ingredient associated with the step.

**UOM**
This field displays the unit of measure in which the quantities are expressed.

**Variance**
This field displays the difference between the planned quantity and actual quantity consumed. Variance = actual/planned.

---

**Material Variance Step Details - Special Menu**

**Ingredients**
Select this option to return to the Material Variance - Ingredient Inquiry
Viewing Batch Step Variances

Use the Batch Step Variance Inquiry form to view detailed information about batch steps in a production run. The entries made in the Batch Step Variance Dialog Box determines the data shown.

Viewing Batch Step Variances - Procedure

To view material variance information, proceed as follows:

1. Navigate to the Batch Step Variance - Dialog Box.
2. Complete the fields as described in the Batch Step Variance Dialog Box - Fields topic.
3. Click OK. This displays the Batch Variance Inquiry. This box lists batches that meet the criteria you entered along with general information. For a description of the fields in the Batch Variance Inquiry, see the Batch Step Variance Variance Inquiry - Fields topic.
4. At the Batch Variance Inquiry, click the drill down indicator next to the batch on which you want to see ingredient details. This displays the Batch Step Variance Inquiry. This inquiry displays detailed ingredient information on the batch you selected. For a description of the fields in this inquiry, see Batch Step Variance Inquiry - Fields.
5. To view operation step details, click the drill down next to the line item. This displays the Batch Variance Inquiry - Operation Details form. For a description of the fields on this inquiry, see the Batch Variance Inquiry - Operation Details - Fields topic.
Batch Step Variance - Dialog Box

This dialog box appears when you select the Batch Step Variance Inquiry. The data entered here determines the batches selected for viewing in the inquiry form.

Batch Step Variance Dialog Box - Fields

**Organization**
Enter one or a range of organizations. Leaving the From and To fields blank indicates you want to do an inquiry on All organizations.

**Batch**
Enter one batch number or a range of batch numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All batches.

**Start Date**
Enter a single start date or a range of start dates.

**Formula**
Enter one formula or a range of formulas. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.

**Version**
Enter a single version number or a range of version numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.

**Routing**
Enter one routing or a range of routings. Leaving the Form and To fields blank indicates you want to do an inquiry on All formulas.

**Version**
Enter a single version number or a range of version numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.
**Item**

Enter a single item number or a range of item numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All items. This is the item (product) on which you want to see material variances.

**Operation**

Enter a single operation code or a range of operation codes. Leaving the From and To fields blank indicates you want to do an inquiry on All operations.
Batch Variance Inquiry Form

Use this inquiry to view batch level information about batch steps in a production run at the batch level. The entries made in the Batch Step Variance Dialog Box determines the data shown.

To get more detailed information about any specific batch, you must select it on this form by clicking the indicator box on the same line as the batch on which you want to view variance information. This displays the Batch Step Variance Inquiry form which provides a more detailed view of a specific batch’s steps.

Indicator (Unlabeled)
Click this box to proceed to the Batch Step Variance Inquiry.

Org
This field displays the organization code for the plant.

Batch
This field displays the plant code and batch ID number.

Actual Completion Date
This field displays the actual Compton date for the batch.

Routing
This field displays the routing ID number.

Version
This field displays the routing’s version number.

Num of Routing Steps
This field displays the number of routing steps.

Num of Batch Steps
This field displays the number of batch steps.

Planned Hours
This field displays the planned number of hours to complete the batch step.

Actual Hours
This field displays the actual number of hour used to complete the batch step.

Variance
This field displays the variance between the planned and actual time to complete the batch step.
Batch Variance Inquiry - Special Menu

Batch Step Variance

This option displays the Batch Step Variance Inquiry which is discussed in the next section.
Batch Step Variance Inquiry

Use this inquiry to view detailed information about batch steps in a production run. This form displays the data related to the batch you selected on the previous form. From this screen you can navigate to the Batch Step Inquiry - Operation Details form.

Batch Step Variance Inquiry - Fields

The sections below describe the fields in the various panels of the Batch Variance Inquiry.

Header Panel

**Indicator (Unlabeled)**
Click this indicator box to proceed to the Batch Variance Inquiry - Operation Details form.

**Batch**
This field displays the batch ID number.

**Product**
This field displays the product’s item ID number.

**Routing**
This field displays the routing ID number.

**Version**
This field displays the routing’s version number.

Planned Dates Panel

**Start**
This field displays the planned start date and time for the batch.

**Completion**
This field displays the planned completion date and time for the batch.

Actual Dates Panel

**Start**
This field displays the actual start date and time for the batch.

**Completion**
This field displays the actual completion date and time for the batch.

The fields described below provide batch step information. The date and time information are located in alternate regions which are selected from the drop down list.
Step Details Panel

**Step**
This field displays the step number.

**Operation**
This field displays the name of the operation performed by the step.

**Start Date**
(Planned Dates alternate region)
This field displays the planned start date and time of the operation performed by the batch step.

**Completion**
(Planned Dates alternate region)
This field displays planned completion and time date of the operation performed by the batch step.

**Start**
(Actual Dates alternate region)
This field displays the actual date and time the operation performed by the batch step was started.

**Completion**
(Actual Dates alternate region)
This field displays the actual date and time the operation performed by the batch step was completed.

**Planned Hours**
This field displays the planned time in hours it took to complete the operation step.

**Actual Hours**
This field displays the actual time in hours it took to perform the operation step.

**Variance**
This field displays the difference (in percentage) between the planned and the actual time it took to complete to operation step.
**Batch Step Variance Inquiry - Special Menu**

**Batch Variance**
Select this option to return to the previous form, the Batch Variance Inquiry.

**Operation Details**
Select this option to display the Operation Details form.
Batch Variance Inquiry - Operation Step Details

The Operation Details form displays detail information on an operation step. You navigate to this form by clicking the drill down indicator next to the operation step you want to view more details on or by selecting Operation Details from the Batch Step Variance Inquiry’s Special menu.

Batch Variance Inquiry Operation Details Form - Fields

The sections below describe the fields in the various panels of the Batch Variance Inquiry - Operation Details form.

Header Panel

Batch
This field displays the batch ID code.

Product
This field displays the product’s item ID code.

Qty Per Batch
This field displays the quantity of the product manufactured by the batch.

Batch Step
This field displays the number of the step you selected.

Operation
This field displays the name of the operation performed by the step.

Process Qty UOM
The unit of measure in which the process quantity is expressed.

Planned Dates Panel

Start
This field displays the planned start date and time for the batch.

Completion
This field displays the planned completion date and time for the batch.

Actual Dates Panel

Start
This field displays the actual start date and time for the batch.

Completion
This field displays the actual completion date and time for the batch.
**Usages Panel**

**Resource**
This field displays the name or ID code of the resource used to perform the operation step. Resources are the assets you use to produce batches, including production equipment and employee labor. Resources are set up in the OPM Capacity Requirement Planning module.

**Count**
This field displays the number of resources normally used to complete the operation step. This information is set up on the Routings form. This is for informational purposes only.

**Activity Code**
This field displays the code for the activity performed by the resource. For example, BLEND for blending. Activities are set up in the Formula Management module.

**Planned**
This field displays the planned usage of the resource (time).

**Actual**
This field displays the actual usage of the resource (time).

**UOM**
This field displays the usage unit of measure (time UOM). For example HR, for hour.

**Variance**
This field displays (in percentage) the difference between the planned and actual usage of the resource.

**Planned Dates Panel**

**Start**
This field displays the planned start date and time for the resource/step combination.

**Completion**
This field displays the planned completion date and time for the resource/step combination.

**Actual Dates Panel**

**Start**
This field displays the actual start date and time for the resource/step combination.

**Completion**
This field displays the actual completion date and time for the resource/step combination.
The field described below is located at the bottom of the form.

**Actual Count**
This is the actual number of resources used. This is for informational purposes only.

**Batch Step Variance Operation Details Form - Special menu**

**Batch Step Variance**
Select this option to display the Batch Step Variance Inquiry form.
Viewing Resource Variances

Use the Resource Variance Details form to view information about resource consumption during production. Resources are the assets you use to produce your products such as machinery and labor. Resources are set up on the Resources form in the OPM Capacity Planning module.

Resource Variance Selection Box

This dialog box appears when you select the Resource Variance Inquiry. The data entered here determines the batches selected for viewing in the inquiry form.

Resource Variance Selection Box - Procedure

1. Navigate to the Resource Variance Selection Box.
2. Complete the fields as described in the Resource Variance Selection Box - Fields topic.
3. Click OK. This displays the Resource Variance Details form. For information on this form, see the section Viewing Resource Variance Details.

Resource Variance Selection Box - Fields

Resource
Enter one or a range of resource codes. Leaving the From and To fields blanks indicates you want to do an inquiry on All resources.

Organization
Enter one or a range of organizations. Leaving the From and To fields blank indicates you want to do an inquiry on All organizations.

Batch
Enter one batch number or a range of batch numbers. Leaving the From and To fields blank indicates you want to do an inquiry on All batches.

Start Date
Enter a single start date or a range of start dates.

Formula
Enter one formula or a range of formulas. Leaving the From and To fields blank indicates you want to do an inquiry on All formulas.
**Version**
Enter a single version number or a range of version numbers. Leaving the From and To fields blank indicates you want to do an inquiry on all formulas.

**Routing**
Enter one routing or a range of routings. Leaving the Form and To fields blank indicates you want to do an inquiry on all formulas.

**Version**
Enter a single version number or a range of version numbers. Leaving the From and To fields blank indicates you want to do an inquiry on all formulas.

**Operation**
Enter a single operation code or a range of operation codes. Leaving the From and To fields blank indicates you want to do an inquiry on all operations.
Resource Variance Details Form

Use the Resource Variance Details form to view information about variances in resource consumption. The entries made in the Resource Variance Selection Box determines the batch data shown.

The purpose of this inquiry is to provide information about resource usage. For example, you can view details about the non-material resources used, the date and time specific resources are used, the planned and actual time they are used and the variance between the planned and actual use.

Resource Variance Details Form - Procedure

1. Navigate to the Resource Variance Selection dialog box.
2. Complete the fields as described in the Resource Variance Selection Box - Fields section and click OK. This displays the Resource Variance Details form.
3. To see more detailed Resource Usage information, click the drill down indicator next to the resource on which you want to view more detailed information. This displays the Resource Usage form.

Drill Down Indicator (Unlabeled)
Click this box to see Resource Usage details.

Resource
This field displays the code or name of the resource that meets the criteria you entered on the Resource Variance Selection Criteria Box.

Usage Date
This field displays the date on which the resource was used.

Total Batches
This field displays the number of batches on which the resource was used.

Planned Hours
This field displays the planned number of usage hours for the resource.

Actual Hours
This field displays the actual number of usage hours for the resource.

Variance
This field displays the variance (percentage) between the planned hours and the actual hours.
Resource Variance Details Form - Special Menu

Resource Usage
Select this option to view the Resource Usage form.

Resource Usage Form
Use this form to view information on resource usage.

Resource Usage Form - Fields

Resource
This field displays the name of the non-material resource.

Routing
This field displays routing ID number.

Version
This field displays the version number of the routing.

Org
This field displays the plant organization ID number.

Actual Start Date
This field displays the actual start date and time.

Status
This field displays the batch status.

Planned Hours
This field displays the amount of planned use of the non-material resource.

Actual Hours
This field displays the actual amount of time the non-material resource is in use.

Variance
This field displays the variance, in percentage, between the planned and actual use of non-material resource.

Resource Usage Form - Special Menu

Resource Variance Details
Select this option to view the Resource Variance Details form.

Resource Usage Details
Select this option to view the Resource Usage Details form.
Resource Usage Details Form

Use this form to view further details on resource usage.

Resource Usage Details Form - Fields

Organization
This field displays the plant organization code.

Resource
This field displays the resource’s ID code.

Routing
This field displays the routing ID code.

Batch
This field displays the batch ID code.

Usage Details Panel

The fields in this section display resource usage detail information.

Operation
This field displays the code for the operation that the resource performed. Operations are steps in the routing. Operation codes are set up on the Operations form.

Activity
This field displays the activity which the operation performed.

Planned Count
This field displays the planned number of resources used to perform the operation.

Actual Count
This field displays the actual number of resources used to perform the operation.

Planned Usages
This field displays the planned number of usage hours for the resource.

Actual Usages
This field displays the actual number of usage hours for the resource.
**UOM**

This field displays the unit of measure in which the usage is expressed. This is usually a unit of measure of time such as HR.

**Variance**

This field displays the difference in percentage between the planned usage and the actual usage of the resource during the operation step.
# Process Operation Controls Navigator Paths

Although your system administrator may have customized your navigator, default navigation paths are described in the following tables. In some cases, there is more than one way to navigate to a form. These tables provide the most typical default path.

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**Note:** You navigate to the Submit Requests dialog box to print reports.
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