



PeopleSoft Manufacturing 8.8 PeopleBook

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PeopleSoft Manufacturing 8.8 PeopleBook

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About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
See Also	
	<i>Using PeopleSoft Applications</i>
	<i>PeopleSoft Process Scheduler</i>

PeopleSoft Manufacturing Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.
- Pages with deferred processing.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Supply Planning Multisite Material Planner and PeopleSoft Supply Planning Advanced Multisite Planner are referred to collectively in this PeopleBook as PeopleSoft Supply Planning.

PeopleSoft Application Fundamentals

The *PeopleSoft Manufacturing 8.8 PeopleBook* provides you with implementation and processing information for your PeopleSoft Manufacturing system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

These companion PeopleBooks contain information that applies specifically to PeopleSoft Manufacturing.

- *PeopleSoft Application Fundamentals for FIN, ESA, and SCM PeopleBook*
- *PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner*
- *PeopleSoft Setting Up Procurement Options PeopleBook*
- *PeopleSoft Managing Items PeopleBook*
- *PeopleSoft Supply Chain Management Integration PeopleBook*

Pages With Deferred Processing

Several pages in PeopleSoft Manufacturing operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page—for example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

See Also

PeopleSoft PeopleTools PeopleBook: Application Designer

Common Elements Used in This PeopleBook

As of Date	The last date for which a report or process includes data.
Description	Freeflow text up to 30 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Language or Language Code	The language in which you want the field labels and report headings of the reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.
Report ID	The report identifier.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Run Control ID	A request identification that represents a set of selection criteria for a report or process.
User ID	The system identifier for the individual who generates a transaction.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your company's structure and processing options.

Short Description	Freeflow text up to 15 characters.
Standard Unit of Measure (UOM)	A type of unit used for quantifying in PeopleSoft systems, and usually associated with items. Depending on the application, units of measure might describe dimensions, weights, volumes, or amounts of locations, containers, or business activities. Examples include inches, pounds, work hours, and standard cost dollars.
Unit (business unit)	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

See Also

PeopleSoft PeopleTools PeopleBook: Using PeopleSoft Applications

PeopleSoft PeopleTools PeopleBook: Process Scheduler

PART 1

Setting Up PeopleSoft Manufacturing

Chapter 1
Getting Started with PeopleSoft Manufacturing

Chapter 2
Understanding PeopleSoft Manufacturing

Chapter 3
Defining Your Business Unit Structure

Chapter 4
Establishing Production Calendars

Chapter 5
Integrating with Third-Party Systems

Chapter 6
**Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™
(Version 8.0 or 8.5)**

CHAPTER 1

Getting Started with PeopleSoft Manufacturing

This chapter provides an overview of PeopleSoft Manufacturing and discusses:

- Recognizing your business structure.
- PeopleSoft Manufacturing integration points.
- PeopleSoft Manufacturing implementation.

Understanding Your Enterprise Data Flow

PeopleSoft Manufacturing consists of a tightly knit, functionally rich suite of applications that streamline, automate, and augment your business processes to provide a comprehensive, global supply chain management solution.

Note. PeopleSoft Manufacturing combines products previously released as PeopleSoft Bills and Routings and PeopleSoft Production Management.

PeopleSoft Manufacturing includes these applications:

- PeopleSoft Cost Management
- PeopleSoft Engineering
- PeopleSoft Quality
- PeopleSoft Inventory
- PeopleSoft Flow Production

All PeopleSoft Manufacturing applications are seamlessly linked. In other words, data is shared among all applications. PeopleSoft Manufacturing also uses data defined in other PeopleSoft applications, such as PeopleSoft Product Configurator, PeopleSoft Purchasing, PeopleSoft Asset Management, PeopleSoft Accounts Payable, and PeopleSoft General Ledger.

Recognizing Your Business Structure

The first goal with your newly installed PeopleSoft Manufacturing application is to design the system. You'll define the shop floor and inventory structure, and the costing and accounting rules, as if you were developing your own in-house system from scratch—without writing all the code. We've already anticipated the features and functionality you'll need through our application tables, so all you do is “fill in the blanks,” or rather, fill in the tables, as you add business units.

Before you set up the tables, you'll need to make some key decisions regarding how you want to define the system. As you begin making implementation decisions, consider:

- Whether items will be tracked using lots or serial numbers.
- Whether you want to use location accounting to financially account for inventory movement. If so, you'll assign different general ledger inventory accounts to each storage area and production area.
- Whether you have government-mandated requirements for reporting financial results that differ from your corporate chart of accounts.
- How you want to set up your storage level configuration for the business unit.
- Which storage areas will be WIP locations to maintain component supply for production.
- Which storage locations will contain non-owned stock.
- Whether you'll use consigned inventory from suppliers.
- Whether you'll track production using discrete orders (production IDs) or track production quantities as they're completed.
- Whether any of the production processes will be outsourced to a subcontractor. You must use production IDs to implement those subcontractor processes.
- Whether or not you want to specify automatic revision control for an item.

Note. If your organization requires ECOs, change control, and document management for prototyping new items or modifying existing bills of material (BOMs), consider installing PeopleSoft Engineering. Please contact your account manager for further information regarding this application.

See

See *PeopleSoft Inventory 8.8 PeopleBook*, “Preparing to Implement PeopleSoft Inventory,” Setting Up Location Accounting.

See *PeopleSoft Inventory 8.8 PeopleBook*, “Preparing to Implement PeopleSoft Inventory”.

Additional Considerations for Consumer Products

If you're using consumer products, consider:

- If you define effective-dated BOM/routing combinations (also known as production options).
- If you generate co-products and by-products as part of your production process.

See [Chapter 15, “Defining Production Options,” page 313](#).

Additional Considerations for Landed Costs

If you're using landed costs, consider which non-material components of an item's cost (freight, insurance) you want to track separately.

Additional Considerations for PeopleSoft Quality

If you're using PeopleSoft Quality, consider:

- The processes for which you are going to collect quality information.
- The type of characteristics (variables, defects) you want to measure for your process.
- Whether you are going to integrate with PeopleSoft Quality through PeopleSoft Manufacturing, PeopleSoft Inventory, or PeopleSoft Purchasing.
- Whether you want to pass quality control information from your current data collection devices to PeopleSoft Quality.

See *PeopleSoft Quality 8.8 PeopleBook*, "Integrating PeopleSoft Quality With Other PeopleSoft Applications".

Additional Considerations for PeopleSoft Engineering

If you're using PeopleSoft Engineering, consider:

- What are the procedures for introducing new products and enhancing existing products?
- Do you intend use ECRs and ECOs?
- Do you collaborate with suppliers on outsourced products? Will you use PeopleSoft Engineering self-service applications for this?
- How will you manage your BOMs and routings within PeopleSoft Engineering?
- Will the master version for BOMs and routings be kept in PeopleSoft Engineering or only "in-process" development?
- Are you using a third-party vendor for product development that needs to feed BOMs into PeopleSoft Engineering? If so, you'll need to use the PDM EIP.
- Will you use mass maintenance to modify BOMs?
- Do you require revision control? This impacts how items are set up, as well as revisions and decisions regarding the use of auto-revision control during mass maintenance.
- Will you have Documentum installed or will you use attachments to track design documents within PeopleSoft?

Additional Considerations for Integrating to Third-Party Systems

PeopleSoft Manufacturing integrates to third-party data collection, product data management, item content provider, and manufacturing execution systems. If you integrate to a third-party application, consider:

- If you use electronic data collection and which type of device you'll use, radio frequency, wedge, or batch.
- If you integrate to a third-party system and which of the integration points you'll implement.
- If you use a MES or any other third-party systems to publish messages, and whether you'll use chunking to distribute messages. For example, you can distribute production order data to different business units.

- Additionally, you must activate the messages and set up message nodes. You also can optionally set up chunking for “publish” messages.

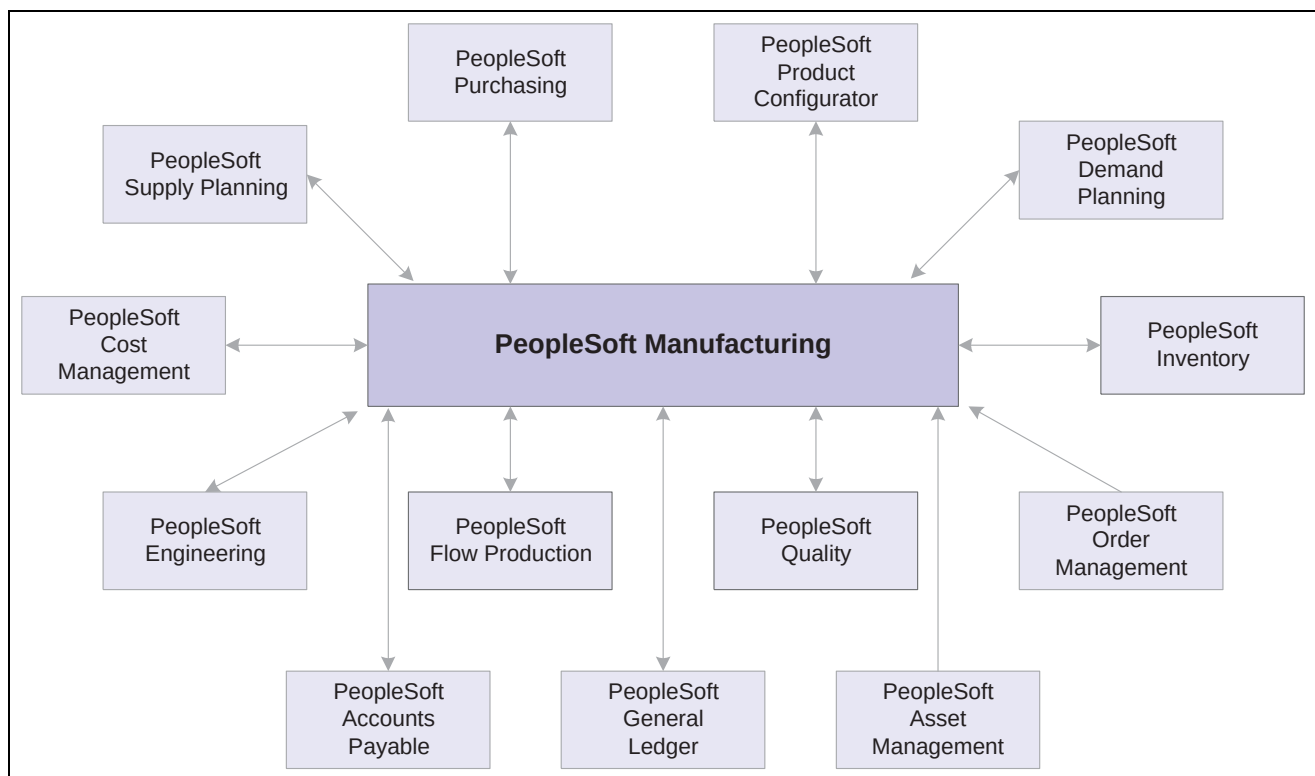
See [Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),”](#) page 65.

See [Chapter 5, “Integrating with Third-Party Systems,”](#) page 57.

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, “Managing PeopleSoft Supply Chain Management Integration Points”.

PeopleSoft Manufacturing Integrations

PeopleSoft Manufacturing integrates with these PeopleSoft applications:



How PeopleSoft Manufacturing integrates with other PeopleSoft applications

We discuss integration considerations in the appropriate chapters in several PeopleSoft PeopleBooks.

PeopleSoft Asset Management

PeopleSoft Manufacturing enables you to track assets and maintain service schedules by optionally linking asset information from PeopleSoft Asset Management to machine and tool resources in PeopleSoft Manufacturing.

PeopleSoft Cost Management

PeopleSoft Cost Management defines the costing and accounting structure for all PeopleSoft Manufacturing operations. Various costing methods can be defined for an item, such as: standard, actual, perpetual, retroactive, and periodic cost. Robust cost analytics are provided to help you analyze your costs.

PeopleSoft Engineering

As part of our design-to-deploy solution, if you have PeopleSoft Engineering installed, you can take advantage of the integration between PeopleSoft Manufacturing and PeopleSoft Engineering to:

- Maintain both engineering BOMs and manufacturing BOMs.
- Maintain both engineering and manufacturing routings.
- Transfer BOMs and routings between PeopleSoft Manufacturing and PeopleSoft Engineering.
- Maintain document versions.
- Make mass changes to manufacturing BOMs using ECOs.
- View engineering change orders (ECOs).

PeopleSoft Flow Production

If you are using PeopleSoft Flow Production, you can use streamlined replenish techniques to replenish production materials. Material can be replenished from an inventory location, feeder line, or supplier.

PeopleSoft Inventory

PeopleSoft Manufacturing uses PeopleSoft Inventory to define item attributes, issue raw materials and subassemblies, and to store finished goods. The system automatically notifies PeopleSoft Inventory to replenish the WIP location when material is consumed and falls below user-defined levels during the backflush process.

PeopleSoft Manufacturing accesses these in PeopleSoft Inventory:

- Approved items in creating a BOM.
- Approved items, item groups, and item families in the creation of master routings.
- Material storage locations used to assign work in process (WIP) locations to work centers.

PeopleSoft Product Configurator

PeopleSoft Product Configurator accesses routing information from PeopleSoft Manufacturing. The production configuration process takes the detailed configuration information captured during order management and sends requirements to PeopleSoft Manufacturing.

PeopleSoft Order Management

PeopleSoft Manufacturing can receive configured production orders created in PeopleSoft Order Management using PeopleSoft Product Configurator. PeopleSoft Manufacturing produces finished goods to fulfill orders taken by PeopleSoft Order Management.

PeopleSoft Purchasing

PeopleSoft Manufacturing accesses vendor information from PeopleSoft Purchasing for subcontracted tasks and operations on a routing, as well as for PeopleSoft Engineering. PeopleSoft Purchasing works closely with PeopleSoft Manufacturing to manage subcontracting operations. Once production has been released, you can select the production IDs with subcontracted operations and send the information to PeopleSoft Purchasing where purchase orders will be created. PeopleSoft Purchasing is used to provide raw materials for manufacturing.

PeopleSoft Quality

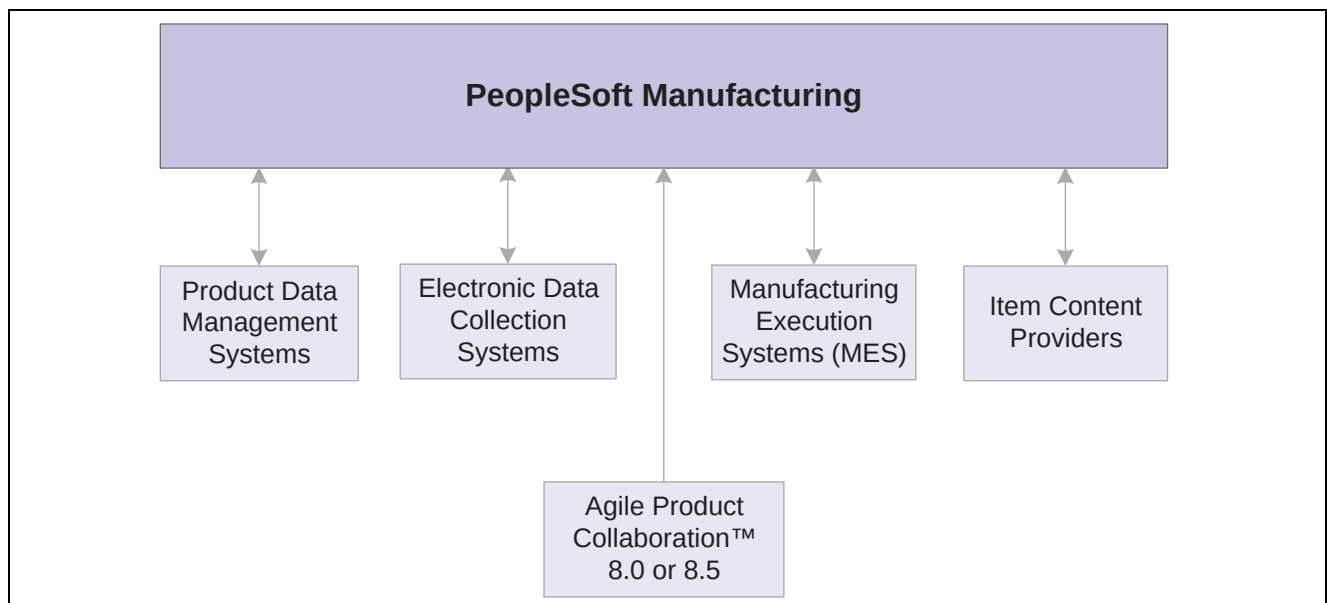
PeopleSoft Quality is used to record quality metrics during the manufacturing phase. PeopleSoft Quality accesses, from PeopleSoft Manufacturing, machine information to define machine stations where samplings occur and work center information to define work centers where samplings occur. If your installation includes PeopleSoft Quality, and you have defined quality configuration information and quality plans in PeopleSoft Quality for the manufactured item and its process, PeopleSoft Manufacturing enables you to transfer completions data to immediately initiate a quality data entry session in PeopleSoft Quality. Alarms will be triggered when PeopleSoft Quality identifies out of tolerance situations.

PeopleSoft Supply Planning

As part of our plan-to-produce solution, PeopleSoft Supply Planning accesses both planning BOMs, manufacturing BOMs, and routing and master routing information (work center, task, and operation) from PeopleSoft Manufacturing for supply planning and scheduling purposes.

PeopleSoft Manufacturing and Third-Party Systems

This diagram illustrates PeopleSoft Manufacturing integrations with third-party systems using enterprise integration points (EIPs):



How PeopleSoft Manufacturing integrates with third-party systems

See [Chapter 5, “Integrating with Third-Party Systems,”](#) page 57.

See [Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),”](#) page 65.

Supplemental information about other third-party application integrations is located on the PeopleSoft Customer Connection website.

PeopleSoft Manufacturing EIPs

This section discusses the EIPs used by PeopleSoft Manufacturing to send and receive information.

EIP Name	Description
Actual Hours (PRODUCTION_ACTUAL_HOURS)	You may also want to record actual hours information associated with specific production, and this information may have been captured by a third-party system. Use the Actual Hours EIP to import actual hours information from third-party systems. This is an inbound, asynchronous message. See Chapter 23, “Completing Operations and Recording Scrap,” page 521.
Bill of Material (BOM_SYNC)	If you use a third-party item content provider or product data management system to manage BOMs, use this EIP to import updates to engineering and manufacturing BOMs from an external system. This is an inbound, asynchronous message. See <i>PeopleSoft Engineering 8.8 PeopleBook</i>, “PeopleSoft Engineering Overview”.
Bill of Material (PDX_MSG)	Import item, revision, and BOM information from Agile Product Collaboration™ 8.0 or 8.5. This is an inbound, asynchronous message. See Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5).” page 65.
Item Master (ITEM_SYNC)	Import item information. This is an inbound, asynchronous message. See Chapter 8, “Maintaining Bills of Material,” page 147. See <i>PeopleSoft Engineering 8.8 PeopleBook</i>, “PeopleSoft Engineering Overview”.
Production Completions (PRODUCTION_ORDER_COMPLETION)	If you use a third-party system to record completions for your production, use this EIP to import information into PeopleSoft Manufacturing. This is an inbound, asynchronous message. See Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” page 585.
Production Order Issue (PRODUCTION_ORDER_ISSUE)	Use this EIP to import edit or issue component information from a third-party system. This is an inbound, asynchronous message. See Chapter 23, “Completing Operations and Recording Scrap,” page 521.

EIP Name	Description
Production Order Sync (PRODORDERSYNC)	Use this EIP to import and export and synchronize production orders created in PeopleSoft Manufacturing with any external systems. This is an inbound or outbound, asynchronous message. See Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371. See <i>PeopleSoft Supply Chain Management Integration 8.8 PeopleBook</i>, “Managing PeopleSoft Supply Chain Management Integration Points”.
Production Order Update (PRODUCTION_ORDER_UPDATE)	Use this EIP to export production order or production schedule changes to an external system. This is an outbound, asynchronous message. See Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371. See <i>PeopleSoft Supply Chain Management Integration 8.8 PeopleBook</i>, “Managing PeopleSoft Supply Chain Management Integration Points”.
Production Picking (PRODUCTION_PICKING)	Import picking information from third-party systems. This is an inbound, asynchronous message. See Chapter 22, “Issuing Material to Production,” Issuing Material Using Electronic Data Collection, page 513.
Production Serial Association (PRODUCTION)_SERIAL_ASSOCIATION)	Use this EIP to import production genealogy information from an external system. This is an inbound message. See Chapter 16, “Using Serial Genealogy in PeopleSoft Manufacturing,” page 335.

PeopleSoft Manufacturing Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Manufacturing also provides component interfaces to help you load data from your existing system into PeopleSoft Manufacturing tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	Reference
Automatic Serial Numbers	AUTO_SERIAL_NUM_CI	See <i>PeopleSoft Managing Items 8.8 PeopleBook</i> , “Defining Items”.

Component	Component Interface	Reference
Production Conversion Codes	CE_CONCODE_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Defining the Cost Foundation for Makeable Items”.
Costing Conversion Overhead Rates	CE_CONV_OH_RATE_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Defining the Cost Foundation for Makeable Items”.
Conversion Rates	CE_CONV_RATE_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Defining the Cost Foundation for Makeable Items”.
Forecasted Purchase Costs	CE_FCST_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Defining the Cost Foundation for Makeable Items”.
Additional Costs by Item	CE_ITEMEXP_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Defining the Cost Foundation for Makeable Items”.
Conversion Overhead Codes	CE_OHCODE_CODE_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Defining the Cost Foundation for Makeable Items”.
Bill of Material Privileges	EN_IC_BOM_PRIV_CI	See Chapter 8, “Maintaining Bills of Material,” page 147.
Item Price Markup	MARKUP_PCT_INV_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Managing Transfers”.
Production Replenish Locations	REPL_LOCATION_CI	See Chapter 22, “Issuing Material to Production,” page 481.
Item Transfer Price	STD_PRICE_INV_CI	See <i>PeopleSoft Managing Costs 8.8 PeopleBook</i> , “Managing Transfers”.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft PeopleTools: PeopleSoft Setup Manager PeopleBook

PeopleSoft PeopleTools: PeopleSoft Component Interfaces PeopleBook

CHAPTER 2

Understanding PeopleSoft Manufacturing

This chapter gives an overview of PeopleSoft Manufacturing and discusses:

- Solutions for your production management challenges.
- Solutions for your product development challenges.
- Support for the consumer product industry.
- Flow production.
- Discrete manufacturing.
- Repetitive methodology.
- Configured orders.
- Third-party integration.
- Additional manufacturing functionality.

PeopleSoft Manufacturing

To maintain a competitive advantage in today's global marketplace, you need a single software solution to manage and synchronize your entire supply chain. PeopleSoft Manufacturing consists of a tightly knit suite of applications that streamline, automate, and augment your business processes to provide a comprehensive, global supply chain management solution.

PeopleSoft takes an innovative approach to addressing today's manufacturing issues by incorporating into our standard system design such functionality as:

- Synchronization of planning and execution throughout the supply chain.
- Process-based, event-driven design.
- Realtime, multiple-constraint-based planning.
- Flexible, hybrid manufacturing model.

PeopleSoft Manufacturing incorporates key technology and functionality including embedded workflow, realtime planning, mixed-mode production, multimedia attachments, and document attachments.

Solutions for Your Production Management Challenges

The core mission of a production management system is to provide consistent, well-defined execution and control of your manufacturing processes. It must provide accurate, up-to-date information and be flexible to accommodate and manage rapid change. It requires the integration of everything from product planning and purchasing, to maintaining bills of material (BOMs), to inventory planning, and quality control.

The PeopleSoft Manufacturing business solution breaks out of the old paradigm by synchronizing planning and execution throughout your enterprise, enabling you to respond quickly to customer requests and order changes. One of the features the PeopleSoft Manufacturing production management business solution provides is on-demand planning capability. You can perform what-if scenarios without affecting actual data and without running optimization. With up-to-the-minute precision, you can schedule and dispatch production by production area or work area and accurately track production completions and work-in-process. You also have visibility of incoming purchase orders and allocation of inventory. The comprehensive plan-to-produce solution that PeopleSoft provides includes powerful core functionality such as backflushing, shift reporting, subcontracting, multiple cost sets, cost roll-ups, Just-In-Time (JIT) support, and serial and lot tracking.

PeopleSoft Manufacturing Production Management Business Solution Applications

The PeopleSoft Manufacturing production management business solution provides an integrated suite of applications that enables you to improve the efficiency of your supply planning and management processes. Whether your production is discrete, repetitive, make-to-order, assemble-to-order, make-to-stock, or mixed-mode, this PeopleSoft business solution enables you to plan and manage your processes flawlessly. Enterprise-ready applications give the people in your organization swift, efficient access to the information that they need at every level of your enterprise.

The PeopleSoft Manufacturing production management business solution includes:

- PeopleSoft Manufacturing
- PeopleSoft Supply Planning
- PeopleSoft Inventory
- PeopleSoft Quality
- PeopleSoft Cost Management
- PeopleSoft Engineering
- PeopleSoft Flow Production

PeopleSoft Manufacturing

Within PeopleSoft Manufacturing, you can dynamically maintain complex product structures or bills of material (BOMs), resources, work centers, tasks, and routings. In addition to the basics, such as revision control, component yield, and master routings, PeopleSoft Manufacturing streamlines and enhances key administrative engineering processes through innovative technology. For example, you can automate approvals and controls between engineering and manufacturing and attach multimedia representations and instructions to complex operation steps.

To complete important tasks such as forecasting, material planning, allocating materials to production, or doing cost roll-ups, you need accurate and reliable BOMs. PeopleSoft Manufacturing enables you to manage all your complex product and process structures and multiple subcontracting and nonsubcontracting scenarios.

You can easily and efficiently:

- Set up, maintain, and run inquiries and reports on your BOMs.
- Copy and delete BOMs and routings.
- Detect looping BOMs.
- Define master routings.
- Obtain crucial BOM costing data.
- Control BOMs by revisions or by effectivity dates.
- Generate automatic revisions.
- Manage revision, BOM, and routing documents with secure versioning using seamless enterprise document management integration.
- View engineering pending engineering change order (ECO) data on PeopleSoft Manufacturing revisions, BOMs, and routings pages, if you have PeopleSoft Engineering installed.
- Specify alternate BOMs for an item, define production options (effective-dated BOM and routing combinations), and define and track multiple outputs (co-products and by-products) throughout the system.
- Define specific component revisions to be associated with an assembly, define substitute items, plan for the end of life of components and the beginning of life for their replacements (use up effectivity), create rework BOMs, and indicate that a component could be a potential output from a teardown order.

Once you decide what product you are going to produce, use the detailed routings (including scheduling options, cost codes, tasks, and routing times) and work centers with their associated resources (crews, machines, tools) in PeopleSoft Manufacturing to specify how you are going to build the product. You can maintain crew, machine, and tool data, by incorporating a multitude of multimedia attachments and text.

PeopleSoft Manufacturing works seamlessly with PeopleSoft Engineering, PeopleSoft Cost Management, PeopleSoft Supply Planning, PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft Asset Management. Use with PeopleSoft Engineering to transfer BOMs and routings from manufacturing to engineering or engineering to manufacturing by approved engineering change order or by assembly item. You can also make mass BOM changes.

In the manufacturing environment, tight operating margins and rapid change demand agility. New technology, re-engineered processes, and constantly changing customer requirements must be reflected in the way that you do business. To keep up with the demands of the marketplace, you need a flexible system that accommodates and manages rapid change.

As the core application in our plan-to-produce solution, PeopleSoft Manufacturing responds with the most adaptable solution in the industry, leveraging the latest technology to improve the efficiency of your production processes. The system synchronizes planning and execution throughout your enterprise enabling you to respond quickly to customer requests and order changes. You can manage production for discrete, repetitive, make-to-order, and hybrid environments. Robust core functionality such as backflushing, shift reporting, subcontracting, JIT support, and serial and lot tracking enables you to shape your production functions to match the way you organize your business.

You can use PeopleSoft Manufacturing to establish the foundation of the system based on multiple transaction processing entities (business units). You have the ability to centralize or decentralize certain key business functions. To minimize data redundancy and promote standardization, you can set up data, such as items, to be shared among multiple business units.

PeopleSoft Supply Planning

PeopleSoft Supply Planning is one of the keys to advanced planning and scheduling (APS) capabilities for optimizing the supply chain and providing true asset optimization at the plant level. An efficient supply planning system provides responsiveness to customers, reduces planning cycle time, and enables the plant to respond to continuous change. PeopleSoft Supply Planning provides an APS system that enables realtime optimization of plant-level procurement and production.

PeopleSoft Supply Planning enables you to weigh your constraints (such as cost, lead time, capacity, material, and inventory) that may affect your ability to respond to your customer. It can simultaneously optimize material, aggregate capacity, safety stock, as well as customer requested and scheduled ship dates producing down-to-the-second production schedules.

PeopleSoft Inventory

PeopleSoft Inventory is a robust application that is a vital part of the PeopleSoft business solutions. With PeopleSoft Inventory, you have the means to a flexible, comprehensive solution to your enterprise's dynamic needs. Seamless integration capabilities, powerful tracking, analysis and reporting tools, sophisticated item maintenance and storage location features, all combine to provide timely, accurate information, and flexible, easy-to-use features.

PeopleSoft Inventory and cost managers shall find the versatility inherent in PeopleSoft Inventory especially appealing, as the system offers multiple, proactive methods to reach your materials management, distribution, and manufacturing goals.

PeopleSoft Inventory also makes extensive use of PeopleSoft Workflow. Specifically, PeopleSoft Inventory uses PeopleSoft Workflow to route item approvals to appropriate role users. PeopleSoft Workflow works in conjunction with item approval processing. A scheduled background process scans the database for unapproved items and sends an electronic message to the appropriate role user. PeopleSoft Workflow also supports hierarchical approval processing, sequentially routing an approval item to multiple users. Hierarchical approval is an example of business process flow management, an important feature of PeopleSoft Workflow.

PeopleSoft Quality

Today, manufacturing companies face competitive pressures that they have never faced before, including shorter product life cycles, reduced cycle time, international standards, and the production of a quality product. As competition intensifies, there is a greater need for more information to help improve your product quality and overall plant productivity.

One of the ways that you can out perform your competitors is by effectively managing your quality information. Quality information is extremely valuable if you pay attention to it and use it properly. Acting upon the quality information that you collect can prevent you from having excessive scrap, rework, and rework repair costs. You need a system that provides timely quality information to the production floor personnel, so that they can react before a process gets out of control. Use PeopleSoft Quality to regain control of your processes, automate labor intensive tasks, improve communication within your enterprise, and accelerate your ISO 9000 certification.

PeopleSoft Quality combines online statistical process control (SPC) data collection with the power of a relational database for unparalleled quality analysis. Use PeopleSoft Quality to configure your process environment, but you can also use industry standard quality controls or create your own, monitor process performance, and perform online quality data analysis using the interactive tools in PeopleSoft Quality.

PeopleSoft Cost Management

To operate a business successfully, you must have a complete costing solution. As part of both our product development and production management solutions, PeopleSoft Cost Management provides all of the necessary features to effectively manage your cost functions in your environment. With PeopleSoft Cost Management you can define your cost foundation, manage product costs, cost and create accounting lines for financial-related inventory transactions, and easily analyze financial transactions and manufacturing variances.

The intuitive, easy-to-use pages, cost inquiries, and reports in PeopleSoft Cost Management provide you with the required information to perform your daily activities quickly and efficiently.

PeopleSoft Engineering

PeopleSoft Engineering helps you manage the product introduction and change process throughout your enterprise in a dynamic design-to-deploy business solution. Powerful features such as ECOs, engineering change requests (ECRs), engineering bills of materials (EBOMs), engineering routings (ERTGs), item revisions, substitute items, and automated workflow perform together to optimize your engineering and manufacturing process.

See [Chapter 2, “Understanding PeopleSoft Manufacturing,” Suite of PeopleSoft Product Development Business Solution Applications, page 18.](#)

PeopleSoft Flow Production

PeopleSoft Flow Production focuses on streamlined shop floor execution. Define replenishment attributes to provide a powerful automated tool for signaling replenishment and moving material within the supply chain. The goal is to effectively communicate production and material replenishment signals using a variety of methods, most notably by creating and scanning Kanban cards and labels; routing replenishment requests using Kanban cards, workflow, Pull Lists, and Pull Tickets; or triggering replenishment through completions.

See *PeopleSoft Flow Production 8.8 PeopleBook*.

Solutions for Your Product Development Challenges

The core mission of a solution designed to manage product development is to effectively manage the communication of information between product and manufacturing engineering and the shop floor. No matter how small or large the organization, an efficient engineering process (or product design-to-deploy process) is vital in the search for manufacturing excellence. This is critical when attempting to create both a profitable product line to ensure customer and vendor satisfaction. While the development of the manufacturing process is the responsibility of product or manufacturing engineering, it must be done with input from production to include valuable information regarding process practicality. Such a team approach yields better results and provides for a higher quality and more efficient manufacturing process.

The PeopleSoft Product Development business solution places you in control of your current engineering environment by providing each individual in the engineering process access to the information that they need, as well as the ability to accurately pass that information through each phase of the product development life-cycle. This workflow driven solution enables engineers to proactively process new product introductions from concept through detailed design through prototyping and into full-scale production. Post-release engineering change requests resulting from product defects, enhancements, material and component and substitutions are also effectively managed. The business solution for managing product development is flexible enough to be tailored to meet the unique requirements of your business; yet, it clearly provides the necessary structure to manage this complex process.

Robust Functionality

With the PeopleSoft Product Development business solution, you can define and maintain ECRs, robust ECOs, EBOMs, ERTGs, and item revisions.

You can manage documents with secure versioning and a supported computer-aided design (CAD) viewer. Clicking one field sets up the integration to Documentum™. You accurately control product revision history, always associating or accessing the correct documents for the appropriate revision.

You can also roll up and calculate the cost of new or changed products, make mass BOM changes, incorporate PeopleSoft Workflow, and much more.

All of your work safely resides in an independent engineering workbench that isolates changes from production data. You can transfer BOMs and routings to manufacturing either by assembly item or by approved ECO. Do this according to your specific business needs, because you need information that reflects how your business operates.

Integrated Process-Oriented Solution

Our tightly integrated Product Development business solution gives your entire enterprise easy access to design changes and proposals, thereby improving concurrent engineering activities throughout the supply chain. Engineering, planning, costing, quality, shop floor, marketing, customer service, as well as suppliers and customers can all use one tool set and user interface to access crucial product development data when they need it. All this enables your company to get your products to market quickly and efficiently. By efficiently incorporating customer requests for new products or existing product changes, you increase the likelihood of having very satisfied customers.

Our process-oriented approach enables you to view your data in terms of your business processes rather than as raw transactions. This makes it easy for managers and directors at all levels to access the information that they need to help them meet their operational objectives.

Suite of PeopleSoft Product Development Business Solution Applications

PeopleSoft responds to your product development management needs by providing a suite of enterprise-ready applications. These applications help you manage the design-to-deploy business processes by enabling you to manage the flow of information between product and manufacturing engineering and production.

The PeopleSoft Product Development (or design-to-deploy) business solution includes these applications:

- PeopleSoft Manufacturing

- PeopleSoft Cost Management
- PeopleSoft Inventory
- PeopleSoft Engineering

PeopleSoft Engineering

Effectively managing product changes and introducing new products is critical to creating a profitable product line and having satisfied customers and vendors. PeopleSoft Engineering contributes to the product development business solution by helping you manage product introduction and change processes throughout your enterprise.

PeopleSoft Engineering provides all of the design-to-deploy features that you would expect from an engineering product: robust ECOs, ECRs, EBOMs, ERTGs, item revisions, seamless document management with secure versioning, PeopleSoft Workflow, and so forth. You can easily exchange data between PeopleSoft Engineering and PeopleSoft Manufacturing, and you can make mass BOM changes. PeopleSoft Engineering also takes the next step by streamlining and enhancing traditional processes through innovative technology. PeopleSoft Workflow automates approvals and controls within engineering and between engineering and manufacturing.

In response to diverse customer requirements, PeopleSoft Engineering provides both specific product development functionality and openness to other systems. It provides an independent engineering workbench environment consisting of EBOMs, ERTGs, ECRs, ECOs, cost roll-up capability, online EBOM comparisons, and seamless integration to a leading document management vault product. This workbench enables you to create and maintain engineering data without affecting production.

This functionality, combined with the workflow-enabled PeopleSoft architecture, enables you to manage the routing, approval, and notification of ECRs, ECOs, and associated BOM and routing additions or changes.

Integrated Engineering Functionality

PeopleSoft Engineering helps you to manage product introduction and change processes throughout your enterprise. You can tailor the implementation and complexity of PeopleSoft Engineering to meet your business needs. You can use it to maintain new and pending product structures or to manage the engineering change order approval process throughout your organization. PeopleSoft Engineering delivers:

- An independent engineering workbench that isolates changes from production data.
- ECRs that enable you to receive, review, and maintain and then optionally convert to ECOs.
- Robust ECO functionality and complete change process support.

You can use ECOs to manage the various activities required to implement multiple types of engineering changes.

- EBOMs and item revisions that incorporate all manufacturing BOM features including a full range of inquiries, as well as online and background looping verification. You can specify both pending and approved items as components on an EBOM. In addition, you can specify component placeholders in cases where the item number isn't yet known. When managing engineering BOMs using ECOs, you can view pending ECO information within EBOM and revision pages.
- Engineering routings that incorporate all production routing features including the use of work centers, tasks, resources, and copy functions.
- Innovative PeopleSoft Navigator and PeopleSoft Workflow capability.

You can maintain and route ECOs within PeopleSoft Workflow so that multiple users can be involved in creating, reviewing, and implementing changes.

- Engineering BOM comparison.

At any point during the development process, you can compare engineering BOMs online with manufacturing BOMs or other engineering BOMs. This is available for engineering routing comparisons.

- Seamless enterprise document management integration with secure versioning.
- Tight integration with PeopleSoft Manufacturing including copying BOMs and routings or transferring them by either approved ECO or by assembly item.

You can also make mass manufacturing bills of material (MBOM) or EBOM changes from within PeopleSoft Engineering. Also, there is integration with PeopleSoft Cost Management, including the definition of engineering cost versions for cost simulations.

- A diverse set of inquiries and reports.
- The capability to specify alternate BOMs for an item and define and track multiple outputs (co-products and by-products) throughout the system.
- EBOM, ECO, and ECR data sharing with your vendors over the internet (if you have also purchased PeopleSoft Engineering.)

Vendors can view EBOMs and ECOs, as well as view and create ECRs, and use PeopleSoft Workflow to facilitate successful outsourcing.

- The capability to define specific component revisions to be associated with an assembly; automatically generate revisions; define substitute items; plan for the end of life of components and the beginning of life for their replacements (use up effectiveness); create rework BOMs; define master routings; and indicate that a component could be a potential output from a teardown order.
- Detailed variance analysis after production is complete.
- The capacity to analyze potential production variances: utilizing workflow to notify appropriate roles when variances exceed a predefined tolerance.
- The capability to define engineering-specific cost versions and related data.

You can roll up and calculate new or changed product costs, as well as estimate the cost of newly designed manufactured items.

Support for the Consumer Product Industry

Within the last decade, the speed of business in the consumer products industry has increased exponentially. To effectively capture and act on this information, consumer product manufacturers must have an integrated enterprise plan that aligns resources and schedules throughout the organization with a well-defined and reliable market strategy.

PeopleSoft has worked with leading consumer product manufacturers to deliver a comprehensive and unique solution for the industry—one that meets your specific challenges and requirements. PeopleSoft has also worked closely with customers and partners to create a solution that embodies the best practices of the most successful global manufacturers.

PeopleSoft understands the complexity of the consumer products industry. Our applications, combined with hardware, software, and services provided by our partners, deliver the solution consumer products that customers need. In addition, because your business differs from that of others in the consumer products industry, PeopleSoft offers solutions based on the products that you deliver, such as high-turn, shelf-stable, perishables, health and beauty aids, durables, packaged goods, and high margin seasonal items.

Throughout its manufacturing applications, PeopleSoft addresses the needs of the process-oriented consumer products industry by providing you with the capability to:

- Define multiple outputs, co-products and by-products (including waste and recycle by-products) that can be tracked throughout the system.
- Create up to 98 alternate BOMs and alternate routings for an item.
- Create effective-dated production options by linking specific BOM and routing combinations.

This provides multiple ways of making the same end item and controls them by effectivity dates, which is particularly useful for seasonal mix variations.

- Satisfy demand created for either the primary or co-product.

PeopleSoft Supply Planning recommends which production option to use to satisfy the demand.

- Create production IDs or schedules with an associated output list and track the completed quantities of the primary, co-products, and by-products.
- Review and report on the detailed history of specific transactions for lot-controlled items using lot trace and lot composition inquiries.

See Also

[Chapter 8, “Maintaining Bills of Material,” page 147](#)

[Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371](#)

PeopleSoft Inventory 8.8 PeopleBook, “Managing Item Lots,” Viewing Basic Details About Item-Lot Combinations for Lot Trace/Composition

Flow Production

Flow production is a JIT-based pull system that manufactures to customer order rather than to forecasts. You design your production lines and processes to produce a constantly changing mix of products at a steady rate (known as TAKT time). Utilize schedules for mixed model production instead of work orders to drive production. The schedules for the mixed models are sequenced based on customer orders and material is replenished using Kanban Cards or replenishment requests. The role of material resource planning (MRP) in flow manufacturing is primarily only for long-term planning of material and capacity requirements.

With PeopleSoft Flow Production, you can source a WIP location directly from a vendor, a feeder line, or an inventory storage location. Replenishment requirements can be communicated using workflow, email, fax, and electronic data interchange (EDI). You can use Kanban cards or replenishment requests to request that more material be sent to your WIP location. You can also import Kanban cards and replenishment requests into the system using the replenishment request EIP. Use backflushing, Kanban cards, or a manual system to trigger replenishment.

Kanban replenishment requests can be printed in two formats: pull list or pull ticket. The pull list is a list of Kanban IDs with associated details, similar to a pick list. pull tickets are similar to Kanban cards in that you print one pull ticket per Kanban ID. Once you complete a pull ticket, the system changes its Kanban ID status to *complete*, which is similar to the way in which a one-time Kanban card works.

If you have PeopleSoft eSupplier Collaboration, once the replenishment request is dispatched, your vendors can view the request on the internet.

See Also

PeopleSoft Flow Production 8.8 PeopleBook, “Understanding the Flow Production Process”

Discrete Manufacturing

Typically, you use discrete manufacturing to track production by batches. PeopleSoft Manufacturing defines production batches using production IDs, production type (production, rework, or teardown), quantity, status, backward or forward scheduling, start date, and due date. PeopleSoft Supply Planning uses production IDs to plan for material and capacity usage. You can identify and track costs and variances by discrete order or batch. Production IDs also enable you to report intermediate completions at various operations in an item’s manufacturing process. In addition, production IDs let you set up any operation on the item’s routing as a subcontracted operation. You move production IDs through the manufacturing process by releasing production, recording completions, closing production, and analyzing and reporting costs and variances by production ID. You track material and conversion costs by production ID rather than day and shift.

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371

Repetitive Manufacturing

With PeopleSoft Manufacturing, you can use repetitive methodology for the repeated production of the same products or families of products. You enter quantities for a day of the week and the system determines the due date when the schedule is added, allowing you to sequence production throughout the day. You can create multiple schedule quantities per shift. You also have the option of adding a production schedule after you have completed manufacturing an item. This feature enables you to record completions for an assembly item. When you record completions, the system automatically creates the production schedule. Following backflushing, components are consumed and costs are posted for the completed quantity. The system collects costs and variances by day and shift for the production area and item combination.

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371

Configure to Order

If you use PeopleSoft Manufacturing with PeopleSoft Product Configurator, you can create make-to-order or assemble-to-order assemblies. PeopleSoft Product Configurator is a rules-based system that enables you to capture customer requirements and dynamically generate corresponding production requirements. You can define order entry pages for entering and validating configuration information. The configuration information that you enter determines the specific components and operations used in the production process.

The production configuration process takes the detailed configuration information captured during order management and sends requirements to PeopleSoft Manufacturing. The production configuration rules enable you to specify component and operation list elements dynamically without having to create standard BOMs or routings for each specific configuration. The production configuration process generates configured production IDs, component lists, operation lists, and configured costs that you can then track using a configuration code through PeopleSoft Manufacturing.

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371

PeopleSoft Product Configurator 8.8 PeopleBook

Third-Party Integration

This section discusses:

- Integration item content providers.
- Integration with other product data management systems.
- Integration with Agile Product Collaboration™ 8.0 and 8.5.
- Integration with manufacturing execution systems (MES).
- Integration with electronic data collection systems.

See Also

Chapter 5, “Integrating with Third-Party Systems,” page 57

Integration with Item Content Providers

The proliferation of web-based catalogs has provided manufacturers with an easy and effective tool to locate items with the desired specifications at the lowest cost. The traditional catalog function now comes in a variety of forms to improve business to business communication between systems. Examples include component supplier management systems, market site aggregators, independent trading exchanges, and traditional catalog providers with new web interfaces. These systems benefit the design and purchasing of new products by accelerating item location, maximizing design reuse, and reducing acquisition costs.

PeopleSoft provides an EIP to these systems, which maximizes ease of importing item data into your PeopleSoft database. Using PeopleSoft Application Messaging technology, you can keep item and vendor/item information synchronized within your PeopleSoft system. In particular, you can launch, search, and import item/vendor information from the item content provider into the PeopleSoft database.

Integration with Other Product Data Management Systems

Product data management (PDM) systems effectively and quickly track and implement new product introductions and product changes. These systems provide engineering-centric software that often pulls together CAD and product documentation, BOM and item information, ECOs, and workflow.

PeopleSoft Manufacturing enables ongoing, one-way transfer of items, item revisions, and BOMs from your third-party PDM system to PeopleSoft. Using PeopleSoft Application Messaging technology, your third-party system can publish PDM messages to PeopleSoft.

See Also

Chapter 5, “Integrating with Third-Party Systems,” page 57

Integration with Agile Product Collaboration™ 8.0 and 8.5

You can now send item, revision, and manufacturing BOM information using Agile™ change orders that originate from the Agile Product Collaboration™ web-based or Windows® applications. This is achieved through using a new PeopleSoft Adapter designed for use with Agile Product Collaboration™ (supported for versions 8.0 or 8.5 only) and is provided by PeopleSoft. This adapter makes use of the product data exchange (PDX) version 1.0 XML format for integration.

See Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” page 65.

Integration with Manufacturing Execution Systems

You can use manufacturing execution systems (MES) to enable the optimization of production activities from production order launch to completion of finished goods. MES functions include:

- Resource Allocation and Status
- Operations/Detail Scheduling
- Dispatching Production Units
- Document Control
- Data Collection/Acquisition
- Labor Management
- Quality Management
- Process Management
- Maintenance Management
- Product Tracking and Genealogy
- Performance Analysis

To facilitate the flow of information between PeopleSoft and the MES, a group of EIPs provides a flexible link between the two systems. With PeopleSoft Manufacturing, you can:

- Communicate production orders and production schedules from PeopleSoft to the MES.
- Communicate item revision information from PeopleSoft to the MES.
- Send operation and order completion and scrap information from the MES to PeopleSoft.
- Send component item usage from the MES to PeopleSoft.
- Analyze production performance in either PeopleSoft or the MES.

If you are looking for more detailed operational information, use the MES to gather this information.

You continue to use PeopleSoft Manufacturing for planning, material movement into WIP, validation of completion data, and production costing functions. PeopleSoft is the system of record for setup information, including item masters, BOMs, and routings.

Integration with Electronic Data Collection Systems

PeopleSoft Manufacturing and PeopleSoft Flow Production enable you to use a bar code scanner, wedge connected to a PC, or radio frequency device to scan data. PeopleSoft provides EIPs that feed data from PeopleSoft Manufacturing and PeopleSoft Flow Production. You can use electronic data collection with these transactions:

- Actual Hours
- Completions
- Component Issue>Returns
- Multiple Output Completions
- Kit Issues>Returns
- Production Picking
- Manual Replenishment Requests
- Kanban Transfers
- Kanban Completions
- Kanban Receiving

You can also print bar coded labels for completed items and bar code-enabled reports.

See Also

Chapter 5, “Integrating with Third-Party Systems,” page 57

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Integrating to Electronic Data Collection Systems”

PeopleSoft Collaborative Supply Management 8.8 PeopleBook, “Implementing PeopleSoft Collaborative Supply Management,” Reviewing Kanban Requests

Additional Manufacturing Functionality

Among the various features that PeopleSoft Manufacturing delivers, you can also find the item substitution, component use up, rounding rules, rework, and teardown functionality to optimize your manufacturing processes.

Item Substitution

With substitute items, you can predefine valid alternates for an item to use when that item is unavailable. Using PeopleSoft Inventory, when an ordered item is unavailable (either temporarily or permanently) the proper replacement item is automatically substituted to fill the order. When using substitute items with PeopleSoft Manufacturing, PeopleSoft Supply Planning automatically suggests the substitute item when the original is in short supply. You can define substitute items at three levels:

Item Definition (Item SetID level)	This level is primarily used for PeopleSoft Purchasing and is the default for the business unit level substitutions.
Item Attributes by Unit (BU/Item level)	This level is used by PeopleSoft Manufacturing and Inventory, and as a default for setting up BOM/EBOM level substitutions. Substitute information appears by default (optionally) at this level from the SetID level.
Maintain BOMs/EBOMs (BOM/EBOM level)	This level is used by PeopleSoft Manufacturing for all item substitutions. Information at this level appears from the business unit (BU) level.

You can define substitutes for an item in the Item Definition and Item Attributes by Unit pages and use them as defaults when maintaining components on a BOM. When defining substitutes, you can specify start and end dates, as well as a conversion factor. The conversion factor defines how many of the substitutes are required to replace the original item. You can set a priority by which the substitute item with the highest priority or lowest number is substituted first in the PeopleSoft Supply Planning solvers.

Using the Item Definition pages, you can define substitutes for an item. You can define user security and limit access to those individuals permitted to define the substitutes.

You have the option to push the item level substitutes to the Item/BU level. If you create an effective date for a substitute, the item can only be substituted within the effective to obsolete date range.

Use the BOM Maintenance Substitute page to define substitutes for BOM components. The system calculates the quantity based on the conversion factor specified (if defined at the item level) and the original item's quantity per.

You can copy the substitute list from the item attributes at the business unit level to the BOM/EBOM level. This functionality isn't available if substitutes don't exist at the BU level.

BOM inquiries include the list of substitutes for each component. Additionally, you can search for components defined as substitutes using the Component Where Used Inquiry.

When copying and transferring BOMs and EBOMs, you can also copy and transfer the substitute list for the BOM/EBOM components. Additionally, mass maintenance on the substitute list is supported.

PeopleSoft Supply Planning enables you to set the level of substitution that occurs during solving. Define these settings at the BU level:

Allow Substitution	Denotes whether the solvers can fulfill the production component demand of an item with a defined substitutes available supply.
Create Substitute Supply	Determines whether the solvers can create new supply for substitute components to resolve constraints. If this option is not checked, the substitute algorithm may only use on hand quantities. This option is only possible if substitutes are allowed in the business unit.
Check Substitute First	Determines whether the solvers will attempt to use substitute components before using alternate sourcing options. If the flag is not checked, the solver checks alternate sourcing options first before trying to use substitutes to resolve a constraint failure. This option is only possible if substitutes are available for the business unit.

PeopleSoft Supply Planning passes the list of valid substitutes to the planning engine. When the projected on-hand quantity of the primary item cannot meet the demand, the feasible and enterprise feasible solvers can use substitutions when creating new planned production, if these criteria are met:

- You selected the Allow Item Substitution option on the business unit group definition.
- You selected options for allowing substitutions during the running of the corresponding solver.
- No partially completed operations exist for the item.
- Items have not been issued for the operation.
- Item substitution is not frozen for the order.

When a production ID or production schedule is identified as frozen for substitutes, no substitution will be performed. Solvers use substitutions for dependent demand only. They do not use substitutions for end items, such as sales orders, transfers, or forecasts. Solvers consider substitute items (all of the items effective for the period considered) according to the order of their priority.

Note. PeopleSoft Supply Planning assigns higher low-level codes to substitute items rather than to primary items. This ensures that primary items are planned before substitute items.

The substitute item projected quantity on hand must meet the total demand of the substitute item quantity needed for each primary item multiplied by the conversion factor. The solvers do not use partial substitutions. If the solvers cannot meet this demand with substitutions, they plan supply for the primary item.

Note. The material solver performs substitutions only when a component is beyond its phase-out date and there is a dependent demand for the component.

Once a substitution occurs, the original item required and the substitute item are received and applied. When the system creates the component list, substitute items are distinguished from the original required component.

Using PeopleSoft Manufacturing, you can make manual substitutions during the picking process and when recording component consumption. You can also indicate a substitute on the component list in advance, viewing the list of valid substitutes for that component. Alternatively, you can request a list of valid substitutes if insufficient supply exists for the original item when generating a production pick plan. During the review plan process, you can indicate that a substitute item was picked, rather than the original.

When recording completions and scrap, you can indicate a substitute item was consumed. You can also freeze the component list to prevent further substitutes from occurring when the next planning optimization occurs.

See Also

Chapter 8, “Maintaining Bills of Material,” page 147

PeopleSoft Engineering 8.8 PeopleBook, “Maintaining Engineering Bills of Material”

Chapter 20, “Maintaining Operation Lists,” page 451

Chapter 22, “Issuing Material to Production,” page 481

Chapter 23, “Completing Operations and Recording Scrap,” page 521

Chapter 25, “Subcontracting,” page 597

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner

Component Use Up

Frequently, you may need the ability to plan for end of life of components and beginning of life for their replacements. This occurs when one component is replaced by another component for reasons such as an engineering change, a more technically advanced component, or lower cost.

Here are some examples when you might want to use this functionality:

- You want to replace a component with another component at a certain point in time, and you want the system to help plan for this occurrence.
- The system should use up the remaining stock of an old component before introducing the new component into production.
- From the key date to begin use of the new component, PeopleSoft Supply Planning needs to plan for the new component while continuing to use the old stock until such time as the old component is used up.

You can define items that are going to be used up or phased out, drive the inventory level of the use up item to zero, and then manually replace the discontinued item on the BOM with a new item. You can store the use up date for the item at the business unit level, because each business unit can discontinue items with different use up dates. Use up works in conjunction with item substitution. Once the use up item is consumed, one of the substitutes for the use up item on the BOM substitution list can replace it on that particular production order or schedule. If no substitution items are defined for the use up item and the obsolete date for the item hasn't been changed, the use up item will be short.

At the Item Attributes by Unit level, you indicate a discontinue date for the item. After this date, PeopleSoft Supply Planning does not create any planned production, purchase, or transfer orders for that item. Define two new statuses, one representing the current item status and the other representing the future status of the item. To use up the item, set the future status to *Discontinued*. When you select a future status, you also define the date that the future status becomes effective, which is the date that planning begins to use up existing supply of the item.

PeopleSoft Supply Planning verifies the current and future status for the item. If the status is set to *Discontinued*, PeopleSoft Supply Planning begins to use up the item on the date indicated.

Once used up, PeopleSoft Supply Planning uses substitution logic to determine replacement items. PeopleSoft Supply Planning calculates a projected use up date and passes it back to production. This is the date when the on-hand balance is projected to reach zero or remains constant for the duration of the planning horizon. You can use this date to initiate ECOs or BOM effective and obsolete changes for the used up item.

See Also

Chapter 8, “Maintaining Bills of Material,” page 147

PeopleSoft Engineering 8.8 PeopleBook, “Maintaining Engineering Bills of Material”

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner

Rounding Rules in Manufacturing

Numerous transactions in PeopleSoft Inventory, PeopleSoft Purchasing, and PeopleSoft Manufacturing involve converting item quantities from one unit of measure (UOM) to another. You can ensure consistency when stocking and manufacturing item quantities by establishing whole number validation rules. Whole number validation consists of two components:

Quantity precision	Specifies whether item quantities for a given UOM are expressed as whole numbers or as decimals.
Rounding	Determines how fractional values are rounded so that calculations result in whole numbers.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items”

Quantity Rounding Exceptions in PeopleSoft Manufacturing

There are three areas within PeopleSoft Manufacturing where rounding rules do not apply:

- **QPA (quantity per assembly).**
Used in BOM maintenance, planning BOM maintenance, component list maintenance, and production option maintenance. The QPA is a precision number, and therefore, should not be rounded. If rounding rules were applied, it would either understate or inflate the number of components required for production. For example, to make 2 assembly A0001s may take 1 component B0004s. Thus, when defining the BOM the QPA for B0004 would be 0.5. If we applied the rounding rules to the QPA, then it would round the QPA for B0004 to 1, and thereby incorrectly inflate the QPA and the production costs.
- **Cost Roll-Up Process.**
Applying the rounding rules to the Cost Roll-Up process causes production costs to be either understated or inflated. For example, A0007 is a component on assembly NB-5000. The QPA = 1 and the yield = 2/3. When you make one NB-5000 you need 1.5 of 0007s. If A0007 costs 1.00 USD, the cost of using A0007 is 1.50 USD. If we rounded the scheduled quantity during the Cost Roll-Up process, you would need 2 A0007s, which would incorrectly inflate the cost to 2.00 USD. Also, if A0007 is a subassembly, then we would need to explode A0007 into its component parts. The deeper the explosion, the greater impact the rounding will have. Thus, to get the most accurate cost, we don't round the component scheduled quantity.
- **PeopleSoft Supply Planning - Dependent Demand.**
You have the option to round or not round dependent demand calculations. You may decide to not round the dependent demand calculation, because rounding inflates the actual dependent demand. Rounding problems become more visible as the dependent demand explodes down more levels.

Rework

PeopleSoft Manufacturing enables you to repair or rework previously completed assemblies to replace defective components, fulfill an ECO or product recall, or to refurbish scrapped subassemblies.

Using PeopleSoft Engineering and PeopleSoft Manufacturing, you can define rework BOMs if you typically have a standard rework process that requires additional components. Rework routings enable you to define common rework processes for a large volume of rework production. As with production BOMs and routings, you can define a primary rework BOM and routing and up to 98 alternates each.

When you add a rework production ID, you select from the predefined rework BOMs and routings. When you release the rework production ID, the system automatically creates the component list with the assembly item to be reworked in addition to the components defined on the rework BOM. If you select a rework routing, the system also creates an operation list. If you don't choose a rework BOM and a rework routing, you can manually maintain the component list and operation list.

You must create rework production in the *Released* status unless the production is in the future, in which case you create *Firmed* rework production IDs. Once the rework production ID is created, you can either modify the appropriate start and due dates manually, or if capacity and material availability are concerns and you've created a component list and operation list for the rework, you can optimize the production ID using PeopleSoft Supply Planning. PeopleSoft Supply Planning considers rework requirements on a resource the same as regular production, but it won't create rework production recommendations.

In PeopleSoft Manufacturing, rework production is managed with production IDs, not production schedules. The assemblies to be reworked must be picked from non-nettable, non-WIP location, in PeopleSoft Inventory using the Kit Issue method. Additional components must use the Kit Issue method as well. PeopleSoft Supply Planning does not recommend rework production; it reschedules rework production to repair capacity constraints.

You can record completions and scrap at intermediate operations, consume the additional components, and earn labor costs associated with the rework. When you close production, any additional component costs and labor incurred is charged to the rework expense account. You can view all rework costs in PeopleSoft Cost Management.

Teardown

Often, you need to break an assembly down into its component parts and return the components to inventory. With PeopleSoft Manufacturing, you can:

- Tear down an assembly as built and as planned.
- Base a teardown production ID on an existing production ID so that the original configuration can be retrieved and torn down.
- Specify teardown components on a production BOM and a teardown routing so that you can set up a default configuration and teardown steps in advance, if no existing production ID is available.

Effects of Teardown on BOMs and Routings

When maintaining a production or engineering BOM, you can indicate whether the component could be a potential output from a teardown order. Using the check box on the Component Summary page, you designate the component as a teardown output. If you select this check box, the system automatically copies the component details to a new Teardown Outputs page when you create a new teardown order. If you do not select the check box, it indicates that the component is not an output of a torn-down assembly.

You can include teardown outputs when you copy a BOM. Additionally, you can delete the teardown outputs. All BOM inquiries include a new page used to display teardown outputs.

You can create a teardown routing. The teardown routing can differ from the production routing, but it can use any of the existing tasks or work centers defined for production. As with production routings, you have the option of having a primary teardown routing and up to 98 alternates. When copying a routing, you can copy a teardown routing to another item ID or business unit.

Effects of Teardown on Production

When you select the production type of Teardown during production ID maintenance, you indicate whether the list of teardown components is based on a previous component list or the production BOM code. Use the Transaction History search to find the original production ID used to create the item to be torn down. If multiple production IDs were used to create this item, the system generates a list of production IDs. Once you select the production ID from the list, the system copies the components designated as teardown components to the teardown production ID output list, and the assembly item is copied to the component list. You have the option of using the original operation list or you can use a predefined operation list from a teardown routing.

If there is no original production ID for the item, you use a teardown BOM and routing. When you indicate that a component is a teardown output during production BOM maintenance, the system automatically copies the component details to a teardown page. The outputs appear when the item is torn down and enables you to override the output quantity or operation sequence.

When recording completions on teardown orders, you can report the number of assemblies torn down. The system calculates the quantity of each component removed from the assembly item. In addition, because teardown components are reported at any operation, you are provided the functionality necessary to report teardown completions. You can route the teardown components to another production ID, back to stock, or to a container in the same manner as any completed item. You can reassign lot and serial numbers for the components.

The system uses a teardown variance type to collect any additional expenditure from tearing down the assembly, as well as to account for lost conversion costs.

Yield by Operation

Operation yield allows you to specify the quantity of goods expected to make it through the process. The expected loss can then be incorporated into the cost of the usable end items. Additionally, PeopleSoft Supply Planning can take into account process yield and increment the demand by the expected loss to ensure that demand will still be met once the manufacturing process is complete. This function enables you to specify a yield percentage on the routing operation step and calculates the additional resources necessary to meet the scheduled quantity with the anticipated yield loss.

Serial Genealogy

PeopleSoft Manufacturing enables you to trace the location and constituent components of finished goods items and to trace source and usage of component parts during the production process. Serial genealogy tracks the source and destination of any serialized item. A serialized item may be used in a serialized assembly, scrapped, or used in a higher level serialized assembly that is then shipped to a customer.

CHAPTER 3

Defining Your Business Unit Structure

This chapter gives an overview of business units and tells you how to define your manufacturing business units.

Understanding Business Unit Structures

PeopleSoft defines a business unit as an operational subset of your organization enabling you to plan your operations around the way you really work.

Before you implement PeopleSoft Manufacturing for your organization, take a close look at how your business functions operationally. You'll want to decide how you want to map your operational business structures, including storage locations, bills of material, routings, costs, and procedures, into PeopleSoft Manufacturing.

Prerequisite

You must define your PeopleSoft Inventory business unit before creating manufacturing business units.

See *PeopleSoft Inventory 8.8 PeopleBook*, "Defining Your Operational Structure in PeopleSoft Inventory".

Establishing Manufacturing Business Units

To define business unit options for your manufacturing business unit, use the Manufacturing Options component.

Prior to using PeopleSoft Manufacturing, define your manufacturing business units and set parameters such as default rate maintenance and BOM online verification. If you are using PeopleSoft Engineering, you'll also define how you want to manage your engineering BOMs.

There are several ways you can set up PeopleSoft Manufacturing to run your enterprise. Your choices affect which pages you'll be able to access, how you maintain or present certain data, and how transactions work.

Pages Used to Establish Manufacturing Business Units

Page Name	Object Name	Navigation	Usage
Business Unit Definition	BUS_UNIT_MFG1	Set Up Financials/Supply Chain, Business Unit Related, Manufacturing, Manufacturing Definition	Define manufacturing business units.
MFG Business Unit Options	BUS_UNIT_OPT_MG	Set Up Financials/Supply Chain, Business Unit Related, Manufacturing Options, MFG Business Unit Options	Set up manufacturing business unit options.
MFG BU Prdn Options	BUS_UNIT_OPT_MG_2	Set Up Financials/Supply Chain, Business Unit Related, Manufacturing Options, MFG BU Prdn Options	Set up manufacturing business unit production options.
Auto Revision Scheme	EN_REVISION_SCHEME	Set Up Financials/Supply Chain, Business Unit Related, Manufacturing Options, Revision Scheme	Define automatic revision schemes at the manufacturing business unit level.
BOM Message Defaults	EN_BOM_MSG_DFLT	Set Up Financials/Supply Chain, Business Unit Related, Manufacturing Options, BOM Message Default	Set manufacturing business unit defaults for BOM messages received from a third-party Product Data Management System.

Defining Manufacturing Business Units

Access the Business Unit Definition page.

Important! Manufacturing business units must be identical to PeopleSoft Inventory business units to link the manufacturing and inventory processes.

To define your manufacturing business unit:

1. Enter a Description and Short Desc (short description) of the manufacturing business unit.
The Inv Business Unit (inventory business unit) is display-only.
2. Indicate whether your facility Status is *Open* or *Closed*.

Note. You must set your facility status to *Open* to manage production or add bills of material or routings.

Setting Up Manufacturing Business Unit Options

Access the MFG Business Unit Options page.

MFG Business Unit Options	MFG BU Prdn Options	Auto Revision Scheme	BOM Message Default
Unit: US008			
Rate Maintenance / Defaulting ☒ By Work Center ☐ By Task		Online BOM Verification ☐ Always Verify Online ☒ Never Verify Online	
Default Calendar Codes Production Calendar Code: DEFAULT Q Run-time Calendar Code: DEFAULT		BOM Usage Defaulting ☒ Revision Control ☒ Auto Revision ☐ By Effectivity Date ☒ By Revision	
BOM Maintenance Settings ☒ Allow Blank Component Revision ☒ Default Component Revision ☒ Default Teardown BOM Component ☒ Components Align with Revision			

Manufacturing Options - MFG Business Unit Options page

Rate Maintenance/Defaulting

Use the Rate Maintenance/Defaulting group box if you want to enter conversion rates for work centers or tasks.

If you determine your labor, machine, and overhead rates/costs by department or cost center, set this option to By Work Center and all tasks assigned to the work center will use the same conversion rates and overhead rates. If you determine rates/costs by crew or resource, set this option to By Task. With this option, each task can have a unique conversion and conversion overhead rate.

For example, if you select By Work Center, then you can access the conversion code fields on the work center pages but not on the task pages.

Online BOM Verification

You can choose how to handle Online BOM Verification for production BOMs or, if you are using PeopleSoft Engineering, for engineering BOMs:

Always Verify Online Runs the process online during bill of material maintenance.

Never Verify Online Runs the verification as a deferred process.

Note. When BOMs are complex and deep, we recommend that you select Never Verify Online to improve BOM maintenance performance and run the BOM verification process from the BOM Verification page.

Default Calendar Codes

To indicate a default production calendar for your business unit, select Production Calendar Code. You create calendar codes and their associated calendars using the Calendar Code Definition page. The first calendar code and associated calendar you create for the business unit is the default for this field, and is considered the primary production calendar for the business unit. If a calendar code isn't associated with a work center, or if the calendar code associated with the work center isn't effective yet or is obsolete, the system uses the calendar defined here to schedule production.

The Run-time Calendar Code is a display-only field, indicating which calendar code is actually being used as the default production calendar for the business unit.

When you associate a different calendar code than the current run-time calendar code, the system optionally sends a workflow notification to selected roles that you define. This workflow notifies the user (such as a production control manager) that the calendar originally used for scheduling isn't in synch with the calendar code that you just specified for the business unit.

If you don't define a calendar code and an associated calendar for the business unit, or if your production calendar associated with your business unit runs out, PeopleSoft Manufacturing assumes you are working a five-day work week. A five-day work week is defined as Monday through Friday with one shift. You set it up using the Work Week Definition page.

BOM Usage Defaulting

BOM Usage Defaulting enables you, at the business unit level, to indicate whether you'll maintain BOMs:

- In PeopleSoft Manufacturing and PeopleSoft Engineering.
- By revisions.
- By effectivity dates and whether revisions can be automatically generated for revision controlled items.

Revision Control	Select to generate BOMs by revisions.
Auto Revision	Select to automatically generate revisions.
By Effectivity Date	Select to maintain BOMs by effectivity date.
By Revision	If you are maintaining BOMs by Effectivity Date, you can optionally specify an effective revision which equates to an effectivity date.

While the value you define here (at the business unit level) is the default at the item setup level, you can overwrite this at the item level.

If you want to automatically create revisions to items, use the mass maintenance functionality in PeopleSoft Manufacturing or PeopleSoft Engineering. You can use either of these:

- BOM Mass Maintenance by Mass Maintenance Code (MMC)
- BOM Mass Maintenance by Engineering Change Order (ECO)

The mass maintenance process creates revisions for those items that have both revision control and automatic revision selected. In other cases, the process functions as a regular mass maintenance process without creating automatic revisions.

Use the Auto Revision Scheme page in this component to define the scheme the system will use to generate automatic revisions.

BOM Maintenance Settings

Allow Blank Component Revision and Default Component Revision

Select these two check boxes to define component revision default settings that impact the BOM Maintenance pages. These two check boxes only apply to revision-controlled items. Furthermore, they operate independently of each other and therefore there are four possible combinations of settings.

Default Teardown BOM Component

Select to indicate business unit settings for teardown components. You can only select this check box for teardown production orders. If you select this check box, the system indicates that the components are Teardown Outputs on the BOM Maintenance Component Details page when you add or change components on a BOM.

Note. This check box only affects teardown components with a source code of Make or Buy.

If teardown components are selected on a BOM, the system copies the components to the output list when you create a teardown production order, based on the BOM code.

Components Align with Revision

Select to indicate that any component existing on a BOM for a revision-controlled assembly must be associated with one of the assembly revisions. This is the default setting and most common for revision-controlled environments. However, if your environment requires a change to the BOM structure without rolling the revision of the parent assembly, then clear this option to enable you to do so. This can be required in outsourcing scenarios where you are the contract manufacturer and are required to adhere to customer specified revision in manufacturing.

When this option is cleared, you can introduce a new component against the current revision of the assembly as of today versus the start date of the current revision for the assembly. In this scenario, the components required to build the assembly for the revision-controlled item will be based on the revision specified, including any additional component changes up to the date specified when creating the component list.

Note. In addition to clearing this option, you must also set the assembly item's business unit item attributes manufacturing setting for BOM Usage to be By Effective Date so that new components for that assembly can be created for dates not associated with the assembly revision.

See Also

[Chapter 8, “Maintaining Bills of Material,” page 147](#)

PeopleSoft Engineering 8.8 PeopleBook, “Maintaining Engineering Bills of Material”

[Chapter 4, “Establishing Production Calendars,” Defining the Work Week, page 50](#)

[Chapter 4, “Establishing Production Calendars,” Defining Your Default Production Week Calendar, page 51](#)

[Chapter 2, “Understanding PeopleSoft Manufacturing,” Additional Manufacturing Functionality, page 26](#)

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining Manufacturing Information for an Item

Setting Up Manufacturing Business Unit Production Options

Access MFG BU Prdn Options page.

MFG Business Unit Options **MFG BU Prdn Options** **Auto Revision Scheme** **BOM Message Default**

Unit: US008

Calc Per Order for Prdn Sched ☒ Calc Per Order for Prdn Sched ☐ Don't Calc Per Ord on Prdn Sch	Auto Release Options for PID ☒ Prompt for Auto Release ☐ Auto Release ☐ No Auto Release
Freeze Planning Defaults ☐ Rework ☐ Teardown	PID Completion Option ☒ On-line ☐ Deferred
Auto Freeze Planning Option ☒ Auto Freeze Planning ☐ No Auto Freeze Planning	BOM Explosion By Date ☐ By Start Date ☒ By End Date

MFG BU Prdn Options page

Calc Per Order for Prdn Sched

Use the Calc Per Order for Prdn Sched (calculate per order for production schedule) group box to indicate if you want the system to update the pending issue quantity for any component on a production schedule's component list whose quantity is per order.

Select Calc Per Order for Prdn Sched if you want the pending issue quantity for a component set to the per order amount each time you record a completion on a production schedule. This means that the per order quantity will be consumed from the WIP location with each backflush, unless you use the Edit/Issue Components page to zero out the pending issue quantity.

Select Don't Calc Per Ord on Prdn Sched (don't calculate per order on production schedule) if you don't want the pending issue quantity automatically filled. Selecting this option means you must use the Edit/Issue Components page whenever the components order quantity should be consumed from the WIP location following a backflush.

Auto Release Options for PID

Use the Auto Release Option for PID to indicate how you want to handle the releasing of production IDs on the shop floor for your manufacturing business unit. You can choose from any of these options:

Prompt for Auto Release	The system prompts you to release the selected Entered or Firmed production ID when recording completions, scrap, or editing components. Click Yes to automatically release the production ID - streamlining the production process. Click No to select an alternate production ID if one was selected in error.
Auto Release	The system automatically releases selected production IDs with a status of <i>Entered</i> or <i>Firmed</i> from the Record Completions/Scrap and Edit Issue Components pages. You won't be prompted to release the production ID.
No Auto Release	The system won't allow you to automatically release production. You must use the Production ID Status Change or Production Status Change page to release production for your manufacturing business unit.

Freeze Planning Default

Use the Freeze Planning Default group box to indicate if new rework or teardown orders for this business unit should be frozen. The Planning engine won't reschedule frozen orders to repair capacity violations.

Select Rework if you want to freeze all new rework orders.

Select Teardown if you want to freeze all new teardown orders.

Note. The system creates new production orders in the unfrozen status.

Use Planning Attributes to override this default check box. You can also manually unfreeze an order in the Planning engine and rerun a solver to reschedule the order.

See [Chapter 18, "Maintaining Production Orders and Production Schedules," Frozen Production, page 385](#).

PID Completion Option

Use the PID Completion Option to indicate when you want to run the completions process for your business unit. You can select one of these options:

On-Line	This option indicates that you are going to process completions online. The update process runs immediately and calculates associated production costs - earned labor and machine hours, conversion codes and overhead conversion costs. It also consumes components and routes completed material to storage locations or other production.

Deferred

This option indicates that you are running the completions process at a later time. All associated production costs are calculated when you run the Completions Update Process background process.

BOM Explosion By Date**By Start Date or By End Date**

Select an option to indicate whether the BOM explosion for creating a new production component list should be based on the production start date or end date.

Auto Freeze Planning Option

You can set up an Auto Freeze Planning Option so that the system automatically freezes operations for production based on where it is in the manufacturing process. This provides the Planning engine the option to reschedule production around certain operations. You can also freeze or unfreeze operations manually while maintaining the operation list.

Select Auto Freeze Planning to indicate that you want the system to freeze production operations when you've recorded any of these transactions for that operation:

- Actual hours
- Operation completions
- Operation scrap
- Setup complete
- By-product or co-product completions

The system won't automatically freeze an operation if you've recorded material consumption for that order (issue, kit, or edit components) *unless* you've also recorded completions for that operation. Select No Auto Freeze Planning if you don't want the system to automatically freeze production operations.

See Also

[Chapter 19, "Maintaining Component Lists," page 431](#)

[Chapter 21, "Releasing Production and Changing Production Statuses," page 471](#)

[Chapter 20, "Maintaining Operation Lists," page 451](#)

[Chapter 23, "Completing Operations and Recording Scrap," page 521](#)

Defining Revision Schemes

Access the Auto Revision Scheme page.

MFG Business Unit Options
MFG BU Prdn Options
Auto Revision Scheme
BOM Message Default

Unit: US008

Revision Scheme		Customize	Find	View All	First	1-2 of 2	Last
*Sequence Number	*Revision						
1	A				+		-
2	B				+		-

Manufacturing Options - Auto Revision Scheme page

Note. This page is primarily intended to be used when you're implementing the system.

Revision Scheme

You generate automatic revisions by using the mass maintenance functionality. Prior to creating an automatic revision, however, the system needs to know what scheme or sequence of revisions to use to create the next revision. With this Revision Scheme page, you create such a revision scheme by entering Sequence Numbers as well as alphanumeric Revisions. The system uses this scheme to automatically increment sequenced assembly revisions. Each time new revisions are automatically generated, they follow the order defined in this predetermined list of sequenced revision names. For example, if the current revision for an item is C, then the next automatic revision will be D. If the current revision doesn't exist in the scheme, then the system creates the revision with the lowest non-existing sequence number. For example, if an item currently has revisions A, B, and X, then the next revision created for the item will be C.

You can insert interim revisions into the sequence scheme if needed. For example, if the sequence is 100, 110, 120, you can add a 115 between the 110 and 120 revisions. Changing the revision scheme won't update the sequence of revisions already in use on an item.

Note. You can't enter duplicate Sequence Numbers or Revisions. If you try to change or delete revision names that are already in use on a BOM, you'll receive a warning message.

Setting Up BOM Messages

Access the BOM Message Default page.

MFG Business Unit Options	MFG BU Prdn Options	Auto Revision Scheme	BOM Message Default
Unit: US008			
BOM Qty: 1			
Obs Date: 07/01/2000 31			
Comp Qty: 1.0000		Per: Asy	
Yield: 100.0000			
☐ Subcontract Supply ☐ Non-Owned Item ☒ Teardown			

Manufacturing Options - BOM Message Default page

If you are using effectivity dates, enter the Obs Date (obsolete date) for the components of the incoming BOM message.

Indicate the Comp Qty (component quantity) to assign to incoming BOM message components.

In the quantity Per field, enter whether you want the component quantity for incoming BOM messages to apply Per Asy (assembly) or Per Order. If you set the quantity Per to Asy, and when the system determines component requirements in PeopleSoft Supply Planning, the system divides the quantity Per by the BOM Qty (quantity) and then multiplies that result by the demand or order quantity. If you set quantity Per to Order, the system uses the quantity regardless of the demand quantity or order size.

Component Yield is the expected percentage of usable components within a batch of components issued to production. If you know that components may be damaged during the issuing or assembly process, you can account for that loss here. Indicate the Yield to be assigned to incoming BOM messages.

Select Subcontract Supply if you are subcontracting all or part of your manufacturing process and you want to assign this status to incoming BOM messages.

Select Non-Owned Item for incoming BOM messages if you don't own the component and want to indicate that the component is consigned to you or is supplied by your customer.

You can indicate if incoming BOM message components should be a potential output from a teardown order. When you select Teardown, the system designates the component as a teardown output.

See Also

[Chapter 8, "Maintaining Bills of Material," page 147](#)

[Chapter 5, "Integrating with Third-Party Systems," page 57](#)

Setting Up Your Business Unit Structure to Integrate with Agile Product Collaboration™ 8.0 or 8.5

You will need to set up certain business unit related attributes in order to integrate PeopleSoft Manufacturing with Agile Product Collaboration™ 8.0 or 8.5.

See Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” page 65.

CHAPTER 4

Establishing Production Calendars

This chapter provides an overview of production calendars and discusses how to:

- (Optional) Use production calendar codes.
- Define shift codes.
- Establish business unit calendars.
- Create run time calendars.

Understanding Production Calendars

Before starting production, you must define, at a minimum, the hours of operation for a five-day work week that can be used when production runs for one shift, Monday through Friday. If your enterprise works multiple shifts, or if you want the planning and scheduling functions to consider holidays, weekends, or planned downtime, you must create a production calendar. If all work centers and resources are available during the same working hours, you must define only one calendar.

However, if different work centers have different hours of operation, you can optionally define alternate calendars to accommodate these exceptions. Create production and alternate calendars by first defining a calendar code and then defining the hours of operation for that calendar code. Tie these calendar codes to a business unit, work centers, and resources to define when your enterprise is available for production. You can assign one calendar code to multiple resources and work centers, for example, when two work centers share the same hours of operation.

Note. Before establishing production calendars, define your PeopleSoft Inventory and Manufacturing business units.

See Also

Chapter 3, “Defining Your Business Unit Structure,” page 33

Using Production Calendar Codes

With PeopleSoft Manufacturing, you can create standard and alternate production calendars for your enterprise to cover an entire year or a partial year. You create one or more calendar codes and enter calendar information for each code. You can assign alternate calendar codes to work centers whose hours of operation differ from that of the business unit. In addition, if you are using PeopleSoft Supply Planning, you can assign these calendar codes to resources.

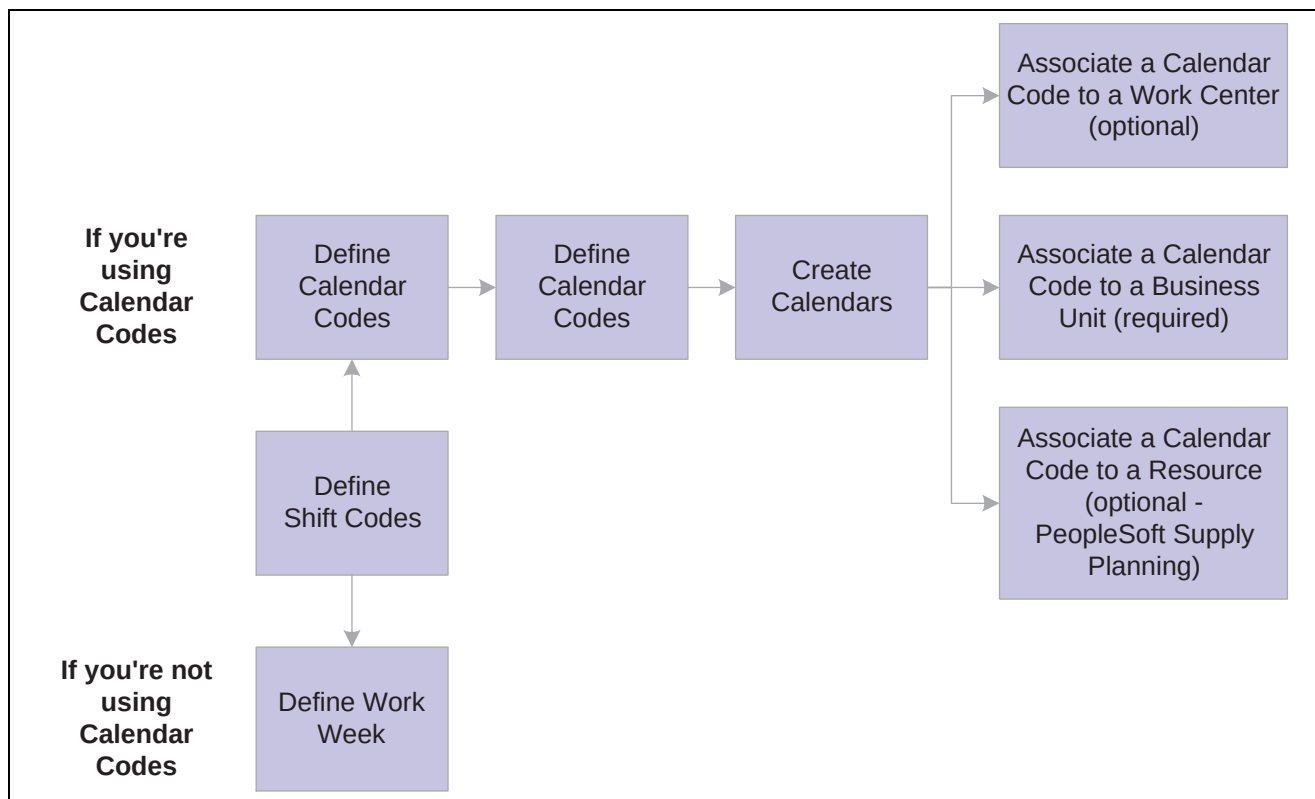
You can assign a single calendar code and its associated calendar to multiple work centers if they have similar working and nonworking days.

This section discusses:

- The process to define production calendar codes.
- The scheduling hierarchy to determine available production time.
- How to assign calendar codes to business units, work centers, and resources.

Process to Define Production Calendar Codes

This diagram illustrates the process to define production calendar codes for work centers or resources:



Defining calendars for business units, work centers, and resources

Scheduling Hierarchy to Determine Available Production Time

The scheduling and planning functions in PeopleSoft Manufacturing use a hierarchy to determine available production times and days:

1. If a calendar code has been defined for the routing operation's work center, the system uses the calendar code assigned to the work center.
2. If a calendar code hasn't been associated to the work center, the system uses the production calendar code defined for the business unit.
3. If a production calendar isn't available, the planning and scheduling functions base start and due dates and times on a five-day work week.

The system defines a five-day work week as Monday through Friday with one shift. The specific hours of operation for the shift are user defined. The defined shift must start and end on the same day.

If you are using PeopleSoft Supply Planning, the system creates a plan based on the calendars assigned to the particular resource or work center. If a calendar isn't associated with a resource or work center, the system uses the business unit's default production calendar to create a plan.

Assigning Calendar Codes to Business Units, Work Centers, and Resources

Once you create calendar codes and the associated run time calendar, you can associate them to your business unit, work centers, and resources. Once you attach the calendar code, its associated run time calendar code appears, indicating that the calendar is created and recognized in the planning and scheduling process.

Business Units

Assign the calendar code to the business unit using the Manufacturing Options page. If a calendar code is not associated with a work center, PeopleSoft Manufacturing uses the calendar code defined on the Manufacturing Options page to schedule production for all work centers that do not have a work center calendar defined within the business unit.

Important! Designate only one calendar code as the business unit's production calendar. When you add the first calendar code for a business unit, PeopleSoft Manufacturing automatically defines it as the *default* production calendar.

Work Centers

Associate the appropriate alternate calendar code to the work center using the Work Center Attributes 1 page. If you associate a calendar code to a work center, PeopleSoft Manufacturing uses the calendar associated with the code to schedule production for this particular work center. PeopleSoft Supply Planning uses these calendars when you are doing aggregate capacity planning. If a calendar code isn't associated with a work center, PeopleSoft Manufacturing schedules production for the work center based on the default calendar associated with the business unit.

Production Resources

If you are using PeopleSoft Supply Planning, associate the appropriate calendar code to a resource—tool, machine, or crew—using the appropriate Planning Options page. If you associate an alternate calendar code to a resource, PeopleSoft Supply Planning uses this calendar to schedule production while optimizing the plan. If a calendar code isn't associated with the resource, PeopleSoft Supply Planning schedules production for the resource based on the default calendar associated with the business unit.

See Also

[Chapter 20, “Maintaining Operation Lists,” page 451](#)

[Chapter 12, “Defining Work Centers,” page 251](#)

[Chapter 11, “Defining Resources,” page 243](#)

Defining Shift Codes

To define shift codes, use the Shift Code Definition component (MG_SHIFTS).

This section discusses how to define shift codes associated with production calendars. When setting up production and alternate calendars or your default production calendar week, you can specify which shifts are in operation for a given day. To set up the five-day work week or any calendar, first define shift codes.

Page Used to Define Shift Codes

Page Name	Object Name	Navigation	Usage
Shift Code Definition	MG_SHIFTS	Set Up Financials/Supply Chain, Business Unit Related, Define Production Calendars, Shift Code Definition	Define shift codes.

Defining Your Production Shift Codes

Access the Shift Code Definition page.

Shift Code

While you can specify only three shifts per calendar day or one for your work week definition, you can maintain an unlimited number of shift codes. Designate a start time and end time, depending on the calendar day.

For example, you can define three shift codes, spanning all 24 hours in a day, and associate them with Monday through Friday. You can then define a fourth shift code with a start and end time of 8 a.m. and 12 p.m. respectively and associate that shift code only with Saturday. When associating a shift code to the five-day work week, the hours of operation defined for the shift code are applied to Monday through Friday.

Production date and shift information is defined as the working day and shift where component and production scheduling can be accomplished. Although you define your shift codes here, use these codes, along with your production dates, to define your default production calendar week and production and alternate calendars. For example, on the production calendar for the month of March, specify that you are working three shifts on 3/27/03. You've just defined a production date of 3/27/03 with three production shifts: 1, 2, and 3. If you are using the system production work week, then the system automatically defines the production dates as the calendar dates associated with Mondays through Fridays. Because you can associate only one shift for all five days, the production shift is always defined as 1. For example, the last Friday for the month of March is 3/26/03. The production date is 3/26/03 and the production shift is 1.

Actual date and time is defined as the actual physical date and time that the production is scheduled to begin or end based on the standard calendar. In most cases, your production dates and actual dates are the same. If you have a production shift that spans two days, your actual date for production may be different than the production date. The system determines your actual date by the actual time that your production is scheduled to start or end within the production shift.

If you are defining a shift that spans multiple dates, select a production date time. Values are:

- *Start Time*: The manufacturing production date to be the date associated with the start of the shift.
- *End Time*: The date associated with the end of the shift.

If the shift doesn't span multiple dates, the production date time is automatically set to *Start Time*, because both the start and end time of the shift is associated with the manufacturing production date. In this case, this field is unavailable.

The system determines the production date and shift information based on the actual start time or end time of the shift. These examples illustrate how the system determines the manufacturing production date based on whether you want the start time or end time of the shift to define the manufacturing production date.

Example 1: Production Date Time Set to Start Time

A company runs three shifts where the third shift starts at 8 p.m. and ends at 2 a.m. This shift is defined with the start time associated with the production date. A production schedule can now be defined for a production due date and due shift. In our example, production is due to complete on 3/26/03 at 1:30 a.m. Because the shift in which production takes place actually begins on 3/25/03 at 8:00 p.m., the production date and shift is recorded as 3/25/03, shift 3. The actual date and time still appears as 3/26/03 at 1:30 a.m.

Example 2: Production Date Time Set to End Time

A company runs three shifts where the first shift starts at 10 p.m. and ends at 6 a.m. This shift is defined with the end time associated with the production date. A production schedule can now be defined for a production due date and due shift. In our example, production is due to complete on 3/27/03 at 5:30 a.m. Because the shift ends at 6:00 a.m. and the Prdn Due Date (production due date) field is set to the shift's end time, the production due date and shift is 3/27/03, shift 1. The actual date and time still appears as 3/27/03 at 5:30 a.m.

Note. Visibility of the production date and shift, as well as the actual date and time for production IDs and production schedules is available throughout PeopleSoft Manufacturing. This applies for both actual start and due production information.

Establishing Business Unit Calendars

To define a work week, default production week, or a manufacturing calendar, use the Work Week Definition (MG_WORK_WK_DEFN), Default Production Week (MG_CAL_DEF_WEEK), and Calendar Code Definition (MG_CALENDAR) components.

After you define the shifts in operation for a given day, define your business unit calendars. The five-day work week is also used if your production calendar code isn't yet effective or is obsolete. These calendars define which days your manufacturing business unit is available and the hours of operation for each day. Your start and due dates for production and for each operation are determined based on the business unit calendar that you define.

This section discusses how to:

- Define the work week for your business unit.
- Define a default production week calendar.
- (Optional) Define production calendar codes.

Pages Used to Establish Business Unit Calendars

Page Name	Object Name	Navigation	Usage
Work Week Definition	MG_WORK_WK_DEFN	Set Up Financials/Supply Chain, Business Unit Related, Define Production Calendars, Work Week Definition	Define a five-day, one-shift work week.
Default Production Week	MG_CAL_DEF_WEEK	Set Up Financials/Supply Chain, Business Unit Related, Define Production Calendars, Default Prdn Calendar Week	Use to facilitate data entry if you are defining a calendar for a calendar code.
Calendar Code Definition	MG_CALENDAR	Set Up Financials/Supply Chain, Business Unit Related, Define Production Calendars, Calendar Code Definition	Define production calendar codes.

Defining the Work Week

Access the Work Week Definition page.

Note. If you don't define at least one calendar code with its associated calendar, or if your production calendar associated with your business unit becomes obsolete, the planning and scheduling functions assume that you are working a five-day work week. The system defines a five-day work week as Monday through Friday, with one shift. Define the specific hours of operation for the shift; the shift must start and end on the same day.

Shift Code

Select only a single shift code. However, if you work more than one shift, your shift code should include all hours of operation for all shifts, as long as the start and end times don't span multiple days. Alternatively,

if more than one shift is applicable, or you have a shift that spans multiple days, you may want to define a production calendar.

When using a five-day work week for scheduling, define the hours of operation for the five days. Do this by selecting a shift code to associate with the work week.

Start of Shift and End of Shift

These fields appear by default from the Shift Codes page.

See Also

[Chapter 4, “Establishing Production Calendars,” Defining Shift Codes, page 48](#)

Defining Your Default Production Week Calendar

Access the Default Production Week page.

Default Production Week

Unit: US008

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Shift A:		1 🔍	1 🔍	1 🔍	1 🔍	1 🔍	
Shift B:		2 🔍	2 🔍	2 🔍	2 🔍	2 🔍	
Shift C:		🔍	🔍	🔍	🔍	🔍	
Day Off	☒	☐	☐	☐	☐	☐	☒

Default Production Week page

When defining a calendar, use this default week to fill each week of a month. This default week should represent a typical production week, including or excluding weekends. Because the system automatically creates the production month using this default week, this page is the preparatory step to defining production months within calendar codes. You can then make changes for individual days within the month on each month's calendar.

For each day in the week, you can assign up to three shifts (Shifts A, B, and C) from among the shifts defined using the Shift Code Definition page. You cannot enter duplicate shifts for the same day, and the shifts that you select for any given day cannot overlap. The shift times must be chronological beginning with the earliest shift listed first and the latest shift listed last. The system does allow shift schedule gaps as long as the shift times remain chronological. The shift times must also be chronological across all days of the week.

If you select the Day Off check box, you are defining the day as a day off; therefore, you cannot define any shift for that day on this page.

However, you can still change each shift or days off for any day of the week when actually defining a monthly calendar.

Understanding Production Calendar Codes

Once you define your shift codes and default production calendar week for your business units, you can define one or more calendar codes with their associated calendar for each business unit. You can then use these calendar codes within each business unit to set up your calendars for business units, work centers, production resources, and enterprise resources.

You can create calendar codes for an entire year, a partial year, or a few months within the year. You can define a primary production calendar code for a business unit, then create alternate calendar codes to use as exception calendars for work centers and resources.

Keep these in mind when you create calendar codes:

- The first calendar code and associated calendar is automatically set to the business unit's default calendar.

To use a different calendar as the production calendar, define that calendar code and use the Manufacturing Options page to change the default production calendar.

- You can define only months within alternate calendar codes that are found within the range of the production calendar code.

For example, for 2003, the primary production calendar code M2 has the months of January and July defined. The alternate calendar code may not have August defined, but February or March may be defined, because they fall within the range of the production calendar code (January through July).

- Alternate calendar codes function as exception calendar codes to the default production calendar code.

For example, suppose that the production calendar code is defined for the months of January through December and the alternate calendar code is defined for the months of May and July, the system uses the alternate calendar code defined for May and July. The system uses the default dates defined for the production calendar code for all other months.

- You cannot delete a month from the production calendar code if it uses the alternate calendar code.
- If only one month is left on the production calendar code and you delete it, the system deletes the production calendar code from the Manufacturing Options page.

PeopleSoft Manufacturing then uses the work week definition to schedule production.

- If an alternate calendar code is defined for a work center or resource, you cannot delete every month defined for the calendar code.

Once you have added at least one calendar code, you must assign the calendar code to the appropriate business unit. If alternate calendar codes are defined, you can optionally assign those codes to work centers.

If you're using PeopleSoft Supply Planning, you can optionally assign alternate calendar codes to resources.

Important! Before you can assign calendar codes, run the Create Calendars process (MGS3000) to create a version of the calendar—the run time calendar—which is used in the planning and scheduling functions.

Run the Create Calendars process to create a new version of the calendar based on the latest calendar definition if you changed anything relating to the calendar such as:

- Changing a shift code's start or end times.
- Adding another month or year.
- Deleting a month or year.

- Changing a non-manufacturing day to a manufacturing day.

If you have enabled PeopleSoft Workflow, any time that you make a change to the calendar code, the system optionally sends a workflow notification to selected roles that you defined. This Production Calendar Change workflow notifies the role, such as a production control manager, that the calendars originally used for scheduling are not in synch with the changes, additions, or deletions that you made to the calendar code, and that you must create a new run-time version of the calendar.

See Also

Chapter 4, “Establishing Production Calendars,” Creating Run Time Calendars, page 54

Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649

Defining Calendar Codes

Access the Calendar Code Definition page.

Calendar Code Definition						
Calendar Code						
Unit: US008		Calendar Code: DEFAULT		Production Calendar ☒		
*Mo: 01		January		2004		
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
				☐ 2	☐ 2	☒
4	5	6	7	8	9	10
☒	☐ 2	☐ 2	☐ 2	☐ 2	☐ 2	☒
11	12	13	14	15	16	17
☒	☐ 2	☐ 2	☐ 2	☐ 2	☐ 2	☒
18	19	20	21	22	23	24
☒	☐ 2	☐ 2	☐ 2	☐ 2	☐ 2	☒
25	26	27	28	29	30	31
☒	☐ 2	☐ 2	☐ 2	☐ 2	☐ 2	☒

Calendar Code Definition page

Production Calendar

If the calendar code is the default calendar code for the business unit, as defined on the Manufacturing Options page, this check box is selected.

Mo: (month)

Create a calendar code with one month, a partial set of months, or 12 months of the year. If you want to create a new monthly calendar, insert a new row, select the month that you want to maintain, and press TAB to move to the next field. The system automatically fills the month with the values previously

entered for the default production week. You can then change individual days for the month without affecting the default weekly production calendar.

If you have already created the month and you want to change the calendar for an existing month, the Mo. field is unavailable for selection. Use the scroll bar to view the calendar for all existing months for the year.

For each day in the week, you can assign up to three shifts from among the shifts defined on the Shift Code Definition page. You cannot enter duplicate shifts for the same day, and the shifts that you select for any given day cannot overlap. The shift times must also be chronological, beginning with the earliest shift listed first and the latest shift listed last. The system does allow shift schedule gaps as long as the shift times remain chronological across all days of the production calendar. Additionally, a shift can begin on one day and end on the next.



Select the Day Off check box in the day's lower left corner, if you want the day to be a non-manufacturing day.

Creating Run Time Calendars

Once you have defined your codes for each calendar, run the process to create a version of the calendars to be used for the planning and scheduling functions.

Run the process any time that you add or change a calendar code. If you have changed anything about a calendar, for example, changed a shift code's start or end times, added or deleted a month or year, changed a non-manufacturing day to a manufacturing day, or vice versa, run the Create Calendar process to create a new version of the calendar, based on the latest calendar definitions.

This section discusses how to create and maintain calendars and calendar codes.

See Also

Chapter 4, "Establishing Production Calendars," Assigning Calendar Codes to Business Units, Work Centers, and Resources, page 47

Page Used to Create Run Time Calendars

Page Name	Object Name	Navigation	Usage
Create Calendars	RUN_MGS3000	Set Up Financials/Supply Chain, Business Unit Related, Define Production Calendars, Create Calendars	Update the system with new calendar codes or calendar information.

Running the Run Time Calendars SQR Process

Access the Create Calendars page.

Report Request Parameters

Create Manufacturing Calendar

Select to create a new version of the default production calendar.

Create Alternate Calendar

Select to create a new version of one or more alternate calendars.

If you are creating the manufacturing calendar, the Create Alternate Calendar check box is automatically selected.

All and Range

Specify the alternate calendars that you want to create.

Run

Click to run this request. PeopleSoft Process Scheduler runs the Create Calendars process at user-defined intervals.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

CHAPTER 5

Integrating with Third-Party Systems

This chapter gives an overview of integrating with third-party systems and discusses how to manage your information in greater detail by integrating PeopleSoft Manufacturing with these third-party systems:

- Electronic data collection.
- Item content provider.
- Manufacturing execution system.
- Product data management system.
- Agile Product Collaboration™ 8.0 or 8.5.

See Also

Chapter 1, “Getting Started with PeopleSoft Manufacturing,” PeopleSoft Manufacturing Integrations, page 6

Integrating with an Electronic Data Collection System

Today, many manufacturers are minimizing manual data entry on the shop floor. Enhancing the capability to employ data collection devices provides improvements in three very important areas:

Error reduction	You can scan the control data (production, operation, and work center) rather than manually enter it, reducing the probability of errors.
Accuracy	Data collected during the course of the production activity reflects greater accuracy.
Simplicity	Depending upon the data collection front-end solution, you can combine several transactions together.

PeopleSoft Manufacturing and PeopleSoft Flow Production enable you to use a bar code scanner, wedge connected to a PC, or radio frequency device to scan data. You can use electronic data collection with these transactions:

- Actual Hours
- Completions
- Component Issue/Return
- Kanban Completions
- Kanban Receiving

- Kanban Transfers
- Kit Issues/Returns
- Manual Replenishment Request
- Multiple Output Completions
- Production Picking

Bar coded labels are available for completed items, Kanban Cards, and Pull Tickets. You can also print bar code-enabled reports.

All bar coded transactions are inserted into a central Transaction Log using PeopleSoft Application Messaging, where a process executes to pick up specific transaction rows for validation. If no errors are found, the system applies the transactions through PeopleSoft Manufacturing and PeopleSoft Flow Production. If errors are found, you can review the transactions and fix the errors on the Transaction Maintenance page.

See Also

Chapter 1, “Getting Started with PeopleSoft Manufacturing,” page 3

Chapter 1, “Getting Started with PeopleSoft Manufacturing,” PeopleSoft Manufacturing Integrations, page 6

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Integrating to Electronic Data Collection Systems”

PeopleSoft Flow Production 8.8 PeopleBook, “Using Replenishment Sources”

Chapter 22, “Issuing Material to Production,” Processing Picking Plans Using Electronic Data Collection, page 514

Chapter 22, “Issuing Material to Production,” Processing Kit Issues and Returns Using Electronic Data Collection, page 517

Chapter 22, “Issuing Material to Production,” Issuing Material Using Electronic Data Collection, page 513

PeopleSoft Flow Production 8.8 PeopleBook, “Maintaining Kanban Cards and Replenishment Requests,” Creating Manual Replenishment Requests

Integrating with an Item Content Provider

The proliferation of Web-based catalogs has provided manufacturers with an easy and effective tool to locate components with the desired specifications at the lowest cost. The traditional catalog function now comes in a variety of forms to improve business to business communication between systems. Examples of the types of systems PeopleSoft defines as ‘Item Content Providers’ include Component Supplier Management (CSM) systems, market site aggregators, independent trading exchanges, and traditional catalog providers with new web interfaces. These systems benefit the design and purchasing of new products by accelerating item location, maximizing design reuse, and reducing acquisition costs.

Item Content Providers provide tools to classify and query item lists. This benefits engineering designs by enabling parametric search capability, maximizing design reuse, preferred parts selection, and efficient parts retrieval. You can use Item Content Providers to help reduce the number of redundant items in an organization.

On the procurement side of your organization, you can use an Item Content Provider to classify parts and vendors, and set up business rules for supplier consolidation, and supplier performance management. It also helps with cost reduction by getting the correct and lowest cost components up front.

PeopleSoft provides several enterprise integration points (EIP) to these systems to maximize ease of importing item data into your PeopleSoft database. Using Application Messaging technology, you can keep this information up to date within your PeopleSoft system by subscribing to XML messages from an Item Content Provider system to the PeopleSoft EIPs:

- Item Definition (SetID)
- Item Business Unit attributes
- Item Revisions
- Vendor/Item attributes

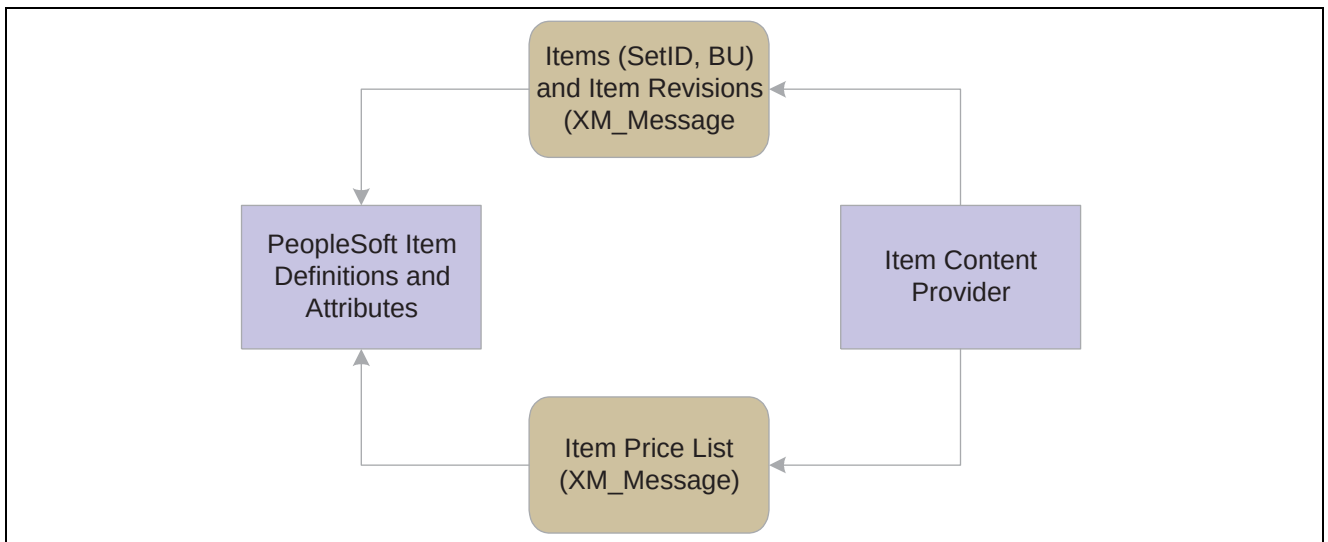
Note. For Item Content Providers, PeopleSoft supports inbound messages only.

Understanding Item Content Provider Transactions

Depending on the Item Content Provider involved, it may include publishing items, revisions, and item pricelist messages. These messages must be formatted into the PeopleSoft XML structure prior to being posted to PeopleSoft.

Note. This translation is third-party specific and isn't performed using the PeopleSoft system.

Once XML messages are posted to PeopleSoft, the PeopleSoft subscription process reformats the XML message data and writes the data into PeopleSoft staging tables. The system then initiates an Application Engine process to validate the data. If no errors are found, the process then updates the PeopleSoft item definition tables. If errors are found, you can review the message log and correct errors using the standard Data Definition Maintenance pages.



Item Content Provider Process

Note. You can't use Item Content Provider transactions to update transaction related data such as item quantity balances in the PeopleSoft Inventory tables.

Using the Item Master Transaction

The Item Content Provider uses the Item Master EIP to accept detailed updates and new items master information as well as Item business unit specific attributes including Revision data. The Item data includes Master Item, Item Business Unit Attributes, Purchasing Attributes, Item Unit of Measure and Item Revision information.

See *PeopleSoft Engineering 8.8 PeopleBook*, "PeopleSoft Engineering Overview".

Using the Item Pricelist Transaction

Item Pricelist messages update your system with vendor's item catalogs. This includes detailed item information such as item dimensions, lot and serial control numbers, item groups and families, categories, and statuses. For each item, the system can also receive purchasing data including inspection information, pricing, packing dimensions, and vendor information like vendor catalog number and standard pricing.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, "Managing PeopleSoft Supply Chain Management Integration Points"

Integrating with a Product Data Management System

Product Data Management (PDM) systems effectively—and quickly—track and implement new product introductions and product changes. These systems provide engineering-centric software that often pulls together CAD and product documentation, BOM and item information, ECOs, and workflow.

There is a framework in place to enable on-going, one-way transfer of items, item revisions, and BOMs from your third-party PDM system to PeopleSoft. Using PeopleSoft Application Messaging technology, your third-party system is able to publish messages to PeopleSoft.

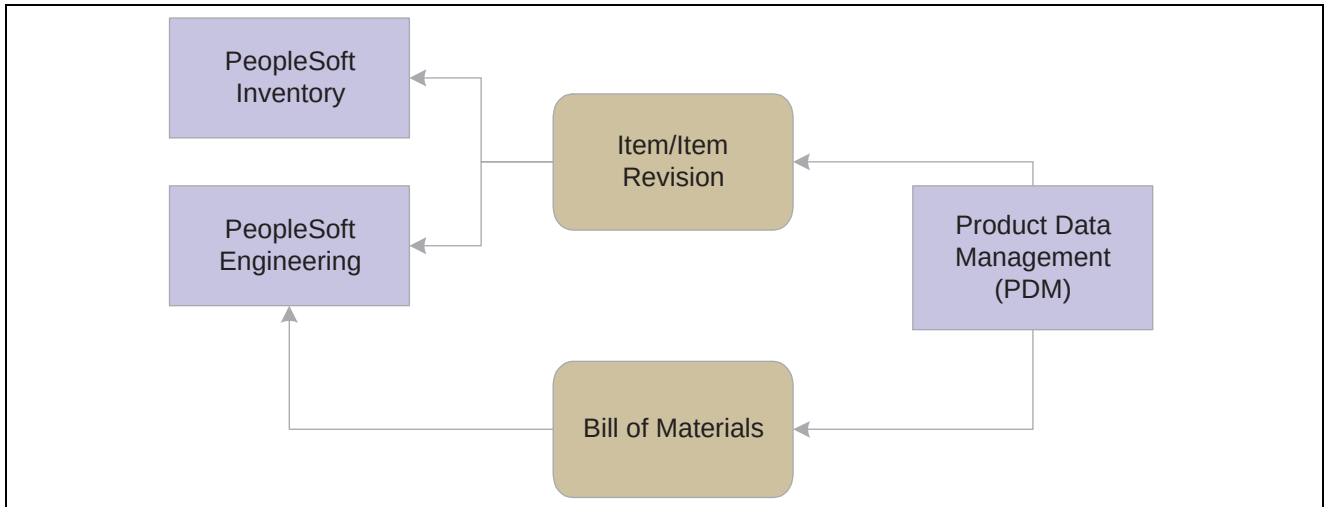
See Also

Chapter 1, "Getting Started with PeopleSoft Manufacturing," PeopleSoft Manufacturing Integrations, page 6

Understanding Product Data Management

Product Data Management transactions work very much like Item Content Provider transactions. The Product Data Management system publishes item, item revision and bill of material messages. The PeopleSoft subscription process reformats the message data and writes the data into a staging table. The system then initiates an Application Engine process to validate the data. If no errors are found, the process then updates the PeopleSoft Inventory item and BOM tables. If errors are found, you can review the message log and correct errors using the standard Data Definition Maintenance pages.

The PDM Provider publishes new BOMs, updates to existing BOMs, new items, and item revisions.



Product Data Management Process

Using the Bill of Material Transaction

If you are integrating to a third-party Product Data Management (PDM) system, you can subscribe to BOM messages from that system. You typically use PDM systems to manage design aspects of BOMs and BOM changes. You can use them to create new BOMs and then update PeopleSoft Engineering or PeopleSoft Manufacturing. For existing BOMs, you can change components, reference designators, output lists, and substitute items in the PDM and send messages back to PeopleSoft. You maintain quantity information in the PeopleSoft applications rather than in the PDM.

See *PeopleSoft Engineering 8.8 PeopleBook*, “PeopleSoft Engineering Overview”.

Using the Item Master Transaction

The Item Content Provider uses the Item Master EIP to accept detailed updates and new items. The Item data includes Master Item, Item Business Unit Attributes, Purchasing Attributes, Item Unit of Measure and Item Revision information. This is an inbound, asynchronous message.

Note. When publishing new items or item revisions in combination with MBOM or EBOM additions or changes, you must publish Item additions prior to publishing BOMs that reference those additions. If not, the BOM transactions may error out due to missing items or revisions which are referenced on the BOMs.

See [Chapter 8, “Maintaining Bills of Material,” page 147](#).

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points”

Integrating with a Manufacturing Execution System

You can integrate to a Manufacturing Execution System (MES) to enable the optimization of production activities from production order launch to completion of finished goods. MES functions include:

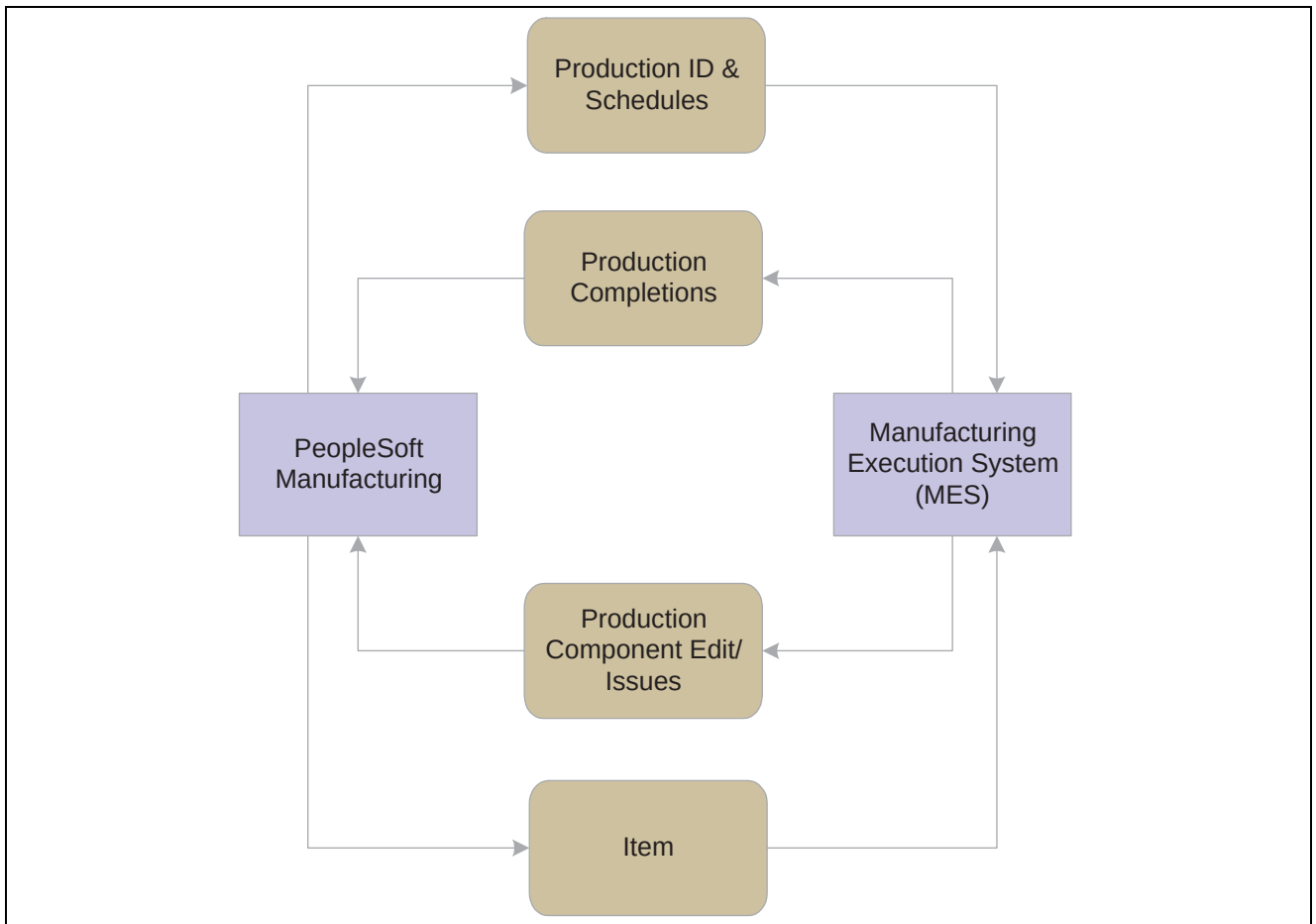
- Resource Allocation and Status
- Operations/Detail Scheduling
- Dispatching Production Units
- Document Control
- Data Collection/Acquisition
- Labor Management
- Quality Management
- Process Management
- Maintenance Management
- Product Tracking and Genealogy
- Performance Analysis

Overview of Manufacturing Execution System Transactions

Using PeopleSoft Manufacturing's integration, you can:

- Communicate production orders and production schedules from PeopleSoft to the MES using the Production Order Update EIP.
- Communicate item revision information from PeopleSoft to the MES using the Item Master EIP.
- Send operation and order completion and scrap information from the MES to PeopleSoft using the Completions EIP.
- Send component item usage from the MES to PeopleSoft using the Edit/Issue EIP.
- Analyze production performance in either PeopleSoft or the MES. If you are looking for more detailed operational information, you'll want to use the MES to gather this information.

You can use this functionality to transfer data between PeopleSoft Manufacturing and any Manufacturing Execution System.



Manufacturing Execution System Data Flow

You'll continue to use PeopleSoft Manufacturing for planning, material movement into WIP, validation of completion data, and production costing functions. PeopleSoft is the system of record for setup information, including item masters, bills of material, routings, and creating production orders.

See Also

Chapter 1, "Getting Started with PeopleSoft Manufacturing," PeopleSoft Manufacturing Integrations, page 6

Using Manufacturing Execution System Transactions

When you add or modify production with a status of Firm or greater, component lists, operation lists, and output lists, the system creates a publish message for the MES to pick up. The system also creates a publish message when changes are made using background programs.

You manage errors for the Completions and Edit/Issues transactions using Transaction Maintenance.

You use the Publish Outbound Transactions page to initiate the outbound publish process for the Production Order Update EIP and the Item Master outbound EIP.

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, "Managing PeopleSoft Supply Chain Management Integration Points".

Using the Item Master Transaction

You can publish item revision information to the Manufacturing Execution System using the Item Master outbound EIP. This is an outbound, asynchronous message. When you create or modify a revision, approve a revision-controlled item, or add business unit attributes to a revision-controlled item, the system publishes an item revision message to the Manufacturing Execution System.

See [Chapter 8, “Maintaining Bills of Material,” page 147.](#)

Using the Production ID/Production Schedule Manufacturing Execution System Transaction

Use the Production Order Update EIP to export production ID or production schedule changes to an external system. This is an outbound, asynchronous message.

See [Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371.](#)

Using the Completions Manufacturing Execution System Transaction

Use the Production Completions EIP to import information into PeopleSoft Manufacturing. This is an inbound, asynchronous message.

See [Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” page 585.](#)

Using the Edit/Issues Manufacturing Execution System Transaction

Use the Production Order Issue EIP to import edit or issue component information from a third-party system. This is an inbound, asynchronous message.

See [Chapter 23, “Completing Operations and Recording Scrap,” page 521.](#)

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points”

Integrating with Agile Product Collaboration™ 8.0 or 8.5

We’ve enhanced PeopleSoft 8.8 Manufacturing so that you can now send item, revision, and manufacturing bill of material (BOM) information using Agile™ change orders that originate from the Agile Product Collaboration™ web-based or Windows® applications. This is achieved through using a new PeopleSoft Adapter designed for use with Agile Product Collaboration™ (supported for versions 8.0 or 8.5 only) and is provided by PeopleSoft.

Use the Bill of Material EIP to import item, revision, and BOM information from Agile Product Collaboration™ 8.0 or 8.5. This is an inbound, asynchronous message.

See [Chapter 1, “Getting Started with PeopleSoft Manufacturing,” PeopleSoft Manufacturing Integrations, page 6.](#)

See [Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),” page 65.](#)

CHAPTER 6

Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5)

This chapter provides overviews of the PeopleSoft Manufacturing to Agile Product Collaboration™ 8.0 or 8.5 integration and describes how to:

- Set up Agile Product Collaboration™ for use with PeopleSoft 8.8 Manufacturing.
- Set up PeopleSoft 8.8 Manufacturing for use with Agile Product Collaboration™.
- Install the PeopleSoft Adapter in the Agile™ environment.
- Run the PeopleSoft and Agile™ integration.
- Review and correct PDX change order exceptions.
- Review important implementer and end-user guidelines.
- Troubleshoot the Agile™ integration.
- Modify the PeopleSoft Adapter.

Understanding the Agile™ Integration

You can use PeopleSoft 8.8 Manufacturing to send item, revision, and manufacturing bill of material (BOM) information by using Agile™ change orders that originate from the Agile Product Collaboration™ web-based or Windows® applications. PeopleSoft provides a new PeopleSoft Adapter designed for use with Agile Product Collaboration™ (supported for versions 8.0 or 8.5 only) to make this possible. This adapter makes use of the product data exchange (PDX) version 1.0 XML format for integration. This chapter assumes that the implementer has a technical and functional understanding of the Agile™ system.

Note. When referencing Agile™ related products within this chapter, we are referring to the 8.0 or 8.5 versions of Agile™.

This chapter is primarily intended for the implementer and administrator for the PeopleSoft to Agile™ integration, but it also contains specific end-user information.

Note. The term PDX refers to the XML files containing change order information that is sent from Agile™ to PeopleSoft.

Important! Although you may have already configured your Agile™ system to meet your company's needs, you may require additional configurations to the PeopleSoft Adapter to take advantage of your Agile™ system depending on the information that you want sent to PeopleSoft. While this chapter mentions some areas of configuration, it is not a document that explains how to perform a configuration.

Note. For more information regarding additional modifications to the PeopleSoft Adapter, contact your account executive.

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Reviewing and Correcting Change Order Exceptions, page 121

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Reviewing Important Implementer and End-User Guidelines, page 127

Overview of the Agile™ to PeopleSoft Product Data Exchange (PDX) Integration

PeopleSoft 8.8 Manufacturing integrates with Agile Product Collaboration™ that enables you to send item, revision, and manufacturing BOM information by using Agile™ change orders. This is achieved by using a new PeopleSoft Adapter for Agile™ that resides on your Agile™ server.

Specifically, the PeopleSoft Adapter integrates with Agile™ engineering change order (ECO) and manufacturer change order (MCO) subclasses to support inbound item (part) and BOM information into PeopleSoft 8.8 Manufacturing. This integration is one-way only (inbound to PeopleSoft), and supports one Agile™ system to one PeopleSoft system (single business unit).

In general, implementing an Agile™ integration implies that your Agile™ system is the master data source for items, revisions, and BOMs instead of PeopleSoft. Therefore, when this Agile™ integration is implemented, use PeopleTools security to severely restrict access (disallow changes) to item, revision, and BOM maintenance functions within PeopleSoft. Generally, these maintenance functions should only be done in PeopleSoft for the data elements that are *not* maintained through the Agile™ system, for example, costing, purchasing or planning attributes on the Item Master. This maintenance depends on your specific implementation of Agile™, as well as any modifications that you have made.

To extract change order information from Agile™, the PeopleSoft Adapter looks for released change orders and a Send to PeopleSoft Agile™ Page Two user-defined value to indicate that the change order should be sent. When found, the adapter changes the status of these change orders to In Process, extracts the information in PDX 1.0 XML format, and then sends the PDX file to the PeopleSoft gateway that supports your manufacturing installation for inbound processing.

The PeopleSoft Adapter includes the functional capability to support:

- *New Product Introductions:* As new products are ready for release, all associated items, revisions, and BOMs can be associated with change orders and sent to PeopleSoft.

You determine how to map your Agile™ product life cycles into PeopleSoft for the status of current and future items.

- *Change Control:* As products go into production (and under change control), you can use change orders within Agile™ to introduce new revisions, components, and associated BOM markups.
- *Item Phase Out:* As component or assembly items reach end of life, you can control discontinuing those items through Agile™ change orders by setting the life cycle phase.

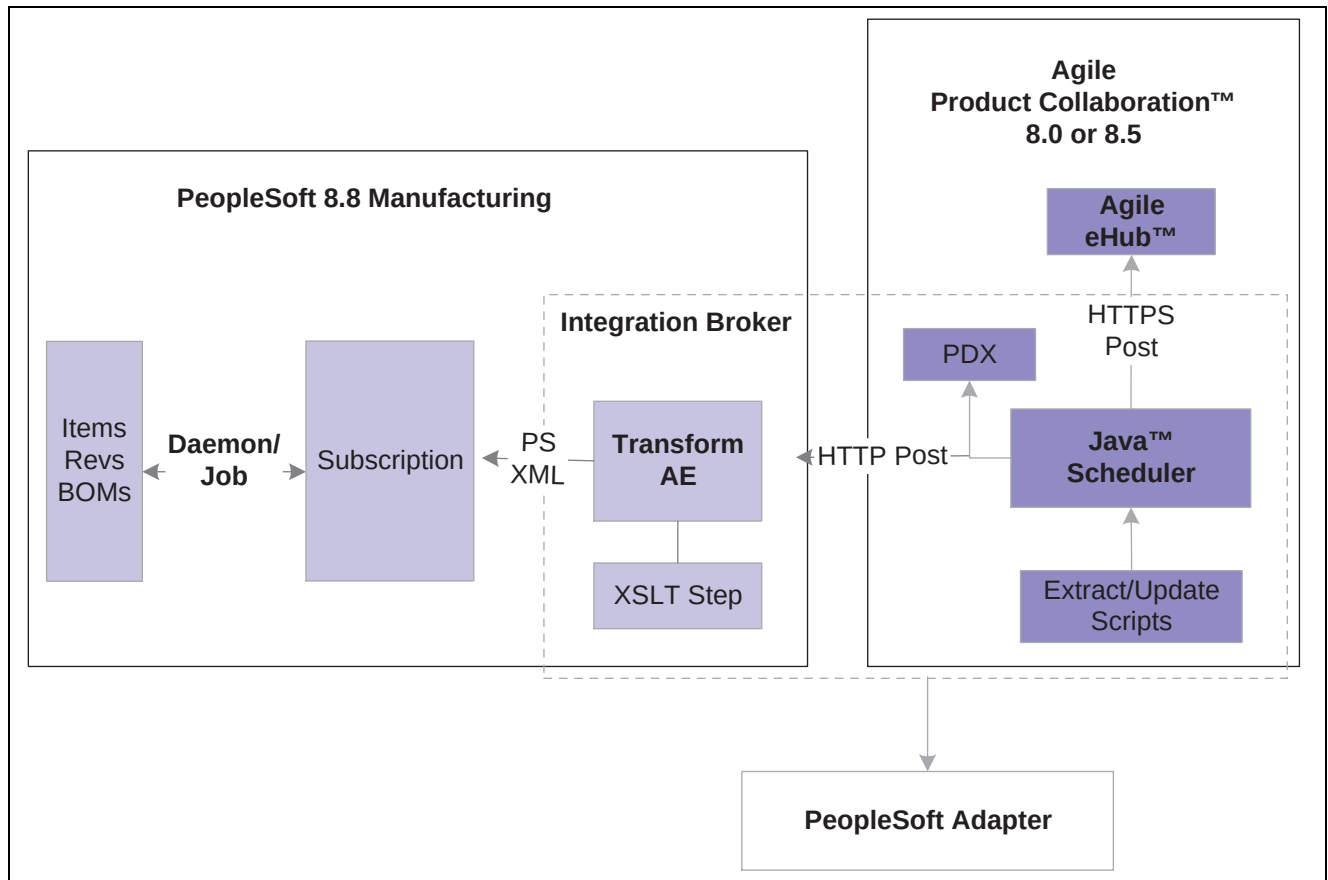
Specific life cycle phases in Agile™ can be mapped to the Discontinue item status within PeopleSoft.

Important! The PeopleSoft Adapter is designed for the ongoing introduction of new products (items, revisions, BOMs) and changes. The adapter is not designed for *mass loading* or *mass syncing* of Agile™ information into PeopleSoft.

When the adapter is enabled, it assumes that any existing product structures residing and released in Agile™ are already present and at the same revision level within the PeopleSoft system. This includes the Revision history on BOMs within PeopleSoft. This step should be handled separately as part of your initial implementation project.

The PeopleSoft Adapter includes and utilizes these components to enable this integration:

- A Java™-based scheduler that enables “polling” the Agile™ system for new changes, and then sending these changes to PeopleSoft.
This scheduler also includes a configuration file that controls the frequency of extracting information from Agile™.
- Two PeopleSoft-delivered Agile™ integration scripts utilized by the Java™ Scheduler to extract and format the changes into PDX 1.0 XML files.
- The PeopleSoft Integration Broker and related PeopleSoft Application Engine processes to handle the inbound Agile™ XML file and to translate these changes—using PeopleCode and Extensible Stylesheet Language Transformations (XSLT)—into PeopleSoft XML formats, and then update the items, revisions, and BOMs within PeopleSoft.
- An inbound PDX Change Order Exceptions component and associated alert to provide exception-based email notifications if errors occur.



Integrating PeopleSoft Manufacturing with Agile Product Collaboration™ 8.0 or 8.5

Overview of Required Setup and Considerations for Integration

This section discusses:

- Agile Product Collaboration™.
- PeopleSoft 8.8.
- The PeopleSoft Adapter on the Agile™ server.
- The integration checklist.

Agile Product Collaboration™

To enable the baseline integration with PeopleSoft, you are generally required to perform these tasks:

1. Define some required and optional PeopleSoft user-defined (Page Two) fields in Agile Administrator™.
2. Configure some field attributes in Agile™ such as maximum field sizes, and populate setup data (list values) in Agile™ for item categories or valid units of measure (UOMs).

3. You must evaluate your use of workflows, product life cycle statuses, change order classes, and other special Page Two user-defined fields to determine if any further modifications may be required to the PeopleSoft Adapter.

Important! Change orders must have a status of Released, and this status is used to control the data that is sent to PeopleSoft 8.8 Manufacturing.

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Configuring the PeopleSoft Adapter, page 136

PeopleSoft 8.8

Once you have defined usage of valid Life Cycle status and pertinent Page Two fields within Agile Administrator™, you can then set up PeopleSoft 8.8 Manufacturing by defining default and mapping information within the Installations Options - Manufacturing page.

In addition, certain PeopleSoft Integration Broker and messaging information specific to the Agile™ integration is also required, which enables PeopleSoft to receive the XML messages from Agile™ in the PDX 1.0 format.

Within PeopleSoft, you also set up a Daemon program and related job designed to process inbound change orders (within the PDX 1.0 messages) for items and BOMs from Agile™ into PeopleSoft master tables.

The PeopleSoft Adapter on the Agile™ Server

The third overall setup step is to install and run the PeopleSoft Adapter. This adapter is written in Java™ and is designed to poll and extract only specific released change orders (ECOs) and MCOs by default from Agile™. This is accomplished using Agile™ scripting language. The PeopleSoft Java™ Scheduler includes a configuration file for the basic configuration of your installation of the PeopleSoft Adapter. Once you have configured the adapter, it can be started and newly released change orders can be sent to and processed in PeopleSoft.

Note. If you require that different change order subclasses be extracted from Agile™, you may need to modify the two PeopleSoft-delivered extract and update scripts used with the PeopleSoft Adapter.

Note. If you require different translations of PDX data into PeopleSoft, you may need to modify the XSLT translations defined for the Agile™ integration within the PeopleSoft Integration Broker.

See Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Installing the PeopleSoft Adapter in the Agile™ Environment, page 110.

Integration Checklist

This checklist is useful when your first install the PeopleSoft Adapter. It is a summary of the topics covered within this chapter.

Note. This checklist intentionally does not cover any specific modifications s you may need related to special Page Two user-defined fields or related PeopleSoft Adapter modifications. We recommend that you first install your Agile™ integration in a test environment where a basic integration can be accomplished. This gives you a better understanding of how the integration works prior to attempting any modifications.

Integration Checklist

Agile™ Setup Tasks	Description	Completed
1. Set up required Agile™ Page Two user-defined fields.	Add additional Page Two user-defined fields for ECOs and MCOs using Agile Administrator™. These fields are required for the PeopleSoft Adapter.	(Yes or No)
2. Map important field sizes and values between Agile™ and PeopleSoft.	Set appropriate field size lengths (maximum) within Agile Administrator™. Set appropriate fields as required.	(Yes or No)
3. Populate required PeopleSoft setup data in Agile™.	Add list values such as valid item categories, UOMs, and so forth using Agile Administrator™.	(Yes or No)

PeopleSoft 8.8

PeopleSoft 8.8 Manufacturing Setup Tasks	Description	Completed
1. Set up PeopleSoft Installation Options.	Create basic life cycle mappings, defaults, and other basic mappings for data not delivered from Agile™ in standard PDX 1.0 XML.	(Yes or No)
2. Set up the PeopleSoft messaging gateway.	a. Activate the AGILE_NODE. b. Activate node transaction information for AGILE_NODE. c. Activate relationship and transaction modifiers within the PDX to PSFT Relationship. Relationship itself has a status and there is an individual status for each modifier. d. Activate messages in PeopleSoft Application Designer (ITEM_SYNC, BOM_SYNC, PDX_MSG), channels (PDX), and the subscription properties in PeopleSoft Application Designer (ITEM_SYNC, BOM_SYNC messages).	(Yes or No)

PeopleSoft 8.8 Manufacturing Setup Tasks	Description	Completed
3. Turn off Flag 1 within Data Maint Setup pages for ITEM and BOM transaction types.	Flag 1 in this setup page indicates that you do not want to auto-process inbound messages as they are received. This is important for the Agile™ integration to control the flow and updating of Agile™ change orders.	(Yes or No)
4. Set up the PDX Alert and PDX_DMON Daemon group for processing inbound messages from Agile™.	a. Set up the run control for the PDX Alert. The PDX Alert allows you to notify a specific user by using email when exceptions occur within PeopleSoft due to the processing of inbound changes from Agile™. b. Set up the Daemon to process inbound changes. The PDX_DMON Daemon group must be set up and running for a process scheduler to monitor inbound PDX messages and start the PDX_JOB when needed.	(Yes or No)

PeopleSoft Server

PeopleSoft Adapter Setup Tasks	Description	Completed
1. Make sure that Java 1.4 or a later version is installed and set up correctly on the client where the PeopleSoft Process Scheduler is to run.	Java 1.4 or a later version is required because it includes JSSE which is a requirement for the PeopleSoft adapter to connect and request information from Agile™.	(Yes or No)
2. Set up certificates and keystores.	a. Set up Server and Client SSL certificates for Agile Onramp™ access. b. Install Agile™ keystore and class files for Agile Onramp™ access. Agile™ connectivity with the PeopleSoft Adapter requires an Agile™ keystore authentication (as a client) to the Agile™ server.	(Yes or No)

PeopleSoft Adapter Setup Tasks	Description	Completed
3. Run the test install script.	Run a test install script for the PeopleSoft Adapter, SSL, and Agile™ keystore to verify that the SSL and Agile™ keystore are installed correctly.	(Yes or No)
4. Configure the PeopleSoft Adapter.	Set up the PeopleSoft Adapter configuration file in preparation to run the PeopleSoft Adapter.	(Yes or No)

Note. Contact your PeopleSoft account executive for actual modifications.

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Configuring the PeopleSoft Adapter, page 136

Prerequisites

Prior to integrating Agile Product Collaboration™ with PeopleSoft 8.8 Manufacturing, you must first install:

- Your PeopleSoft 8.8 Manufacturing software.
- Your PeopleSoft Integration Broker gateway supporting inbound messages for your manufacturing installation.
- The Agile Product Collaboration™ software and Agile eHub™ including web server access for Agile Onramp™.
- Java™ JDK (Java™ Development Kit) and JRE (Java™ Runtime Environment).
- Your PeopleSoft Adapter including the downloading of PeopleSoft-delivered Agile™ scripts, Java™ classes, and adapter configuration and command files delivered from PeopleSoft.

Important! You must also ensure that your current existing released items, revisions, and BOMs in Agile™ are already present and in sync with your PeopleSoft system prior to starting the PeopleSoft Adapter. *In sync* implies that the revision start dates in PeopleSoft match the effective dates of those that were released previously from Agile™—if releases do exist—and that component effectivity for components on the BOMs also align with the date, revision, and markup information as in Agile™.

See Also

PeopleSoft PeopleTools PeopleBook: Integration Broker

Setting Up Agile Product Collaboration™ for Use with PeopleSoft 8.8 Manufacturing

This section discusses the considerations for your Agile™ integration to PeopleSoft, as well as other actions that you need to take to ensure proper integration of the two systems.

This integration requires that you first evaluate the custom use of any Agile™ change order subclasses, custom fields, workflows, and so forth to determine whether the PeopleSoft Adapter needs modification.

Note. The standard integration of the adapter supports the change order subclasses for ECOs and MCOs only. If you require additional subclasses, you must modify the PeopleSoft-delivered Agile™ scripts to include or exclude appropriate subclasses.

Required Agile™ Page Two User-Defined Fields

This table outlines the Page Two fields that you must define using Agile Administrator™.

PeopleSoft requires that a few user-defined Page Two fields be defined. These fields must be defined in Agile™ *exactly as indicated* in the table. By default, the adapter looks for these specific labels in the Page Two value column.

Add the Page Two fields defined as indicated in the table for all appropriate Agile™ change order and item subclasses, including the item subclass document if you intend to use components on BOMs, which represent a document-related item that you intend to send to PeopleSoft.

The PeopleSoft Adapter looks for these values to be in place for ECO and MCO classes to enable sending changes to PeopleSoft, and item part and document subclasses to provide required values for creating the item in PeopleSoft. As an alternative to adding the required item and document subclasses as Page Two values (needed specifically for cost element and cost group profiles), you can modify the adapter to derive or default these field values during XSLT translation.

Important! The Agile™ user-defined fields for use by the PeopleSoft Adapter must be associated with an Agile™ role, which has privileges (security) set to allow Modify Released Eng. Changes. This role must be defined so that it can update any released change orders with Send to PeopleSoft, Send to PeopleSoft Status, and Resend Attempts values. Use Agile Administrator™ to modify the roles and privileges for a specific role (such as a change analyst) and to modify the Modify Released Eng. Changes setting to include these Page Two fields in the AppliedTo list. If this is not done, the PeopleSoft Adapter fails as it tries to update these Page Two fields.

Important! By default, all values are case sensitive and must be defined as indicated with the exception of Cost Element and Cost Group Profile (for items). These two fields should be defined according to the setup in the Installation Options - Manufacturing page.

Note. For Send to PeopleSoft, Send to PeopleSoft Status, and Resend Attempts Page Two values (such as the Agile™ label), it is possible to use different value (label) names by configuring the PeopleSoft Adapter extract and update scripts.

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Configuring the PeopleSoft Adapter, page 136

Your Agile™ documentation

Required Agile™ Page Two Fields

Define these fields exactly as indicated.

For Agile™ Class	Use a Page Two Type	Define a Page Two Value	Assign Agile™ List Values of	Field Usage	Recommended Default Value
Change Orders Class (ECOs) and Manufacturer Orders Class (MCOs) Note. If you modify the PeopleSoft Adapter script to use your own change order subclasses, those subclasses must have this Page Two field defined as well.	List Field	Send to PeopleSoft	On Release Yes No	This field should be accessible to users who are authorized to send the ECO to PeopleSoft. The PeopleSoft Adapter uses this field to determine if this specific ECO or MCO needs to be sent to PeopleSoft. The adapter looks at ECOs with a status of <i>Released</i> .	If you intend to send released ECOs or MCOs manually (you want to review them first), set the field to <i>No</i> . If you want released ECOs to be sent automatically, set the field to <i>On Release</i> . Note. By default, the adapter sends any MCOs or ECOs with any life cycle status to PeopleSoft.

For Agile™ Class	Use a Page Two Type	Define a Page Two Value	Assign Agile™ List Values of	Field Usage	Recommended Default Value
Change Orders Class (ECOs) and Manufacturer Orders Class (MCOs) Note. If you modify the PeopleSoft Adapter script to use your own change order subclasses, those subclasses must have this Page Two field defined as well.	Text Field	Send to PeopleSoft Status	NA	This display-only field is updated when the PeopleSoft Adapter extracts the ECO. When the ECO is sent successfully, the status is set to Sent (Manually) if these conditions exist: • The ECO was sent by a user who selected Yes and Sent (On Release). • The ECO was sent after the ECO reached the workflow status of Released and the Send to PeopleSoft value is On Release. Note. The PeopleSoft Adapter writes error text to this field if there is a problem generating or sending the ECO to the PeopleSoft gateway.	Pending

For Agile™ Class	Use a Page Two Type	Define a Page Two Value	Assign Agile™ List Values of	Field Usage	Recommended Default Value
Change Orders Class (ECOs) and Manufacturer Orders Class (MCOs) Note. If you modify the PeopleSoft Adapter script to use your own change order subclasses, those subclasses must have this Page Two field defined as well.	Number Field	Resend Attempts	NA	The adapter uses this display-only field if there is a problem sending the ECO to PeopleSoft, for example, your PeopleSoft message gateway is down temporarily. When a problem occurs, the adapter continues to attempt to send the ECO to PeopleSoft up to three times. This field is incremented up to three times.	0 (zero) Note. The default value for this field must be 0 (zero and not a space).

For Agile™ Class	Use a Page Two Type	Define a Page Two Value	Assign Agile™ List Values of	Field Usage	Recommended Default Value
Part Class and Document Class (Items)	List Field	Cost Element	This list is user defined. Note. Starting in PeopleSoft 8.8 the setup of 'Cost Element' page two field is optional in Agile™ if you alternatively define a default value for Cost Element within Item Defaults within PeopleSoft. If you do define this field within Agile you must add at least one valid cost element from PeopleSoft.	This field can be passed for new incoming buy items to PeopleSoft 8.8. You must also map this particular Page Two field within the Agile™ Cover page.	Set the Agile™ default to your most commonly used cost element.
Part Class and Document Class (Items)	List Field	Cost Group Profile	This list is user defined. Note. Starting in PeopleSoft 8.8, the setup of the 'Cost Group Profile' page two field is optional in Agile if you alternatively define a default value for Cost Group Profile in Item Defaults within PeopleSoft. If you do define this field within Agile you must add at least one valid cost group profile from PeopleSoft.	This field can be passed for new incoming buy items to PeopleSoft 8.8. You must also map this particular Page Two field within the Agile™ Cover page.	Set the Agile™ default to your most commonly used cost group profile.

Optional Agile™ Page Two Fields Supported Without Modification

These Page Two fields can be defined within Agile™ and can be mapped to PeopleSoft fields without the modification of scripts or XML transformation (XSLT). To enable these fields, associate your Agile™ Page Two field name with the appropriate field within PeopleSoft using the Installation Options - Manufacturing page.

Optional Agile™ Page Two Fields (not requiring modification)

For Agile™ Class	Use a Page Two (or User-Defined Field Type of Page Two)	Define Page Two (or User-Defined) Value	Assign Agile™ List Values of	Field Usage	Recommended Default Value
Part Class and Document Class (Items)	List Field	Source Code	Make Buy Floor Stock Expense	This field should be accessible to users who need to set the source code for new items	Buy
Part Class and Document Class (Items)	List Field	UOM	This list is user defined. You must add at least one valid UOM from PeopleSoft.	This field should be accessible to users who need to set the UOM for new items. If this field is not being used, the Unit of Measure field on PeopleSoft Installation Options - Manufacturing page must be set up.	Set the Agile™ default to the most commonly used UOM.
BOM Class (bill of material)	Text	BOM Op Seq (BOM operation sequence)	NA	This field should be accessible to users who need to set the operation sequence for BOM components in PeopleSoft. This option is provided when a component must exist on a BOM more than once at the same revision level. PeopleSoft requires that the operation sequence be different between each entry on the BOM for the same item number.	0 (zero)

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Setting Up PDX Installation for the Agile™ Integration, page 99

Additional Agile™ Page Two Fields or Use of Other Agile™ Fields

If you have other Agile™ Page Two fields not listed in the previous table in use with your implementation, or if you are using other existing Agile™ fields to store information you want mapped into PeopleSoft, you can accomplish this through modification.

It is possible that the additional information you may require could already be included in the PDX XML files being sent to PeopleSoft. If the inbound PeopleSoft messages for items (ITEM_SYNC) or BOMs (BOM_SYNC) support the additional values, then it is likely that a modification is required to the XSLT translation only within PeopleSoft.

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Configuring the PeopleSoft Adapter, page 136

Mapping Important Field Sizes and Values Between Agile™ and PeopleSoft

You must configure certain Agile™ field sizes, required status, and in some cases, the value to ensure that Agile™ data is compatible with PeopleSoft requirements.

The table that appears in this section indicates critical fields used in the integration:

- The Agile™ columns describe the Agile™ object and field.
- The PDX 1.0 columns describe the standard XML tag name where the value is stored when the message is sent to PeopleSoft.

These columns are for informational purposes only.

- The PeopleSoft columns identify the destination record and field name of the master table in PeopleSoft, as well as the field size and required status.

Important! For each PeopleSoft field, find the corresponding Agile™ object or field and make the appropriate settings within Agile Administrator™ to set the Agile™ field to the appropriate maximum size and required status. By performing this step, you ensure greater reliability of change orders sent from Agile™ to PeopleSoft. When a field value is longer than the PeopleSoft maximum length, the value is either truncated or fails within PeopleSoft.

- The Additional Notes column contains special additional instructions regarding the implementation in Agile™.
-

Note. All values must be defined as indicated and are case sensitive.

Mapping of Agile Product Collaboration™ Data with PDX 1.0 and PeopleSoft 8.8
Manufacturing Master Item (setid) Record Values

Agile™		PDX 1.0		PeopleSoft			
Object	Agile™ Field (GUI)	PDX Field (XML)	PeopleSoft Field (GUI)	Record and Field Database Names	Field Size (not to exceed this length in Agile™)	Required?	Additional Notes
Item	Number	Item/itemIdentifier	Item ID	master_item_ tbl.inv_item_id	18	Yes	None
Item	Part Category	Item/category	Category Code	master_item_ tbl.category_cd	18	Yes	You must manually maintain a list of valid PeopleSoft item categories in Agile™.
Item	Description	Item/description	Item Description	master_item_ tbl.descr	60	Yes	Sets the short, char 60 and long item descriptions in PeopleSoft for new items.
Item	Lifecycle Phase (ECO)	AffectedItem/ globalLifeCycle PhaseCode	Item Status	master_item_ tbl.item_status_ current	1	Yes	Mapping setup is required on the PeopleSoft Installation Options - Manufacturing page. Note. All Agile™ product life cycle (PLC) statuses for change orders with a status of <i>Sent to PeopleSoft</i> must be defined.
Item	Effective Date (ECO)	AffectedItem/ effectiveDate	Item status date	master_item_ tbl.item_status_ effdt	Date	Yes	This value is to be set to the date that the item was received from Agile™ for new items.

Agile™		PeopleSoft				
Item	Lifecycle Phase (ECO)	AffectedItem/ globalLifeCycle PhaseCode	Item Future Status	master_item_ tbl.itm_status_ future	1	No
						Mapping setup required on the PeopleSoft Installation Options - Manufacturing page. Note. All Agile™ PLC statuses for change orders with a status of sent to PeopleSoft must be defined.
Item	Effective Date (ECO)	AffectedItem/ effectiveDate	Item Future St Date	master_item_ tbl.itm_stat_dt_ future	Date	No
						Same purpose as item status date but for the future item status in PeopleSoft. Can be used to specify future obsolescence of items.
Item	NA	NA	Setid	master_item_ tbl.setid	5	Yes
						Setid is derived from the business unit value defined on the PeopleSoft 8.8 Manufacturing Definition page.

Agile™		PDX 1.0	PeopleSoft				
Item	Page Two	NA	Cost Profile Group	master_item_ tbl.cm_group	15	Yes	You must manually maintain at least one PeopleSoft cost group profile within Agile™. You may want to create a default value and make this field unavailable to Agile™ users.
Item	NA	Item/global ProductUnitOf Measure Code(if present)	UOM	master_item_ tbl.unit_ measure_std	3	Yes	This standard PDX field is not in use with Agile Product Collaboration™.

Agile™		PeopleSoft			
Item	Page Two	PDX 1.0		PDX 1.0	
		Item/Additional Attributes /Additional Attribute /<flexFldName	UOM	master_item_ tbl.unit_ measure_std	3
					Yes
					If this field is not passed based on the PDX standard, then the transformation program verifies whether a user-defined field has been set up on the PeopleSoft Installation Options - Manufacturing page. Note. If Agile™ does not find a flexible field, it uses the default value on the PeopleSoft Installation Options - Manufacturing page.

Agile™		PDX 1.0	PeopleSoft				
Item	Manufacturer Name/Name /Mfr. Name Note. All the above labels are used in Agile™.	AffectedItem/ApprovedManu facturerList Markups/Approved ManufacturerList Markup/Approved Manufacturer List MarkupRowNew (old)/Approved ManufacturerList Item/@manu fac turedBy	Manufacturer ID	item_mfg.mfg_ id	50	No	Manufacturer name maps to manufacturer ID in PeopleSoft. It is assumed that PeopleSoft already has manufacturers defined. However, in the event that a new Manufacturer is introduced into Agile™, PeopleSoft Adapter adds this to PeopleSoft table. In this case, the description of manufacturer must be added manually in PeopleSoft using online page.
Item	Manufacturer Part Number	AffectedItem/Approved ManufacturerList Markups/ApprovedManufac turerListMarkup/ApprovedManu facturerListMarkup RowNew(old) /ApprovedManu facturerListItem/ @manufacturer PartIdentifier	Manufacturer's Item ID	item_mfg.mfg_ item_id	50	No	This field is required if manufacturer information is passed from Agile™.

Agile™		PeopleSoft					
Item	Preferred Status	PDX 1.0	DFLT	item_mfg.preferred_mfg	1	No	
		AffectedItem/ Approved ManufacturerList Markups/ApprovedManufac turerListMarkup/ ApprovedManu facturerListMarkup RowNew(old)/ ApprovedManu facturerListItem/ @globalPreferred StatusCode					This field is required if manufacturer information is passed from Agile™. Note. For a specific item, there must be exactly one preferred manufacturer Item ID within PeopleSoft.
Item	NA	NA	UOM	Inv.items	3	Yes	Inv_items is an effective-dated item master child record within PeopleSoft (master_item_tbl). A row is added to this record as part of the inbound item processing.

Mapping of Agile Product Collaboration™ Data with PDX 1.0 and PeopleSoft 8.8 Manufacturing (Business Unit Item Record Values)

Agile™		PDX 1.0	PeopleSoft				Additional notes
Object	Agile™ Field (GUI)	PDX Field (XML)	PeopleSoft Field (GUI)	Record and Field Database Names	Field Size (not to exceed this length in Agile™)	Required?	
Item	Number	Item /itemIdentifier	Item ID	bu_items_ inv.inv_item_id	18	Yes	NA
Item	Lifecycle Phase (ECO)	AffectedItem/ globalLifeCycle PhaseCode	BU item status	bu_items_ inv.itm_status_ current	1	Yes	Mapping setup required on the PeopleSoft Installation Options - Manufacturing page. All Agile™ PLC statuses for change orders with a status of <i>Sent to PeopleSoft</i> must be defined.
Item	Effective Date (ECO)	AffectedItem/ effectiveDate	BU item status date	bu_items_ inv.itm_status_ effdt	Date	Yes	This value is to be set to the date that the item was received from Agile™ for new items.
Item	Lifecycle Phase (ECO)	AffectedItem/ globalLifeCycle PhaseCode	Item Future Status	bu_items_ inv.itm_status_ future	1	No	This is used to make items obsolete in the future (if the effective date is in future).

Agile™		PDX 1.0	PeopleSoft				
Item	Effective Date (ECO)	AffectedItem/ effectiveDate	Item Future St Date	bu_items_ inv.item_stat_dt_ future	Date	No	Same purpose as the item status date but for future item statuses in PeopleSoft. Can be used to specify future obsolescence of items.
Item	NA	NA	Business Unit	bu_items_ inv.business_unit	5	Yes	Appears by default from the PeopleSoft 8.8 Manufacturing Definition (setup) page.
Item	Page Two	NA	Cost Element	bu_items_ inv.cost_element	4	Yes	You must manually maintain at least one PeopleSoft cost element within Agile™. You may want to create a default value and make this field unavailable to Agile™ users. Note. This field can also be populated using item defaults.
Item	Page Two	Item/makeBuy(if present)	Source Code	bu_items_ inv.source_cd	2	Yes	Agile Product Collaboration™ does not include source code as a standard field.

Agile™		PeopleSoft				
		PDX 1.0	Source Code	bu_items_ inv.source_cd	2	Yes
	Page Two	Item/Additional Attributes/Add itionalAttribute /<flexFldName>				If this value is not passed based on the PDX standard, then Agile™ verifies to see whether a flexible field has been set up on the PeopleSoft Installation Options - Manufacturing page. If no value has been defined, then set the default value to <i>Make</i> if the item has a BOM, or <i>Buy</i> if you are adding the item for the first time.
Item Revision	NA	NA	Business Unit	bu_items_ inv.business_unit	5	Yes
Item Revision	Revision (ECO)	AffectedItem/ newRevision	Revision	en_ revision.revision	4	Yes
						When the Revision field is sent more than once in a day, only the last revision number is tracked within PeopleSoft for that item for that day.

Agile™		PDX 1.0	PeopleSoft				
Item Revision	Effective Date (ECO)	AffectedItem/ effectiveDate	Revision Effective Date	en_revision.date_ in_effect	Date	Yes	Revision effectivity is based on the effective date for the revision in the affected item list for the change order.
Item Revision	Description	AffectedItem/ description	Description	en_revision.descr	30	No	Revision description is set to the Agile™ change order number.
Bill of Material	NA	NA	Business Unit	bu_items_ inv.business_unit	5	Yes	Appears by default from the PeopleSoft 8.8 Manufacturing Definition (setup) page.

Agile™		PDX 1.0	PeopleSoft			
Bill of Material	Affected Item (ECO)	NA	Assembly Item	en_bom_header.inv_item_id	18	Yes
						The BOM header in PeopleSoft automatically changes to manufacturing BOMs (versus engineering) and a production type rather than rework. The header also automatically changes to BOM code 1 and a BOM quantity of 1. In addition, only the primary output is added and it is the same as the assembly part number.
Bill of Material	Item Number	BillOfMaterialItem /billOfMaterialItemIdentifier	Component Item	en_bom_comps.component_id	18	Yes
						All new BOM components are to be retrieved from the Item element. Changed BOM components are to be retrieved from BillOfMaterial Markups element under AffectedItem.

Agile™		PeopleSoft					PDX 1.0
Bill of Material	Item Revision	Component Revision	en_bom_comps.comp_rev	4	No	The field automatically becomes <i>blank</i> (the current revision) in PeopleSoft to match Agile™.	
Bill of Material	Find Num	Position Number	en_bom_comps.pos_nbr	4	No	NA	
Bill of Material	Quantity	Quantity	en_bom_comps.qty_per	5.4	Yes	Quantity per assembly is assumed for all components, rather than per order. Note. BOM quantity cannot contain 0 (zero) for PeopleSoft.	
Bill of Material	BOM Notes	NA	en_bom_comps.text254	254	No	The change order number that introduced the component is stored here.	

Agile™		PDX 1.0	PeopleSoft				
Bill of Material	NA	BillOfMaterial Item/Additional Attributes/Ad ditionalAttribute/ <flexFldName>	NA	en_bom_ comps.op_ sequence	4	N	Note. This field has been set up in the user-defined field mapping on the PeopleSoft Installation Options - Manufacturing page. This user-defined field is required if duplicate BOM items are allowed. Otherwise, BOM items fail in the PeopleSoft system.
Bill of Material	Reference Designator	BillOfMaterial Item/Reference Designators/ Reference Designator/ referenceDesign atorName	NA	en_ref_ desig2.ref_desig	20	No	NA

Important! Any document item subclass definition added to the Affected Items tab in Agile™ or included as a component on an Agile™ BOM is added to PeopleSoft as a regular item and component on the BOM. The PeopleSoft Adapter does not support integration of Agile™ documents such as document files.

Custom Workflows in Agile™

If you are using custom workflows within Agile™, any change order workflow used to release changes to PeopleSoft must have one step defined for a released workflow status.

The PeopleSoft Adapter enables you to send Agile™ change orders to PeopleSoft only when the ECO or MCO is in the released status. Once the change order is released, you can send the change automatically or manually to PeopleSoft. (The change order must be released first).

Therefore, any Agile™ workflows that you plan to use for change orders requiring integration with PeopleSoft must have a released status.

Setting Up PeopleSoft 8.8 Manufacturing for Use with Agile Product Collaboration™

These are the high-level steps that you must follow to set up your PeopleSoft system to integrate with Agile Product Collaboration™:

1. On the PeopleSoft Installation Options - Manufacturing page, define the general mappings for Agile™ PDX data to be sent to PeopleSoft.
2. Set up the PeopleSoft messaging gateway to receive PDX messages from Agile™.

The PeopleSoft and Agile™ connectivity is accomplished by using inbound XML (PDX 1.0 standard) messaging which requires the set up of a messaging gateway.

While areas that pertain to the XML messaging are contained in this document, basic understanding of setting up and using PeopleSoft messaging is assumed.

3. Define a Daemon group for the PeopleSoft Process Scheduler to manage the processing of inbound items, revisions, and BOMs received from Agile™ by using PDX messages.

The table in the next section contains a general list of the pages used in the setup of PeopleSoft 8.8 Manufacturing to integrate with Agile Product Collaboration™. Many of these pages are delivered with the correct default information, and you are not be required to change them. These are included for informational purposes only. However, any additional setup related to these pages is included in this document, and is also noted within the Usage column.

See Also

PeopleSoft PeopleTools PeopleBook: Integration Broker

PeopleSoft PeopleTools PeopleBook: Application Engine

Pages Used to Set Up PeopleSoft 8.8 Manufacturing to Integrate with Agile Product Collaboration™

Page Name	Object Name	Navigation	Usage
Installation Options - Manufacturing	INSTALLATION_MG	Set Up Financials/Supply Chain, Install, Installation Options, Manufacturing	Note. Setup required Set up PDX defaults by defining the Business Unit, Unit of Measure, and the Item Status Mapping fields. Also map the PeopleSoft Field to the Agile™ user-defined field name.
Node Info	IB_NODE	PeopleTools, Integration Broker, Node Definitions, Node Info	Note. Default setup is delivered. Maintain Agile™ node information.
Transactions	IB_NODETRXLIST	PeopleTools, Integration Broker, Node Definitions, Transactions	Note. Default setup is delivered. Maintain node transaction for Agile™. This node is used to post data from Agile™ back to PeopleSoft.
Transaction Detail	IB_NODETRX	Click the Edit link on the Transactions page, and select the Transaction Detail page	Note. Default setup is delivered, but minor changes are required. View and maintain comments regarding the node transaction. Note. If the status is inactive, the transaction must be activated.
Messages	IB_NODETRXMSG	Click the Edit link on the Transactions page, and select the Messages page.	Note. Default setup is delivered. View relevant messages regarding the node transaction.
Relationships - Nodes	IB_RELATIONSHIP	PeopleTools, Integration Broker, Relationships, Nodes	Note. Default setup is delivered, but minor changes are required. The relationship status needs to be active, because this indicates that the PDX message needs to be transformed into the PeopleSoft XML format.

Page Name	Object Name	Navigation	Usage
Trans Modifiers	IB_RELTRXLIST	PeopleTools, Integration Broker, Relationships, Trans Modifiers	Note. Default setup is delivered. View transaction modifier information.
Gateway	IB_GATEWAY	PeopleTools, Integration Broker, Gateways	Note. Setup required. Set up the PeopleSoft messaging gateway for Agile™.
PDX Relationship	IB_RELATIONTRX	Click the Edit link on the Initial tab on the Trans Modifiers page.	Note. Default setup is delivered. View and maintain PDX information for Agile™. Each transaction modifier must be activated here.
Daemon Group	AE_DAEMON	PeopleTools, Process Scheduler, Daemon Group	Note. Setup required. Create a Daemon group with the program name PDX_DMOM, which is a delivered application engine program. This page controls the sequential processing of imported Agile™ items and BOMs.
Servers	SERVERDEFN	PeopleTools, Process Scheduler, Servers	Note. Setup required. Dedicate a PeopleSoft Process Scheduler server to PDX processing and add the Daemon group created in Daemon Group Definition page within your server definition. Important! Do this for one server only.
Job Definition	PRCSJOBDEFN	PeopleTools, Process Scheduler, Jobs, Job Definition	Note. Default setup is delivered. A job definition called PDXJOB is delivered and it contains the programs needed to process new messages for items, revisions, and BOMs in the Data Maintenance component.

Page Name	Object Name	Navigation	Usage
Item Loader	RUN_IN_ITMLOAD	Data Exchanges, Process Transactions, Items, Item Loader	The required PDX run control is set up automatically at runtime. Use this page to define a run control to process for staged Agile™ items. Important! The PDX_CONTROL program (the first program in the PDXJOB) requires the use of a run control ID to be named <i>PDX</i>.
BOM Loader	EN_RUN_BOMSTAGE	Data Exchanges, Process Transactions, Manufacturing, BOM Loader	The required PDX run control is set up automatically for you at runtime. Use this page to define a run control for BOM Loader (EN_BOM_MSG) process to load BOM information from Agile™. Important! The PDX_CONTROL program requires the use of a run control ID to be named <i>PDX</i>.
Data Maint Setup1	EO_EIP_CTL_SETUP1	Define Integration Rules FDM, Management, Data Maint Utility Setup	Note. Default setup is delivered, but minor changes are required. Clear the Flag 1 check box to ensure that items and BOMs are not automatically processed. Run the Agile™ PDX job, so that it can be processed independently from the item and BOM loading processes.

Setting Up PDX Installation for the Agile™ Integration

Access the Installation Options - Manufacturing page.

Installation Options
Manufacturing

QPA Rounding Precision:

PDX Setup

Default Values

Business Unit:
Standard Unit of Measure:

Item Status Mapping

Item Status	LifeCycle Phase
Active:	Production, Preliminary
Discontinue:	Obsolete
Hold:	Pilot

User Defined Fields Mapping

*PeopleSoft Field	Agile Field Name		
Item Source Code	Sourcecode	+	-
Item Unit of Measure	UOM	+	-
Operation Sequence	BOMOpSeq	+	-
Cost Element	CostElement	+	-
Cost Profile Group	CostGroup	+	-

Installation Options - Manufacturing page

PDX Defaults

Business Unit

Select the value for the Manufacturing business unit that is to be assigned for changes received from Agile™.

Note. Agile Product Collaboration™ 8.0 or 8.5 supports a single site, so you are defining it here for PeopleSoft.

Standard Unit of Measure

Define a value for all inbound items being added. This is useful if all inbound items are to share the same UOM from Agile™ (such as EA).

Note. Alternatively, you can maintain a Page Two user-defined field in Agile™ for the appropriate item subclass (in Agile™) and map this field to the PeopleSoft field item UOM in the User Defined Field Mappings group box on this page.

Important! The Agile™ Field Name must match the field that has been defined in Agile™.

Item Status Mapping

Define the item life cycle status mapping for items with a status of:

- *Active*
- *Discontinue*
- *Hold*

This value is used when change orders are released to PeopleSoft. The PeopleSoft item status (Setid and BU) is based on the Affected Item Life Cycle value for each item on an Agile™ change order. Therefore, any valid Agile™ life cycle status that can be included on a change order sent to PeopleSoft must be mapped in this group box.

The LifeCycle Phase field on this page can contain commas to define a one-to-many mapping between PeopleSoft and Agile™. For example, the previous screenshot shows how the Agile™ life cycle status of Production and Preliminary are to be considered an active item status for the PeopleSoft item status.

Note. When a new item with an active status is added from Agile™ with an effective date greater than today's date, the Agile™ effective date of the affected item is ignored in PeopleSoft and the current date (today) is used at the item level (setid and business unit). This allows revisions and manufacturing BOMs to be created for the item in PeopleSoft.

However, future Agile™ effective dates are used for the start date of the item or revision, and also for future effective dates associated with a future item status. For example, if an item is currently active in PeopleSoft, you can send an Agile™ change order to specify future obsolescence of the item by having an Agile™ affected item with a future date and a future status intended to obsolete the item. In this case, the current PeopleSoft status remains active and a future status is to be specified as Discontinue.

User Defined Fields Mappings

Use this group box to define additional mappings for your integration without having to modify the PeopleSoft Adapter.

PeopleSoft Field and Agile™ Field Name

PeopleSoft standard values include:

- *Item Source Code* (item)
- *Item Unit of Measure* (item)
- *Operation Sequence* (BOM component)
- *Cost Element* (item)
- *Cost Group Profile* (item)

To enable these mappings, create a Page Two user-defined field using Agile Administrator™ for the appropriate Agile™ class. All classes are associated with the item in Agile™, except for the operation sequence, which is defined for the BOM component.

Important! The Page Two user-defined field names that you enter here must be defined on the Installation Options - Manufacturing page exactly (including the case) as you have defined them in Agile Administrator™. This is required because specific PeopleSoft Adapter translation code expects XML tags to be defined correctly or no mapping occurs for the value.

Note. These several pages describe the node and message relationships required to enable inbound messaging for PDX 1.0.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items,” Managing Inventory by Item Status

Maintaining Agile™ Node Information

Access the Node Info page.

Node Info

Contact / Notes

Properties

Connectors

Transactions

Portal Content

Node Name:

AGILE_NODE

*Description:

Agile Node for PSFT integratio

Copy

Company ID:

Rename

*Node Type:

External

☒ Active Node

*Routing Type:

Explicit

☐ Local Node

*Authentication Option:

None

☐ Default Local Node

☐ Non-Repudiation

Hub Node:

Master Node:

Image Name:

Code Set Group Name:

Node Info page

Note. These relationships have already been defined and are delivered to you; however, you must activate them.

The Agile™ Node (AGILE_NODE) has been defined for use with your Agile™ system. This node is required so that the Agile™ PDX XML can be posted to the PeopleSoft Adapter.

Active Node Select this check box to activate the Agile™ integration.

See Also

PeopleSoft PeopleTools PeopleBook: Integration Broker

Maintaining Node Transaction Information

Access the Transactions page.

	Edit	Transaction Type	Request Message	Request Message Version	Effective Date	Status	Delete
1	Edit	InAsync	BOM_SYNC	VERSION_1	01/22/2003	Inactive	
2	Edit	InAsync	ITEM_SYNC	VERSION_1	01/22/2003	Inactive	
3	Edit	InAsync	PDX_MSG	VERSION_1	01/22/2003	Inactive	

Transactions page

The Agile™ Node and transaction information has been defined for use with your Agile™ integration. These specific transactions have been defined with the AGILE_NODE, so that the PDX message can be converted into PeopleSoft internal messaging formats.

Click the Edit link to access the Transaction Detail page.

Viewing Node Transaction Details

Access the Transaction Detail page.

Node Name: AGILE_NODE

Transaction Detail

Effective Date: 01/22/2003 ***Status:** Active

Transaction Type: InAsync

Request Message: BOM_SYNC

Request Message Version: VERSION_1

☐ **Override Connector**

Comment:

[Return to Transaction List](#)

Transaction Detail page

- Status** The default is *Inactive*; however, you must change it to *Active* to integrate PeopleSoft with Agile™.
- In addition, you must change the status to *Active* for the BOM_SYNC, ITEM_SYNC, and PDX_MSG messages.
- Comment** Use this free-form field to add any relevant information for this transaction.

Viewing Node Transaction Messages

Access the Messages page.

The screenshot shows the 'Messages' tab selected in the 'Transaction Detail' section. The 'Node Name' is 'AGILE_NODE'. Below this, the 'Transaction Messages' section displays the following information:

Transaction Messages		Find View All	First	1 of 1	Last
Effective Date:	01/22/2003	Status:	Active		
Transaction Type:	InAsync				
Request Message					
Name:	BOM_SYNC	Version:	VERSION_1		
External Name:					

At the bottom right of the page, there is a link: [Return to Transaction List](#).

Messages page

Note. You do not need to modify any of these values on this page.

Defining the PDX Relationship to PeopleSoft

Access the Relationships - Nodes page.

The screenshot shows the 'Nodes' tab in the 'Relationships - Nodes' page. The 'Relationship ID' is 'PDX_TO_PSFT'. The '*Description' is 'Transform PDX XML'. The '*Relationship Status' is 'Active'. There are two '*Node Name' fields, both containing 'AGILE_NODE', each with 'Properties' and 'Contact' links. The 'Comment' field contains the text: 'Transform inbound asynchronous request message in PDX (Product Data eXchange) XML format into PeopleSoft XML messages, BOM_SYNC and ITEM_SYNC.'

Relationships - Nodes page

The PDX_TO_PSFT relationship (within the node definition) has been defined for use with your Agile™ integration. This relationship is associated with the AGILE_NODE which enables conversion of the PDX 1.0 XML file into PeopleSoft inbound asynchronous ITEM_SYNC and BOM_SYNC messages.

Relationship Status

This page is delivered with the default value of *Inactive*; however, you must change it to *Active* to integrate PeopleSoft with Agile™.

Viewing the Transaction Modifiers

Access the Trans Modifiers page.

The screenshot shows the 'Trans Modifiers' tab in the 'Relationships - Nodes' page. It displays a table of transaction modifiers for the PDX_TO_PSFT relationship and AGILE_NODE node. The table has columns: Edit, Initial Node, Transaction Type, Request Message Name, Effective Date, Status, and Delete. There are two rows of data, both with 'AGILE_NODE' as the initial node, 'IA' as the transaction type, 'PDX_MSG' as the request message name, '01/01/1900' as the effective date, and 'Inactive' as the status.

	Edit	Initial Node	Transaction Type	Request Message Name	Effective Date	Status	Delete
1	Edit	AGILE_NODE	IA	PDX_MSG	01/01/1900	Inactive	-
2	Edit	AGILE_NODE	IA	PDX_MSG	01/01/1900	Inactive	-

Trans Modifiers page

This page is display only.

Click the Edit link to access the Relationship - Transaction Modifier page.

Maintaining Transaction Modifier Information

Access the Relationship - Transaction Modifier page.

Relationship ID:	PDX_TO_PSFT		
Nodes:	AGILE_NODE	AGILE_NODE	
Transaction Modifiers			
Effective Date:	01/01/1900	*Status:	Inactive v
		Sequence number:	2
Initial			
Node:	AGILE_NODE	Transaction Type:	IA
Rqst Msg:	PDX_MSG	Version:	VERSION_1
Result			
Node:	AGILE_NODE	*Transaction Type:	IA v
Rqst Msg:	BOM_SYNC	Version:	VERSION_1
Transformations			
Request:	EN_PDX_BOM Q	Response:	Q
Return to Transaction List			

Relationship - Transaction Modifier page

Use this page to maintain the modifier that needs to be applied to each transaction for the initial node specified. Two transaction modifiers are defined: one to transform the PDX file into a BOM_SYNC message and the other to transform the same PDX file into an ITEM_SYNC message.

Status The default is *Inactive*; however, you must change it to *Active* to integrate PeopleSoft with Agile™.

In addition, change the status to *Active* for the BOM_SYNC and ITEM_SYNC messages.

Transformations

Request This is the PeopleSoft Application Engine program that is used to transform the PDX XML file received from Agile™.

See Also

PeopleSoft PeopleTools PeopleBook: Integration Broker

Activating Messaging Within PeopleTools Application Designer

The PDX_MSG message is defined in the PeopleSoft Application Designer for use with Agile™ inbound messages. This message is transformed into two PeopleSoft inbound asynchronous messages: ITEM_SYNC and BOM_SYNC. These two messages must also be activated within PeopleTools Application Designer. In addition, the subscription properties for ITEM_SYNC and BOM_SYNC messages must be activated.

The channels of ITEM_MAINTENANCE, BOM_MAINTENANCE, and PDX must also be activated.

Setting Up and Running the Daemon Group and Related Job to Process Inbound PDX Files

This section discusses how to set up and run a Daemon group to process the transformed BOM_SYNC and ITEM_SYNC messages into PeopleSoft master tables (after the change has been sent from Agile™). The PeopleSoft Adapter uses a Daemon tied to PeopleSoft Process Scheduler so that inbound messages can be monitored without launching excessive PeopleSoft Process Scheduler jobs.

The Daemon application engine program checks the stage table to determine whether there is any inbound set of change orders, which would result in items or BOMs being processed. It processes the changes for items, revisions, and BOMs received from Agile Product Collaboration™ by initiating the PDXJOB when necessary. The PDXJOB then drives the processes to ensure that one inbound pub ID (from a PDX message) is treated collectively and processed sequentially through the Item Loader (IN_ITMLOAD) and BOM Loader (EN_BOM_MSG) processes as part of the PDXJOB.

In addition, the PDXJOB includes an Alert process (PDXALERT) which notifies you of any processing errors.

This job should already exist and should be defined exactly as indicated in this screenshot:

The screenshot shows the 'Job Definition' tab in the PeopleTools Application Designer. The job is named 'PDXJOB' and is of type 'PSJob'. The description is 'Process inbound Items and BOMs'. The run mode is set to 'Serial' and the priority is 'High'. The process category is 'Default'. The 'Max Concurrent' field is empty. The 'Override Process Retry Count' checkbox is unchecked, and the 'Retry Count' field is empty. Below these fields is a 'Process List' table with four rows, each representing a process to be executed by the job.

	*Process Type	*Process Name	Description	Run Always On Warning	Run Always On Error		
1	Application Engine	PDX_CONTROL	PDX_CONTROL	☒	☒	+	-
2	Application Engine	IN_ITMLOAD	Item Loader	☐	☐	+	-
3	Application Engine	EN_BOM_MSG	EN_BOM_MSG	☐	☐	+	-
4	Application Engine	PDX_ALERT	PDX_ALERT	☐	☐	+	-

Job Description page

See Step 2.

The processing sequence is very important when Agile™ items, revisions, and BOM changes are sent to PeopleSoft. For example, item and revision information must be processed for a given change order prior to any BOM updates.

To set up item and BOM processing so that they do not automatically attempt to load at message subscription time:

1. Access the Data Maint Setup 1 page for transaction type *ITEM* and then for *BOM*.
 - a. Clear the Flag 1 check box to prevent items and BOMs from being processed automatically. Clear this check box for both the item and BOM transaction type. This prevents item and BOM messages from being processed immediately and allows the Agile™ PDX information to be properly staged for processing in PeopleSoft
 Clearing this check box provides greater reliability of your integration, because PeopleSoft items must exist or the BOM processing fails.
 - b. Save the page after you have cleared the Flag 1 check box for both the Item and BOM transaction types.

Important! This setup is done because it is *highly recommended* that you schedule the Item Load process and BOM Load process independent of the Agile™ send process to ensure the reliability of back end processing. This is because the Item and BOM Loader programs are designed to process large sets of changes at once, but not multiple sets of the same items or BOMs.

Note. If you have other ongoing uses of the ITEM_SYNC message outside of the Agile™ integration, the setting of this flag may have an impact on those non-Agile™ areas. When the Daemon is enabled, it creates instances of the Item Loader process that process any inbound set of items staged for processing. Therefore, take this into consideration during your implementation.

2. Access the PeopleTools Job Definition page and review the job named PDXJOB.

This PDXJOB job controls the processing of individual change order packages sent to PeopleSoft using a pub ID. The PDX_CONTROL controls the flow of these change orders by picking up item and BOM changes (IN_ITMLOAD and EN_BOM_MSG) from data maintenance in a FIFO (first in, first out) manner based on pub IDs that are ready to be processed. This ensures that all items for the pub ID are ready to be processed with the BOMs being sent.

Note. The PDX_CONTROL job automatically creates a run control and sets the appropriate values for processing for both the Item and BOM Loader processes with the run control ID of PDX. The PDX alert run control must be created manually and is used to establish parameters for the alert.

Note. Do not enter a value in the Recurrence Name field on the Job Definition Options page.

3. Set up the PDX Alert utility.

The PDXJOB job includes the PDX_ALERT program designed to search for any processing errors and send an alert to the appropriate users.

To facilitate exception processing, this email notification job is provided, which is included as the last process in the PDX_JOB initiated by the PeopleSoft Daemon. Each time an Agile™ package is processed, this job searches for any recent processing errors found in the PDX Change Order Exceptions page. If any errors are found, an email notification can be sent to users associated with the specified role. This email also includes a URL link back to the PDX Change Order Exceptions component where users can view the details of the errors. The email also includes a list of change orders that are in error, as well as the date and time that they were staged within PeopleSoft.

Important! The run control ID for this process must be manually created with the name of PDX to run as part of the PDX_JOB process.

See [Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),” Viewing Change Order Exceptions, page 122.](#)

Note. This notification is intended for use by a central administrator type role for any change order errors in PeopleSoft regardless of who released the change order.

Using the notification requires setup of the SMTP mail server for the PeopleSoft Process Scheduler.

4. Access the Role Definition page.
 - a. Create a new role that can be associated with all users who want to receive this email alert. This role does not need to contain any permission lists.
 - b. Associate this role with appropriate user profiles that should be included in the email notification.

Important! Make sure that each user has a valid default email address in the user profile. The mail is sent to the email entry that is marked as *primary* in the user profile.

See *PeopleSoft PeopleTools PeopleBook: Security*

5. Access the PDX Alerts page.
 - a. Create a run control ID that is to be used for each run of this utility.
To run this as part of the PDX_JOB, the run control ID must be named PDX.
 - b. Enter the role name created in step 4a. All users associated with this role are included on the email distribution.
 - c. The *Show errors occurring within the last ‘n’ Minutes* value is used to determine how far back to look for change order errors on the PDX Change Order Exceptions page. This setting can help determine how many times you are notified if there are errors. Because this program (by default) is set up to run any time a message is processed, you may want to set this value to a minimum number of minutes to include only the latest change order errors and to send an email only once.

If you want to be reminded of all errors in the PDX Change Order Exceptions page from the last day and receive notification each time the adapter is run, set this value to *480* minutes, assuming that the adapter is running 8 hours a day.
 - d. The URL field automatically changes to the current machine (web server) being accessed at this time, combined with the PDX Change Order Exceptions page. This URL is included in the exception emails to be sent.

- To direct the user to log into a different machine or web server, change the beginning part of the string, but leave the latter portion untouched as this directs the user to the correct component.
6. Access the Daemon Group page and set up the Daemon group.
 - a. Create a Daemon group named PDXDMON.
 - b. Add the program name PDX_DMOM to the Daemon group.

PDX_DMOM is a PeopleSoft Application Engine program that determines whether there is anything to be processed by the Item Loader and BOM Loader processes respectively. This Daemon is linked to PeopleSoft Process Scheduler and allows the inbound messages from Agile™ to be monitored without the overhead of starting a job to check each time.

7. Access the Servers page.

Define the Daemon servers page as indicated for an appropriate server and use the Daemon group created in the previous step.

Daemon Enabled	Select this check box.
Daemon Group	Select the <i>PDXDMON</i> value.
Daemon Sleep Time	Enter a value of 2.
Recycle Count	Enter a value of 10.

Note. After the Daemon group is assigned to a server, the Process Scheduler for that server must be restarted or rebooted.

Important! You should set up only one server with this Daemon. It requires a single instance per PeopleSoft database.

See Also

PeopleSoft PeopleTools PeopleBook: Application Engine

Installing the PeopleSoft Adapter in the Agile™ Environment

This section describes the steps to set up the PeopleSoft Adapter for Agile™ integration. The PeopleSoft Adapter is a client to the Agile Integration Server™ and uses httpost to communicate with Agile™. However, since the client includes a configuration file containing a signon password and client certificates for Agile™ access, we recommend that you the install the client on the Agile™ server itself.

The PeopleSoft Adapter for Agile™ includes:

- Server and Client SSL certificates for Agile Onramp™ access.
 - Agile™ keystore and class files installation for Agile Onramp™ access.
- Agile™ connectivity with the PeopleSoft Adapter requires an Agile™ keystore authentication (as a client) to Agile™ server.

Note. This is the authentication of the PeopleSoft Adapter *client* access to the Agile Onramp™ server.

- Running a test install script for the PeopleSoft Adapter and Agile™ keystore to verify that Java runtime including SSL and Agile™ keystores are installed correctly.
- Setup of the PeopleSoft Adapter configuration file in preparation to run the PeopleSoft Adapter.

Understanding the SSL Installation of Java™ Secure Socket Extension for Agile Onramp™ Access

The JSSE is a set of Java™ packages that enable secure internet communications. It implements a Java™ version of SSL and TLS (Transport Layer Security) protocols, and includes functionality for data encryption, server authentication, message integrity, and optional client authentication. JSSE is a required component when integrating the PeopleSoft Adapter to an Agile™ client and Agile eHub™ by using Agile Onramp™.

One of the primary requirements for running the adapter scripts through the Agile Onramp™ server for Agile Product Collaboration™ is the installation of Java™ 1.4 or later version which includes integrated SSL or JSSE.

Note. Your Agile Product Collaboration™ installation may automatically install Java v 1.3; however the PeopleSoft Adapter is certified for Java v 1.4. which includes JSSE extensions (required to use SSL but not included in Java 1.3). Make sure to install Java 1.4 for the client where the PeopleSoft adapter is to be run.

Server and Client Side SSL Certificates for Agile Onramp™ Access

Once you have Java 1.4 (which includes JSSE) installed, you must now set up the actual SSL certificates that authenticate the Agile™ client (PeopleSoft Adapter) to the Agile Onramp™ server.

Note. This section is not intended to provide training on SSL or certificates; however, it discusses the general requirements necessary for Agile Onramp™ access.

This procedure describes how to add a client side certificate to Java™ master certificates file (cacerts) using BEA WebLogic version 6.0. We used version 6.0 as an example only. These steps assume that you have previously set up the Agile Onramp™ SSL certificate.

1. Locate the certificate file that Agile™ BEA WebLogic is using.
To find this information, log on to the WebLogic console (for example: <http://<machine:port>/console>). Enter the username and password for your WebLogic installation.
2. Click the Servers link under WebLogic and then click the Agile™ Domain, AgileHCM.
3. Click the SSL tab and locate the value in the Server Certificate Chain File, for example, config/Agile/ca.pem (where ca.pem is replaced by your actual certificate file name).

Note. In this example, the Agile Onramp™ server is using the ca.pem file located in the configuration (Agile™) folder for SSL security.

4. Locate the appropriate file from the same folder (for example: c:\bea\wlserver6.0\config\agile\ca.pem) and copy it to the <java-home>\jre\lib\security folder.

This file contains the server certificate and must be added to the Java™ cacerts file (master certificate file) on the client side (see the next step). The Java™ cacerts file should be in the same folder in which the certificate file was just copied: <java-home>\jre\lib\security.

5. Insert the certificate into the Java™ cacerts file for the client.
 - a. Open a command prompt window and navigate to the folder containing the cacerts file (for example, <java-home>\jre\lib\security).
 - b. Enter this command on the DOS prompt:

```
keytool -import -file ca.pem -keystore cacerts
```

(where ca.pem is the correct certificate file for your installation)

Note. The command prompts you to enter the keystore password, which is the password for cacerts file (the default is normally `changeit`).

The certificate details are shown and Keytool asks whether the certificate is trusted. Enter *Yes* to confirm. The certificate is then added to the cacerts file. Here is an example of this session:

```
C:\bea\jdk131\jre\lib\security>keytool -import -file ca.pem -keystore cacerts
```

```
Enter keystore password: changeit
```

```
Owner: EmailAddress=support@bea.com, CN=Demo Certificate Authority, OU=Security,
O=BEA WebLogic, L=San Francisco, ST=California, C=US
```

```
Issuer: EmailAddress=support@bea.com, CN=Demo Certificate Authority, OU=Security,
O=BEA WebLogic, L=San Francisco, ST=California, C=US
```

```
Serial number: 0
```

```
Valid from: Tue May 30 14:37:44 PDT 2000 until: Fri May 14 14:37:44 PDT 2004
```

```
Certificate fingerprints:
```

```
MD5: 24:51:DB:84:38:18:B2:6B:EB:35:54:18:D0:18:5B:C6
```

```
SHA1: A6:79:89:20:96:0E:2D:6A:37:E9:AB:A1:6A:FC:C3:84:6E:5B:1D:09
```

```
Trust this certificate? [no]: yes
```

```
Certificate was added to keystore
```

Agile™ Keystore and Adapter Class Files Installation for Agile Onramp™

This section discusses how to install the Agile™ keystore file and required Java™ class files in a Windows® NT or Windows® 2000 client environment. The Agile™ keystore is necessary to authenticate the PeopleSoft Adapter (as an Agile™ client) to the Agile Onramp™ server.

Note. This is not the authentication of a client user to the Agile eHub™. It is the authentication of the client adapter to access the Agile Onramp™ server.

See [Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),” Server and Client Side SSL Certificates for Agile Onramp™ Access, page 111.](#)

To install Agile™ Keystore and Adapter Class Files for Agile Onramp™:

1. Locate the AgileOnRamp classes folder under your Agile™ installations main folder, for example <drive>:\Agile\AgileOnRamp\Classes.

Copy all the files supplied from your PeopleSoft 8.8 installation within the <drive>:\pt844\setup\agile folder to the AgileOnRamp folder (<drive>:\Agile\AgileOnRamp\Classes). The files to be copied from PeopleSoft are:

- *AgileOnRampClientKeyStore*: Agile™ keystore for PeopleSoft Adapter authentication.
- *ECO-PS-UPDATE.xml*: PeopleSoft Adapter update script for change orders.
- *ECO-PS-XTRACT.xml*: PeopleSoft Adapter extract script for change orders.
- *PSAgileClientAuth.class*: Class used by the PeopleSoft Adapter to authenticate its use with the Agile™ system.
- *PSAgilePostScript.class*: Class used by the PeopleSoft Adapter to post scripts requesting Agile™ change orders.
- *PSAgilePostScript\$1.class*: Class used by the *PSAgilePostScript.class*.
- *PSAgileScript.class*: Compiled version of the PeopleSoft Adapter.
- *PSAgileScript\$1.class*: Class used by the *PSAgileScript.class*.
- *PSAgileScript.java*: Java™ source code for the PeopleSoft Adapter.
- *PSAgileScript.config*: Configuration file that you need to modify for the adapter to work.
- *PSAgileScheduler.cmd*: Simple command file that contains the command line to start the PeopleSoft Adapter (for Windows® NT).
- *PSTestScript.xml*: File that contains a test script for Agile™ connectivity.
- *PSRunTestScript.cmd*: Command file to run *PSTestScript.xml*.

2. Locate your PeopleTools PIA installation and copy the *SimplePost* class and its required directory structure from your PeopleSoft installation to your Agile Onramp™ server.

This is necessary because the PeopleSoft Adapter relies on this class to post PDX messages from Agile™ to the PeopleSoft gateway. Simplepost must reside specifically in the AgileOnRamp\classes\com\PeopleSoft\pt\simplepost directory. For example:

```
copy <drive>:\pt844\webserv\PeopleSoft\applications\peoplesoft\PSIGW\WEB-INF
\classes\com\PeopleSoft\pt\simplepost to
C:\AgileOnRamp\classes\com\PeopleSoft\pt\simplepost
```

Important! You must create the same folder structure as indicated in step 2 in the AgileOnRamp\classes folder and place the SimplePost.class file in the simplepost folder.

Note. PeopleSoft generally installs SimplePost in the folder structure mentioned earlier. Search for SimplePost.class file in case you do not find it in the previous structure.

Running a Test Install Script for the Adapter, SSL, and Agile™ Keystore

This section contains a simple test program that must be run successfully *prior* to configuring and starting the PeopleSoft Adapter.

Before running the actual PeopleSoft Process Scheduler for the first time, test the installation of Java and JSSE (SSL) and Agile™ keystore files. There are two files that are delivered for testing connectivity to Agile™:

- A simple Agile™ test script which utilizes delivered Java™ class files to authenticate client and post to Agile™ using https and specified Agile™ username and password information.

This validates that you have SSL, client keystore, and Java™ class files in place and are ready to attempt successful connectivity to Agile™.

- A command file that actually launches Java™ to post the script. The two files included in this command file are:
 - *PSTestScript.xml*: File contains actual test script.
 - *PSRunTestScript.cmd*: Command file to run PSTestScript.xml.

To run a test install script for the PeopleSoft Adapter, SSL, and Agile™ Keystore:

1. Modify the PSRunTestScript.cmd file.

You must uncomment the Java™ command and define the URL, domain, port, username, and password in the command file before running it.

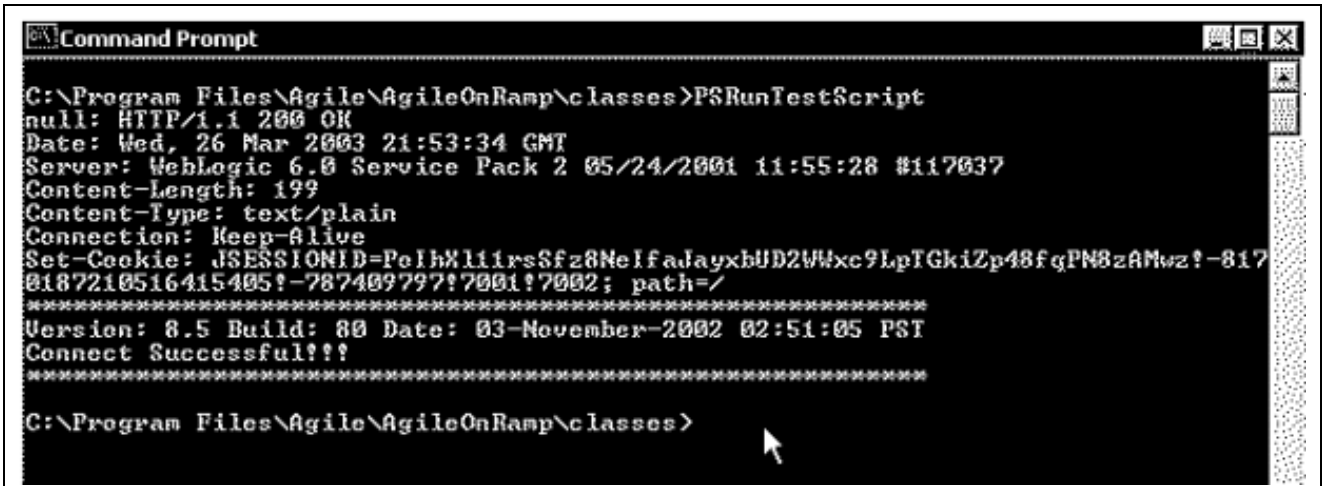
2. Run PSRunTestScript.cmd.

After running the command file mentioned earlier, you should see something similar to the screenshot with the ‘Connect Successful!!!’ string in the output.

Note. If you receive any errors, there is either a problem with your installation of JSSE, SSL certificate, Agile™ keystore, or class file setup.

3. The installation of your PeopleSoft Adapter is now complete.

You are now ready to set the configuration file parameters and start the PeopleSoft Java™ Scheduler for the PeopleSoft to Agile™ integration.



```

C:\Program Files\Agile\AgileOnRamp\classes>PSRunTestScript
null: HTTP/1.1 200 OK
Date: Wed, 26 Mar 2003 21:53:34 GMT
Server: WebLogic 6.0 Service Pack 2 05/24/2001 11:55:28 #117037
Content-Length: 199
Content-Type: text/plain
Connection: Keep-Alive
Set-Cookie: JSESSIONID=PolhXliirsSfz8NelfaJayxbUD2W4xc9LpTGkiZp48fgPN8zAMwz!-8170187210516415405!-787409797!7001!7002; path=/
*****
Version: 8.5 Build: 80 Date: 03-November-2002 02:51:05 PST
Connect Successful!!!
*****
C:\Program Files\Agile\AgileOnRamp\classes>

```

Checking to see whether PSRunTestScript.cmd ran successfully

See Also

[Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),” Server and Client Side SSL Certificates for Agile Onramp™ Access, page 111](#)

[Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),” Agile™ Keystore and Adapter Class Files Installation for Agile Onramp™, page 112](#)

Setting Up the Configuration File for the PeopleSoft Adapter

Once you have successfully run the test install program for SSL and Agile Onramp™ (PSRunTestScript.cmd) and have copied all the appropriate files that PeopleSoft delivered, you can set up your PeopleSoft Adapter configuration file. This file is located in your Agileonramp/classes directory and is called *PSAgileScript.config*. This file enables you to configure the adapter for:

- Connectivity to Agile Onramp™.
- Configuration for extracting change orders (interval timing and number of changes).
- Scheduling of the change order extracts from Agile™ (days of the week and time).
- Configuring which PeopleSoft gateway to post to and other messaging parameters.

Edit this file using Notepad® and set values according to your installation of the Agile Onramp™ server. Define the user name and password as *wCM* or *CM*. This user must have authority to update Page Two fields on change order objects.

There are two very important settings within this file: *interval* and *maxchangeorders*. These settings control how often the adapter attempts to extract readied change orders from Agile™ (*interval*), as well as the maximum number of change orders (ECOs and MCOs) to be included per extract (per interval) in the PDX message.

Note. Within PeopleSoft 8.8, change orders are processed in groups of item changes and additions, followed by groups of BOM changes and additions. The groups of items and BOMs are determined by the contents of each PDX file sent from Agile™, because each PDX file equates to one message (Pub ID) within PeopleSoft.

Some important things to consider regarding interval and maxchangeorder settings:

- The interval and maxchangeorder settings should be set to accommodate the typical volume of Agile™ change orders.

Depending on your business requirements, having a maxchangeorder value greater than one may not be desirable if there is a possibility that the *same* item is impacted (affected item) by multiple change orders simultaneously. This scenario can cause errors within PeopleSoft as PeopleSoft requires that each item and BOM change processed must contain the item or BOM only once in the PDX file.

Note. This requirement applies only if the item exists on the affected items list of an Agile™ change order.

There is no such restriction regarding component items listed on BOM markups. The same component can appear in multiple BOM markups

- If this is a common scenario in your environment, set the maxchangeorder value to one (combined with increasing the interval appropriately).
- If this is *not* a common scenario in your environment, you can set the maxchangeorders to a value greater than one.

However, if the same affected item occurs in two change orders, then you must manage the timing of change orders sent to PeopleSoft, so that the PDX file does not contain the same affected item in two different change orders. To avoid this duplication, send the changes manually during two intervals (to create two PDX files, for example, use the Send to PeopleSoft value of *Yes* when ready versus automatically sending *On Release*).

Settings for the PeopleSoft Adapter Configuration File

As a minimum, define those items marked in *italics* in the table.

Note. In this configuration file, any line beginning with a '#' is a *comment* line which is not recognized by the adapter.

Note. You can modify and save the adapter configuration file without stopping and restarting the PeopleSoft Java™ Adapter. If the Java™ Adapter is paused (interval set to 0), it searches for changes in this configuration file approximately every 10 seconds.

Settings for the PeopleSoft Adapter Configuration File	
<i>URL</i> =	Enter the URL to your Agile™ server (specify the machine and port). <i>https:// <machine:port> //AgileScriptServlet/script</i>
<i>Portnumber</i>	Enter the port number of the Agile™ server used in adapter scripts. <i>portnumber = <port></i>
<i>Domain</i>	Enter the domain name of the Agile™ server used in adapter scripts (usually same as machine as indicated previously). <i>domain = <domain></i>

Settings for the PeopleSoft Adapter Configuration File	
'UserName' and 'Password'	Enter the user name and password to log in to Agile™ server. <i>UserName = <username></i> <i>password = <password></i>
'extractforPS'	Contains the filename of the AIS™ script for extracting ECOs and MCOs. <i>extractforPS = ECO-PS-XTRACT.xml</i>
'updateAgilePSStatus'	Contains the file name of the AIS™ for updating the status in PeopleSoft for ECOs and MCOs. <i>updateAgilePSstatus = ECO-PS-UPDATE.xml</i>
'logfilename'	Contains the Log file name for the PeopleSoft Adapter. <i>logFileName = C:\TEMP\HTTPlog\RunAgileScript.log</i>
'XMLLogDir'	Stores the output XML files and any errored XMLs. Specify a folder on the machine where your adapter resides to store the XML files. The adapter must have write access to this folder! Note. You must create this folder first. Setting example: <i>XMLLogDir = C:\temp\HTTPlog</i>
'newLogFile'	Contains the number of days after which you want the Java™ Scheduler to create a new log file. For example, a setting of five would create a new log file after five days of continuous running of the scheduler. The old running log file would be copied and renamed to <logFileName>.date_time. <i>newLogFile = 1</i>
'interval'	Contains the interval (specified in seconds) for which you want the PeopleSoft Adapter to extract ECO information. For example, set this value to 600 to check for new releases to be sent to PeopleSoft every 10 minutes. If you set this interval to zero while the Java™ Scheduler is running, the PeopleSoft Adapter enters into “sleep” mode, but continues searching this file for changes approximately every 10 seconds. Setting this value to -1 stops the Java™ Scheduler. <i>Interval = 30</i>

Settings for the PeopleSoft Adapter Configuration File	
'maxchangeorders'	Contains the maximum number of change orders to process in a given interval. Important! The setting of this value combined with the interval setting and the frequency of the PeopleSoft Process Scheduler job (PDXJOB) control the total flow of change order information from Agile™ to PeopleSoft. All three must be considered collectively to obtain the proper flow of change orders into PeopleSoft. <i>maxchangeorders = 1</i>
'schedule_XXXX' (multiple values in the configuration file)	Defines the schedule for running the PeopleSoft Adapter (Java™ Scheduler). All times are in military time. For example: 0000_to_2359 equals 12 am (midnight) to 11:59 pm. The format is: schedule_<day>=<start>_to_<end> Example: schedule_monday=0800_to_1800—this means that the Java™ Scheduler runs from 8 am to 6 pm on Monday. schedule_monday=0800_to_2200 schedule_tuesday=0800_to_2200 schedule_wednesday=0800_to_2200 schedule_thursday=0800_to_2200 schedule_friday=0800_to_2200 schedule_saturday=0800_to_2200 schedule_sunday=0800_to_2200 Note. If you do not set a schedule parameter as indicated for a specific day, the scheduler does not run on that day.
'reqnode'	Contains the name of the node making the request to post the PDX XML message. You should leave this value set as <i>AGILE_NODE</i>. <i>reqnode = AGILE_NODE</i>
'destnode'	Contains the PeopleSoft Integration Broker (IB) destination node for the PDX XML message. <i>destnode = <destination_node></i>
'msgname'	Contains the PeopleSoft message name for the PDX XML. You should leave this value set as <i>PDX_MSG</i>. <i>msgname = PDX_MSG</i>

Settings for the PeopleSoft Adapter Configuration File	
'IB-url'	Contains the PeopleSoft Gateway URL to which the PDX XML messages from Agile™ post. <i>IB-url = http://<gateway_server>/PSIGW/HttpListeningConnector</i>
'heapsize'	SimplePost parameter for the maximum size of the input file it can handle (in MB). This value may need to be increased depending on the size of your PDX files generated from Agile (such as the maximum size). For example, a heapsize of 64 processes (post to PeopleSoft) an XML file of approximately 3 MB to 4 MB in size. Note. This also depends on your machine's capacity, memory, and so forth). A heapsize of 128 can process XML files of approximately 8 MB. For example, we have found a PDX with a large change order containing 20 new assemblies and 80 components each (1600 BOM components total) to produce a PDX file size of about 2.8 MB by using the PeopleSoft Adapter. <i>heapsize = 64</i>
'Debug'	This setting enables you to view messages from the PeopleSoft Adapter on the console. This can be helpful if you want to monitor the adapter as it runs. During your initial implementation, leave this value set to <i>ON</i>. <i>Debug = ON</i> Note. Commenting out this value with a # disables additional debug logging.

Running the PeopleSoft and Agile™ Integration

After you have set up the integration between PeopleSoft and Agile™, you should run a test.

This section describes the steps involved in starting and stopping the PeopleSoft Java™ Scheduler portion of the PeopleSoft Adapter. Prior to this, you must have the Agile eHub™ and Agile™ WebLogic servers up and running.

See Your Agile™ documentation.

Starting the PeopleSoft Java™ Scheduler

After you've successfully started the PeopleSoft Java™ Scheduler, you'll see similar output as illustrated here:

```

C:\PS AgileScheduler
Moving log file to C:\TEMP\HTTPlog\RunAgileScript_04102003_144551.log
Rename Return value...: true
Current log: C:\TEMP\HTTPlog\RunAgileScript.log New Log: C:\TEMP\HTTPlog\RunAgileScript_04102003_144551.log
=====
Thu Apr 10 14:45:52 PDT 2003 Processing...
null: HTTP/1.1 200 OK
Date: Thu, 10 Apr 2003 21:45:53 GMT
Server: WebLogic 6.0 Service Pack 2 05/24/2001 11:55:28 #117037
Content-Length: 24
Content-Type: text/plain
Connection: Keep-Alive
Set-Cookie: JSESSIONID=PpXmERwkDNUK3A6t7ea2vpgs10pTAUp2loaW25cFqh0ikY8tIxzX?-1486528225990179513?-1062730041!7001!7002; path=/
https://eantas09:7002/AgileScriptServlet/script, script=@ECO-PS-XTRACT.xml, user name=PS4, password=pass4, maxchangeorders=5, portnumber=9013, domain=eantas09
Thu Apr 10 14:45:55 PDT 2003 Waiting....

```

Example of PS Agile Scheduler output

To start the PeopleSoft Java™ Scheduler:

1. Ensure that you have set all the configuration parameters properly in the configuration file (RunAgileScript.config).
2. Once all the parameters are set, run the command file (PS AgileScheduler.cmd) on the Agile™ server (C:\Agile\AgileOnRamp\classes>PS AgileScheduler).

When the scheduler is running, it also writes entries to the log file defined in the RunAgileScript.config file for each extract interval it runs, (for example RunAgileScript.log filename in the directory that you defined for configuration setting XMLLogDir). General errors pertaining to the Java™ Scheduler and the extract and update process are logged in this file. The adapter starts a new log file and renames the current one according to the newlogfile setting.

As the adapter runs and processes any released change orders in Agile™, each change order has a date and time history of any adapter updates as it extracts change orders. This is seen within Agile™ within the Agile™ change order history as updates to the PeopleSoft-related Page Two Send to PeopleSoft and Page Two Send to PeopleSoft Status fields.

Note. To simplify maintenance of the Java™ Scheduler, you may want to set this process up as an NT service.

The PeopleSoft Adapter requires that only one instance is running against an Agile eHub™ server. The adapter creates a lock file named lock.lock in c:\temp when the adapter starts running. If the lock file exists already, it does not run and displays these messages:

Lockfile exists: c:\temp\lock.lock.

Check to see if another instance of the scheduler is running or the system ended abnormally and left a lock file in the temp directory.

Important! Under normal circumstances, PeopleSoft Process Scheduler deletes the lock file when it receives the signal to stop. If PeopleSoft Process Scheduler crashes abnormally (for example, the system was rebooted unexpectedly or the process was stopped in the Process Monitor), this lock file (c:\temp\lock.lock) must be deleted manually before PeopleSoft Process Scheduler can be restarted.

How to Stop the PeopleSoft Adapter

To shut down the PeopleSoft Adapter cleanly:

1. Set the interval parameter to -1 in the configuration file (RunAgileScript.config).
2. Save the configuration file.

This signals to PeopleSoft Process Scheduler that you want to stop it, and it stops the process when it reads the configuration file. It also deletes the lock.lock file.

Note. You can also shut down the PeopleSoft Adapter by activating the DOS window for it (on your console) and by pressing Ctrl+C (break key). The program attempts to end cleanly and asks whether you want to terminate the batch job. Select Y to terminate the adapter.

Reviewing and Correcting Change Order Exceptions

This section discusses:

- How to review and correct any change order error exceptions after you have successfully started the PeopleSoft Adapter, and the change order information has been properly received by your PeopleSoft 8.8 Manufacturing system.
- How to define an email alert, which notifies you of load-time processing exceptions related to change orders for items and BOMs.

Overview of Change Order Exceptions from Agile™

While the intent is obviously to not have any exceptions, the PDX Change Order Exceptions component is provided to identify and correct any errors that may occur.

This outlines the flow of change order information once it is received into the PeopleSoft 8.8 Manufacturing system:

1. Messages are posted from Agile™ to the PeopleSoft message gateway (PDX_MSG), which contains the PDX change order data.
The PDX message is processed. It is translated and subscribed to as item sync and BOM sync messages.
2. Item sync and BOM sync subscriptions write results to new entries by Pub ID (which relate to the PDX change data) within Data Maintenance as item for items and revisions, and BOM for bill of material changes.
3. The Daemon defined for the PeopleSoft Process Scheduler determines when to run the PDXJOB defined in “Steps to define and PDX Daemon.”
The PDXJOB selects and processes the change order package (by Pub ID). This job processes the earliest transactions in the system (FIFO by Pub ID) by running the Item Loader and BOM Loader processes in PeopleSoft together sequentially.
4. Any exceptions processing the PDXJOB are visible within the PDX Change Order Exceptions component defined in this section.

Note. This component provides a special view of the item and BOM data maintenance information in the context of Agile™ ECO numbers containing Revision information. If the PDX sent from Agile™ contains manufacturing change orders (such as MCOs that have no revision information), these changes are consolidated into a single line within the exception page with the value '***MCO***' if in error. The generic value '***MCO***' is configurable in the Message Catalog utility under message set number 7026 and message number 204.

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Viewing Change Order Exceptions, page 122

Pages Used to Review and Correct PDX Change Order Exceptions

Page Name	Object Name	Navigation	Usage
PDX Change Order Exceptions	EN_PDXECO_EXCP	Data Exchanges, Transaction Error Handling, PDX Change Order Exceptions	Review any incoming change orders that are the result in an error status due to edit checks made on items, revisions, or BOMs.
PDX Change Order Exceptions - Error Detail	EN_PDX_ERRORS	Click the Error Detail link on the PDX Change Order Exceptions page.	View the specific errors associated with the change order.
Completed by Change Order	EN_PDX_COMPTRNS	Click the Completed link on the PDX Change Order Exceptions page.	View the completed change orders.
Role Definition	ROLEDEFN	PeopleTools, Permissions and Roles, Roles	Define a role for Agile™ users.
PDX Alerts	EN_PDX_ALERT_RUN	Data Exchanges, Transaction Error Handling, PDX Alerts	Define PDX alert emails, which notify you of load time processing exceptions related to change orders for items and BOMs.

Viewing Change Order Exceptions

Access the PDX Change Order Exceptions page.

PDX Change Order Exceptions

Date Transferred: 10/28/2003 thru 10/29/2003

Change Order:

Status:

The Completed link shows any revision successfully processed into PeopleSoft.

Staged Change Orders						
Change Order	Date Transferred	Status	Publication Id	Error Detail	Completed	Cancel
RML-MCOTEST	10/29/2003 9:22:25PM	Error	19	Error Detail		Cancel
RML-MCO0825-01	10/29/2003 9:22:25PM	Error	19	Error Detail		Cancel
*** MCO ***	10/29/2003 9:22:25PM	Error	19	Error Detail		Cancel
RML-ECO0825-01	10/29/2003 9:21:45PM	Error	18	Error Detail	Completed	Cancel

[Process Monitor](#) [Message Monitor](#) [Maintain Data Definitions](#) [View Completed Revisions](#)

PDX Change Order Exceptions page

This page provides you visibility of incoming staged items and BOMs within the context of Agile™ change orders only. This page is a view of the information by item or BOM in the Data Maintenance component.

Status

Values include:

- *Cancelled*
- *Error found on the transaction*
- *In Process*
- *New Transaction*

When new change orders are being processed, the initial status of each change order appears as New.

Note. The details of a change order can include several item and BOM changes that are present in the Maintain Data Definitions component for an initial status of New.

If any of the items, revisions, or BOMs related to a change order are processed in error, then the change order will be identified as an *Error* on this page.

Error Detail

Click this link to view the specific errors associated with the change order.

Because a change order typically contains multiple items and BOMs, it is possible that some changes were processed successfully while others may have resulted in an error.

For example, a new assembly, BOM A123, is sent with four new component items (C1, C2, C3, C4), but one of the new components (C4) was not sent from Agile™. In this case, three of the components could be successfully processed (C1, C2, C3) as items, but the BOM A123 would fail, because component C4 must exist within PeopleSoft before the manufacturing BOM can be created.

If this occurs, the Completed status link appears for that specific change order.

Completed

Click this link to view any completed items or BOMs for an error change order. These items have been processed and incorporated into your PeopleSoft 8.8 Manufacturing system.

Viewing PDX Change Order Exceptions Error Details

Access the PDX Change Order Exceptions - Error Detail page.

Error Detail

Change Order:RML-MCOTEST

Date Transferred:10/29/03 9:22:25PM

Publication Identifier:19

Item Errors

CustomizeFindView All

First1 of 1Last

	Item ID	Field Name	Message Text	EIP Control ID
1	No Errors Found.			

BOM Errors

CustomizeFindView All

First1 of 1Last

	Item ID	Component ID	Message Text	EIP Control ID
1	RML-P0829-01	RML-P0829-02	Effectivity Date must align with Revision when Item ID is Revision Controlled.	40000000000000231000000002

Return to PDX Exceptions

Maintain Data DefinitionsDefine ItemsBusiness Unit ItemRevisionReview Manufacturing BOMs

Change Order Exceptions - Error Detail page

Viewing Completed Change Order Exception Errors

Access the Completed by Change Order page.

Completed by Change Order

Change Order:

Customize Find View All First 1-13 of 13 Last				
Business Unit	Item ID	Revision	Effective Date	View BOM
US008	0327-ASSY1	B	03/27/2003	View BOM
US008	0327-COMP1	A	03/27/2003	
US008	0327-PART-L2-1	A	03/27/2003	
US008	0327-PART-L3	A	03/27/2003	
US008	0327-PART10	A	03/27/2003	View BOM
US008	0327-PART2	A	03/27/2003	
US008	0327-PART3	A	03/27/2003	
US008	0327-PART4	A	03/27/2003	
US008	0327-PART5	A	03/27/2003	
US008	0327-PART6	A	03/27/2003	
US008	0327-PART7	A	03/27/2003	
US008	0327-PART8	A	03/27/2003	
US008	0327-PART9	A	03/27/2003	

[Return to PDX Exceptions](#)

[Business Unit Item Definition](#)
[Item Definition](#)
[Revision](#)
[Review Manufacturing BOMs](#)

Completed by Change Order page

This page identifies completed items based solely on the presence of new entries in the item, revision, and BOM production tables within PeopleSoft. This is identified in the system by storing the Agile™ change order number within the Revision and BOM additional text fields, which are populated by the PeopleSoft Adapter.

Correcting Change Order Errors

It is highly recommended that when there is a BOM processing (data entry) error on the Agile™ side or general adapter errors (but not including engineering markup changes), the error should be corrected within Agile™ and the change order resent from Agile™ to PeopleSoft. In this case, click the Cancel button on the PDX Change Order Exceptions page to cancel all remaining unprocessed and errored entries in the ITEM and BOM staged tables and then resend the entire change order from Agile™.

Note. Cancel the change order first in PeopleSoft so that subsequent sends from Agile™ of the same change order are not confused with the earlier send, which had an error.

For example, you send two new component items (C1 and C2) and one assembly item (A123), along with one BOM markup for the assembly item A123. It is possible that the two component items process correctly yet the BOM markup fails (for example, a third component (C3) is referenced on BOM A123, but is missing). In this case, canceling the errored change order rows, repairing the change order in Agile™ by adding the third component, and resending the change order to PeopleSoft is a preferred method of correction.

Data Entry Errors

BOM error Missing required component item in the affected items of the change order in Agile™ caused the BOM to fail because the component item was not present in PeopleSoft.

Item Error

- Missing required PeopleSoft data on items (such as the item description left blank).
- Life cycle status left blank in affected items on the change order.

Engineering Errors to Released and Sent Change Orders

There is no “undo” capability for change orders applied to PeopleSoft. Therefore, you should not make any engineering-type changes to a change order (such as BOM markups) after it has already been sent and processed successfully within PeopleSoft. For example, successfully sending a markup to PeopleSoft and then subsequently unreleasing the Agile™ change order, changing the markup, and resending the same change order to PeopleSoft is not allowed. Doing so causes PeopleSoft and Agile™ to be out of sync.

Note. If additional engineering changes are required to repair a change order, a subsequent change order and release to PeopleSoft is the proper method of correction.

Change Order Errors - Examples

These are some common change order errors that you may encounter:

- A component listed on the BOM was mistakenly left off the change order that was corrected within Agile™, and then the change order was resent from Agile™ to PeopleSoft.

In this case, click the Cancel button on the PDX Change Order Exceptions page to cancel all remaining unprocessed and error entries in the item and BOM staged tables and resend the change order.

- You sent two new component items (C1 and C2) and one assembly item (A1), along with one BOM markup for the assembly item A1.

It is possible that the two component items processed correctly, but the BOM markup failed (perhaps a third component, C3, is referenced on BOM A1 but is missing).

In this case, canceling the change order rows with an Error status, repairing the change order in Agile™ by adding the third component, and resending the change order to PeopleSoft is a preferred method of correction.

Reviewing Important Implementer and End-User Guidelines

When integrating two software systems, it is very important to understand and work with the differences of the two systems to maximize your integration success. This is most notably due to subtle functional differences between the two systems.

Here are some important guidelines to help with your integration:

- Determine transaction size and volume.

The typical size and volume of your change orders determines how often and how much to process through the PeopleSoft Adapter. There are two configuration file settings which control the transaction size and volume of your change orders:

- Interval: This (adapter) value determines how often to run the script.
- maxchangeorders (maximum number of change orders): This value determines how many change orders are to be included in each message.

- Make adjustments to these values depending on Agile™ use.

However, set the maxchangeorders value to 1 within the configuration file and the interval value frequently enough to handle the hourly volume. This ensures that one PDX file (one pub ID in PeopleSoft) is sent to PeopleSoft per change order. This also ensures that an affected item, revision, and assembly is included in the package only once. The benefits of this are smaller messaging packets to PeopleSoft which are guaranteed to be unique with regard to duplicate affected items.

Limiting your maxchangeorders value can be important, because the PeopleSoft back end processor does not process multiple occurrences of the same item (such as an affected item from Agile™) *simultaneously*. If you rarely have this occurrence of duplicate items within a series of ready to be released or sent change orders, then it is possible to increase the maximum number of change orders with greater processing success.

Here are some suggested initial settings:

1. Set the interval value within the configuration file, so that it processes frequently enough to maintain your typical change order release volume.

For example, if you typically have 6 to 10 change orders released each hour and your maxchangeorders value is set to 1, then you want the interval to be at least every 6 minutes (defined as 360 seconds), which picks up a maximum of 10 change orders per hour.

Note. To process changes as quickly as possible, you may want to reduce the interval independent of volume. For example, you may have 6 to 10 change orders per hour, but you want to check every minute (60 seconds) for changes.

2. Schedule your PDX Daemon (PDXDMON) within PeopleSoft to compliment your typical flow of change orders being sent.

For example, if you typically have 6 to 10 change orders released each hour (interval), you should schedule your PDXDMON to look for new change orders more frequently (such as wake up perhaps every 5 minutes so a maximum of 20 change orders per hour could be processed). Again, if you want to process changes more quickly, you can schedule the Daemon to look more frequently for new packages.

- Set change order status to Implemented.

You should not change the Agile™ workflow status to Implemented if PeopleSoft has not successfully and completely processed the change order. Once the change order has been moved to the Implemented status, the adapter no longer initiates sending it to PeopleSoft. The adapter does not look at Yes or On-Release for Implemented change orders.

- Create new and modify manufacturer parts and preferred status in Agile™.

Important! PeopleSoft supports only a single preferred (default) manufacturer part per internal item number, while Agile™ supports the designation of multiple preferred manufacture parts for an Item. You must not identify more than one Agile™ manufacturer part number with a status of Preferred. If you do, the posting of any changes to this item causes a failure during validation within PeopleSoft.

- Resend change orders from Agile™.

Once a change order is sent to PeopleSoft, the Send to PeopleSoft value is reset to blank by the adapter, and the Send to PeopleSoft Status field is updated with the *Send* status. To resend a change order to PeopleSoft, reset the Send to PeopleSoft value back to *Yes* to be reprocessed by the adapter. This should only be done for change orders in Released or prior status (not implemented).

Note. When the Send to PeopleSoft value is set back to *Yes*, the Send to PeopleSoft Status value is not reset automatically. This has no impact on your resending a change as this status field is overwritten in each process.

- Avoid the *redo and resend markup* pitfall.

Once a change order has been processed and sent to PeopleSoft, it is highly recommended that you never back out and unrelease a change order in Agile™, change the BOM markup data, and then resend it to PeopleSoft. This will frequently cause unpredictable integration errors and BOM synchronization problems, because PeopleSoft has already successfully processed each of the original released markups for the initial change order.

Note. The PeopleSoft Adapter cannot interpret the change against the existing production BOM in PeopleSoft. To make changes to the existing production BOM in PeopleSoft, manually change your PeopleSoft BOM to get it in sync with the latest released revision in Agile™, and proceed from there.

- Define field lengths and required fields in Agile™.

This is critical to the reliability of the integration to ensure that all PeopleSoft required fields in Agile™ (such as Page Two and other fields) have valid values, and that these values have the correct lengths for PeopleSoft. If they do not, transaction errors occur on the back end (PeopleSoft side) of the integration.

- Use caution regarding processing multiple revisions for an item in one day.

The PeopleSoft 8.8 Manufacturing revision scheme supports only one revision per day. Some Agile™ environments may require that multiple revisions be released for the same item in one day. If this occurs in your environment, note that by default only the latest revision number can be tracked within PeopleSoft for that day. Furthermore, all the revision changes for a BOM are combined with the latest revision for the day. For example:

- Revision A on 6/1/2003, 9 am: Adds component XYZ-1 to BOM 123
- Revision B on 6/1/2003, 10 am: Adds component XYZ-2 to BOM 123

- Revision C on 6/1/2003, 1 pm: Adds component XYZ-3 to BOM 123

Within PeopleSoft 8.8 Manufacturing, the net effect is revision C showing XYZ-1, XYZ-2, and XYZ-3 added for BOM 123 under revision C.

If a prior revision (such as revision A or B in the previous example) has already been used within production (on a production ID or production schedule) and a new revision for the same item and effective date is sent from Agile™, the change order will error out within PeopleSoft (PDX Change Order Exceptions page) as seen in this screenshot. This occurs because when you send multiple revisions during one day, you are overwriting an original revision, for example, the production ID would be left tagged with a revision that no longer exists in the system.

EIP Control ID: 40000000000002200000000001		Item ID: LLH-0328-ASSYA
Errors Customize Find View All		
Field Name	Message Text	Record Description
 REVISION	Revision A for item LLH-0328-ASSYA currently exists in production.	Item Revisions

Change order error in PeopleSoft due to multiple revisions during one day

- Send multiple revisions each day in an environment where you can anticipate that this is not a problem, because you normally want to pick up the latest revision for existing production IDs created on that day.
In this case, use these PDX exceptions as an alert that the production IDs must be unreleased (blank revision) and allow the newest revision to be assigned to the production ID once the revision is sent to PeopleSoft.
- Consider a few pertinent Agile™ ‘Smart Rules.’

The Agile™ Smart rules have significant impact on the integration between PeopleSoft and Agile Product Collaboration™:

1. Duplicate Item Numbers in BOM - Recommend (Disallow) in Agile™.

Duplicates are allowed in PeopleSoft, but only by unique BOM operation sequence (routing sequence). Generally you want to avoid duplicate component item numbers on the BOM for use with PeopleSoft. However, if this is required and acceptable to use an operation sequence to make the BOM component unique, you can do so by adding a Page Two value for the BOM component in Agile™ and mapping it on the PeopleSoft Installation Options - Manufacturing page.

Note. Using operation sequences on the BOM component implies that the material is to be issued to that step (operation sequence) in the manufacturing process (routing). If the value specified for the operation sequence is not valid for the routing (or the routing does not exist), the material is issued to the first step during production.

2. Items Released First - Recommend (Disallow) in Agile™.

Component items must be released to PeopleSoft prior to or with the BOM being released and sent to PeopleSoft. If you send BOMs that reference components that have not been released, sent, and processed in PeopleSoft, the Agile™ BOM message always fails in PeopleSoft and appears in the PDX Change Order Exceptions component.

3. ReleasedRevRequired - Recommend (Disallow) in Agile™.

This value controls if an item revision can be unreleased, even if it is released in a subsequent change. Unreleasing a revision in Agile™ will never back out the revision or BOM component changes once they have been sent to PeopleSoft and processed successfully.

4. `UnreleaseChangeOrder` and `UnreleaseManufacturingOrder` - Recommend use with caution in Agile™.

These settings allow you to unrelease a change order within Agile™. If the released change was never sent to PeopleSoft, then unreleasing and re-releasing the change order poses no problem. If the change was already sent and processed successfully in PeopleSoft and has some minor data correction changes (a missed a component in the affected items list) that are not engineering related, (for example, never a change to markup), the change can be resent.

See Also

Avoiding the ‘redo and resend Markup’ pitfall

[Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\).” Setting Up Agile Product Collaboration™ for Use with PeopleSoft 8.8 Manufacturing, page 73](#)

Troubleshooting the Agile™ Integration

This section provides some helpful hints regarding the general troubleshooting of the Agile™ integration. You may find this information useful especially when initially implementing this integration. This section discusses:

- Possible errors in the PeopleSoft Adapter scripts.
- Possible errors with processing Agile™ information within PeopleSoft.

Possible Errors in the PeopleSoft Adapter Scripts

When the PeopleSoft Adapter is running, a log is written to the disk on the Agile™ server, and this log contains information for each iteration of the extraction and updating of Agile™ information. This file is named `RunAgileScript.log` and is stored in a temporary directory that you specify in the PeopleSoft Adapter configuration file. This is an example of the output from the log file:

```

Thu Apr 03 09:32:30 PST 2003 waiting for data from Agile...
Thu Apr 03 09:33:32 PST 2003 waiting for data from Agile...
Thu Apr 03 09:34:34 PST 2003 waiting for data from Agile...
Thu Apr 03 09:35:35 PST 2003 waiting for data from Agile...
Thu Apr 03 09:36:37 PST 2003 waiting for data from Agile...
https://adnttp26:7002/AgileScriptServlet/script, script=@ECO-PS-XTRACT.xml, username=psscheduler, password=pass, maxchangeord
Extract Script Response: pdxFileName = C:\WINNT\TEMP\tango24248.tmp
PDXResponse C:\temp\HTTPlog\tango24248.xml
Thu Apr 03 09:36:40 PST 2003 Posting pdxFileName C:\WINNT\TEMP\tango24248 to PeopleSoft
PS Post Response: <?xml version="1.0"?><IBResponse type = "success"><DefaultTitle>Integration Broker Response</DefaultTitle><
Thu Apr 03 09:36:42 PST 2003 Posted pdxFileName C:\WINNT\TEMP\tango24248
https://adnttp26:7002/AgileScriptServlet/script, script=@ECO-PS-UPDATE.xml, username=psscheduler, password=pass, action=good,
Update Script Response: good - OK
Thu Apr 03 09:37:43 PST 2003 waiting for data from Agile...
Thu Apr 03 09:38:45 PST 2003 waiting for data from Agile...
Thu Apr 03 09:39:46 PST 2003 waiting for data from Agile...
Thu Apr 03 09:40:48 PST 2003 waiting for data from Agile...
Thu Apr 03 09:41:49 PST 2003 waiting for data from Agile...
Thu Apr 03 09:42:51 PST 2003 waiting for data from Agile...
Thu Apr 03 09:43:53 PST 2003 waiting for data from Agile...
Thu Apr 03 09:44:54 PST 2003 waiting for data from Agile...
Thu Apr 03 09:45:56 PST 2003 waiting for data from Agile...
Thu Apr 03 09:46:57 PST 2003 waiting for data from Agile...
Thu Apr 03 09:47:59 PST 2003 waiting for data from Agile...
Thu Apr 03 09:49:00 PST 2003 waiting for data from Agile...
Thu Apr 03 09:50:02 PST 2003 waiting for data from Agile...
Thu Apr 03 09:51:03 PST 2003 waiting for data from Agile...
https://adnttp26:7002/AgileScriptServlet/script, script=@ECO-PS-XTRACT.xml, username=psscheduler, password=pass, maxchangeord
Extract Script Response: pdxFileName = C:\WINNT\TEMP\tango24266.tmp
PDXResponse C:\temp\HTTPlog\tango24266.xml
Thu Apr 03 09:51:09 PST 2003 Posting pdxFileName C:\WINNT\TEMP\tango24266 to PeopleSoft
PS Post Response: <?xml version="1.0"?><IBResponse type = "success"><DefaultTitle>Integration Broker Response</DefaultTitle><
Thu Apr 03 09:51:11 PST 2003 Posted pdxFileName C:\WINNT\TEMP\tango24266
https://adnttp26:7002/AgileScriptServlet/script, script=@ECO-PS-UPDATE.xml, username=psscheduler, password=pass, action=good,
Update Script Response: good - OK
Thu Apr 03 09:52:13 PST 2003 waiting for data from Agile...
Thu Apr 03 09:53:14 PST 2003 waiting for data from Agile...
Thu Apr 03 09:54:16 PST 2003 waiting for data from Agile...
Thu Apr 03 09:55:18 PST 2003 waiting for data from Agile...

```

Example of a PeopleSoft Adapter script log (RunAgileScript.log)

Possible Errors that Appear in the RunAgileScript.log File

These are possible errors that you may view in the RunAgileScript.log file:

- ‘insufficient privilege’ for setcell value.

This typically means that the login user in the configuration file does not have privileges to update released change order user-defined PeopleSoft fields, (such as Send to PeopleSoft). The security for this must be set up within Agile Administrator™. Set the role values for Modify Engineering Changes and Modify Released Eng. Changes AppliedTo attributes to include *all* Page Two attributes that you have used for these three PeopleSoft fields.

See [Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ \(Version 8.0 or 8.5\),” Overview of Required Setup and Considerations for Integration, page 68.](#)

- Destination node does not match the local node.

This error typically means that the node defined in the configuration file is not set up in your PeopleSoft database.

```

506</MessageID><DefaultMessage>Destination node does not match the local node.<
/DefaultMessage><MessageParameters></MessageParameters></IBResponse>

```

Check your configuration file to make sure the PeopleSoft nodes are set up correctly relative to the nodes defined in your PeopleSoft database.

- PDX File Errors.

This error indicates that the extraction from Agile™ has not been successful. There can be a variety of reasons why the RunAgileScript.log file contains errors listed as PDX File Error including:

- The Page Two fields have not been set up correctly to extract data from Agile™, and this caused extract or update script errors, because it cannot find the field or values for the Page Two fields required for the adapter

See Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Setting Up Agile Product Collaboration™ for Use with PeopleSoft 8.8 Manufacturing, page 73.

- The standard configuration and classes in Agile™ for ECOs and MCOs are not being used within Agile™, and modifications to the PeopleSoft extract and update scripts have not been made to take this into consideration.
- The *exceeded the number of Agile™ user licenses* error occurs when the log file indicates a general signon issue to Agile™ (from the script) that you have exceeded the number of Agile™ licenses.
- A modification made to the script is causing an unknown error.
- Other problems on the Agile™ setup side can cause errors, such as a web server error. For example, running out of memory on the Agile™ web server (or other errors with the web server), can result in a response written to the log file as follows:

Thu Apr 03 15:36:43 PST 2003 Waiting for data from Agile..

PDX File Error

https://adnttp26:7002/AgileScriptServlet/script, script=@ECO-PS-UPDATE.xml, username=psscheduler, password=pass, action=error, portnumber=9013, domain=adnttp26

Update Script Response: <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Draft//EN">

Update Script Response: <HTML>

Update Script Response: <HEAD>

Update Script Response: <TITLE>Error 500--Internal Server Error</TITLE>

Update Script Response: <META NAME="GENERATOR" CONTENT="WebLogic htmlKona 6.0 Service Pack 2 05/24/2001 11:55:28 #117037">

- Error posting the XML messages to PeopleSoft: java.lang.OutOfMemory.

This error can indicate that the XML file being posted to PeopleSoft is too large. This can be alleviated by increasing the JVM Heap Size value in two locations: (1) heapsize in the Agile™ configuration file, and (2) in the WebLogic setenv.cmd file.

- Error failing to post the XML messages to PeopleSoft.

This error occurs when postings are made to PeopleSoft and the XML message fails if there are problems with the PeopleSoft gateway. When this occurs, the related ECOs or MCOs being pulled by the scheduler are set to a Send to PeopleSoft Status of *Error* (Sent Manually or In Process) after the adapter attempts to send the data three times. If this occurs, you must resolve the issue with your PeopleSoft gateway. In the RunAgileScript.log file, an error is stored indicating the response sent from the PeopleSoft gateway. For example:

Mon Apr 07 11:01:03 PDT 2003 Posting pdxFileName C:\Temp\tango18319 to PeopleSoft

PS Post Response: <?xml version="1.0"?><IBResponse type="error"><DefaultTitle>Integration BrokerResponse</DefaultTitle><StatusCode>10</StatusCode><MessageID>10732</MessageID><DefaultMessage>null</DefaultMessage></IBResponse>

Mon Apr 07 11:01:10 PDT 2003 Error in Posting pdxFileName C:\Temp\tango18319
https://eantas09:7002/AgileScriptServlet/script, script=@ECO-PS-UPDATE.xml, username=PS4,
password=pass4, action=error, portnumber=9013, domain=eantas09
Update Script Response: error - OK
Mon Apr 07 11:01:11 PDT 2003 PDX backed up to C:\temp\HTTPlog\tango18319.PDXerror.xml
Mon Apr 07 11:01:32 PDT 2003 Waiting for data from Agile..

Other PeopleSoft Gateway Errors

These are some other examples of errors that you may receive relating to the PeopleSoft gateway. These types of errors are associated with your PeopleSoft Integration Broker and gateway setup rather than being specific to the PeopleSoft Adapter.

- 10201 - Integration Gateway - General Error.
- 10202 - Integration Gateway - No Connector with Specified Name.
- 10203 - Integration Gateway - Unable to Instantiate Connector.
- 10204 - Integration Gateway - No Service with Specified Name.
- 10205 - Integration Gateway - Unable to Instantiate Service.
- 10206 - The Integration Gateway properties file could not be read.
- 10207 - Could not read the following property from the Integration Gateway Properties file.
- 10208 - Could not access the following Directory from the Integration Gateway file System: %1.
- 10209 - Unable to decrypt the password.
- 10732 - PeopleSoftTargetConnector - The application server is down.
- 10733 - Can't access System Properties: %1 - Check the configuration of your integration properties file.
- 10734 - PeopleSoftTargetConnector - : username (%1) and password (%2) incorrect.

See Message set 158 under PeopleTools/utilities/administration/Message catalog.

See PeopleSoft Data Management PeopleBook, PeopleTools Utilities, Administration Utilities, Message Catalog.

Example of Normal Processing of PS AgileScript.log When the Extraction and Updates are Done Properly

This example illustrates normal processing of the PS AgileScript.log:

Fri Apr 04 17:39:51 PST 2003 Waiting for data from Agile..
Fri Apr 04 17:40:52 PST 2003 Waiting for data from Agile..
https://adnttp26:7002/AgileScriptServlet/script, script=@ECO-PS-XTRACT.xml, username=psscheduler,
password=pass, maxchangeorders=98, portnumber=9013, domain=adnttp26
Extract Script Response: pdxFileName = C:\WINNT\TEMP\tango26091.tmp
PDXResponse C:\temp\HTTPlog\tango26091.xml

Fri Apr 04 17:40:56 PST 2003 Posting pdxFileName C:\WINNT\TEMP\tango26091 to PeopleSoft

PS Post Response: <?xml version="1.0"?><IBResponse type = "success"><DefaultTitle>Integration Broker Response</DefaultTitle><StatusCode>0</StatusCode><TransactionID>AGILE_NODE.PDX.98</TransactionID></IBResponse>

Fri Apr 04 17:40:58 PST 2003 Posted pdxFileName C:\WINNT\TEMP\tango26091

https://adnttp26:7002/AgileScriptServlet/script, script=@ ECO-PS-UPDATE.xml,username=psscheduler, password=pass, action=good, portnumber=9013, domain=adnttp26

Update Script Response: good - OK

Fri Apr 04 17:41:59 PST 2003 Waiting for data from Agile..

See Also

PeopleSoft PeopleTools PeopleBook: Internet Technology

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Setting Up the Configuration File for the PeopleSoft Adapter, page 115

PeopleSoft PeopleTools PeopleBook: Integration Broker

Possible Errors with Processing Agile™ Information in PeopleSoft

These are possible errors that may occur when processing Agile™ information in PeopleSoft:

- Change orders are sent from Agile™ to PeopleSoft correctly (based on the Send to PeopleSoft Status value); however, change orders are not present in PeopleSoft.

When change order errors do not appear on the PDX Change Order Exceptions page and the new revision and BOM changes are not present within PeopleSoft, it is a general indication that the inbound message (Pub ID) has not been processed. This can be caused due to:

- The message stops processing through PeopleSoft Integration Broker or message stuck in New status (inbound XML).

This scenario arises when an error occurs within an unrelated inbound message during processing within PeopleSoft Integration Broker. (If any message errors out within the channel, none of the remaining messages process until the error message is resolved. This can be seen in the Message Monitor.) To correct this error, clear out the error messages (such as cancel them) for subsequent messages to be processed.

- The message never completes processing within PeopleSoft Integration Broker due to other errors.

If PeopleSoft Integration Broker is not processing messages for reasons other than an error message (for example, the PDX Channel is paused or the domain is inactive), this causes any inbound change order messages from Agile™ to sit in the queue as well.

- Getting invalid item status errors in PeopleSoft (future or current).

The item error occurs on the ITM_STATUS_FUTURE field with a message text value of *Invalid*. This can be caused by a life cycle mapping that has been defined and used in Agile™ but has not been mapped on the PeopleSoft Installation Options - Manufacturing page (for example, no mapping to Active, Obsolete, or Hold). To correct this error, review the life cycle status being sent for the affected item on the Agile™ change order, and make sure that there is a valid mapping for it on the PeopleSoft Installation Options - Manufacturing page.

- Errors regarding item category or cost group.

Generally these item-specific errors indicate that the specific list value being maintained and passed from Agile™ (such as item category ALLITEMS) does not exist within PeopleSoft (or it exists, but not for the item set ID associated with the business unit defined in the Installation Options - Manufacturing page for Agile™.)

- Errors regarding manufacturer parts and preferred and default status.

It is important to note that PeopleSoft supports only one preferred manufacturer part per internal item number, while Agile™ supports multiple manufacturers. It is important for end users to avoid identifying more than one Agile™ manufacturer part number with a status of preferred. Doing so, causes the posting of any changes to this item to fail validation within PeopleSoft.

- On the PDX Change Order Exceptions page, a message for an item change appears incorrectly as an *add*.

Under normal circumstances, this error should not occur. However, if two item messages are sent simultaneously (for the first time) and the intention is an add followed by a change (respectively), the timing can be too fast and both messages appear as an add on the exceptions page. This occurs because the second change order is processed too quickly, and the (PeopleSoft) update status has been set to *Add*, because the first item has not yet been processed. To minimize the possibility of this occurring, use one of these options:

- Set the Daemon frequency to process the incoming message queue regularly.
- Spread out the timing when two ECOs impact the same item in Agile™.

Normally, a warning is issued in Agile™ when there are two change orders open for the same item.

- Sort order issues with change order processing.

The adapter pulls and processes released change orders using FIFO, sorted by ECO number. This sort order cannot be controlled by using Agile™ scripting because there is no ordering of results by date and time.

If you have issues with a change order processing in an incorrect order (for example, the assembly is sent to PeopleSoft prior to its components within two change orders in the same PDX file), the workaround is to *manually* send each change order from Agile™ to PeopleSoft in the correct sequence.

- Duplicate item error on PDX Change Order Exceptions page.

This is normally caused by a single extract containing two change orders impacting the same item. Currently, the Item and BOM Loader processes handle sets of items, but they must be unique within the set being processed. The PeopleSoft Adapter Daemon and PDXJOB are designed to process a complete PDX file containing all items and BOMs as extracted from Agile™.

Here are some options to prevent this error:

1. Set the maxchangeorders value to a smaller number (for example, down to 1) in the PeopleSoft Adapter configuration file (psagilescrip.config).

By changing this value to a lower number, it is less likely that duplicate items will be contained in each message (PDX file) sent to PeopleSoft.

2. Control the sending of change orders in a sequence that reduces the chances of multiple items in the same PDX file.

Note. One change order can contain an item only once within Agile™.

- 'No Success' in the Process Monitor for PDXJOB.

The PDXJOB is designed to identify existing occurrences of Agile™ jobs in PeopleSoft Process Scheduler. If a prior job is still running, the PDXJOB terminates itself. This is normal processing, and the next time the Daemon polls for new pub IDs to process, it starts another occurrence of the PDXJOB, as needed.

- BOMs components out of sync between Agile™ and PeopleSoft.

It is possible that your PeopleSoft BOMs are out of sync with Agile™. Here are some guidelines so that this error does not occur:

- Do not modify the PeopleSoft BOM directly.

This can definitely cause Agile™ and PeopleSoft BOMs to be out of sync. Agile™ should be the master BOM, and you should never modify the PeopleSoft BOM directly (such as add or change components) unless you are correcting it to make it in sync with Agile™.

- Do not modify a markup after it has been sent and processed in PeopleSoft.

For example, you add a component to a BOM, unrelease the BOM, change the markup to delete the component, and then resend it to PeopleSoft. This causes the new component to remain on the BOM, because there is no “undoing” of markups and multiple sends to PeopleSoft.

The general approach to get BOMs back in sync is to change the PeopleSoft BOM manually to the latest released revision in Agile™ and process as normal.

- PDXJOB with ‘no success’.

This could be caused by a failure in the Item Loader process. If the IN_ITMLOAD process continues to fail or is unsuccessful, then this message appears in the message log and the process becomes suspended.

To correct this error, find the process instance (in the page shot, Instance 31946) and review the log file to investigate the problem that occurred with that process. If possible, you should restart that particular job (process) to let it finish normally. Subsequent processes resume and are no longer suspended by the Item Loader process.

Configuring the PeopleSoft Adapter

After you have performed the procedures in “Setting Up for Agile Product Collaboration 8.0 and 8.5 for Use with PeopleSoft 8.8 Manufacturing,” “Setting Up PeopleSoft 8.8 Manufacturing for Use with Agile Product Collaboration™,” and “Installing the PeopleSoft Adapter in the Agile™ Environment,” it is very likely that your particular installation requires some additional configurations to meet your integration requirements.

The PeopleSoft Adapter consists of these components, which are all delivered by PeopleSoft. While this section is not intended to be used as a configuration guide for the PeopleSoft Adapter, it serves to highlight the areas of the adapter that are more likely to need modification for your environment:

- The Java™ Scheduler.

This reads the PSAGileScript.config file which you need to modify for the adapter to run properly. It runs the extraction and updating of information within Agile™, and posts the resulting PDX messages to PeopleSoft.

Do *not* modify the Java™ Scheduler, if possible. Several configuration options are provided for you in the PSAGILESCRIPT.CONFIG file for this reason.

- The PeopleSoft Extract and Update Agile™ Scripts (ECO-PS-EXTRACT.XML and ECO-PS-UPDATE.XML).

These scripts read Agile™ change order information (ECO and MCO), produce the XML message, and update PeopleSoft Page Two required fields within Agile™.

- The ECO-PS-EXTRACT.XML and ECO-PS-UPDATE.XML scripts are designed to extract only the change order subclasses of ECO and MCO.

All required information for PeopleSoft item, revision, and BOM updates are included with the extraction of these subclasses and formatted according to PDX version 1.0 standards.

Note. Page Two user-defined Agile™ field information related to subclasses is also included in the PDX files generated and is sent to PeopleSoft. Therefore, any additional Page Two fields you add to ECOs, MCOs, items, and so forth may already be present in the XML message sent to PeopleSoft, so you can apply additional XSLT translation rules to them.

- You need to modify both of these files to prevent extracting one of these change types (such as MCOs) or to select a custom subclass that your company may require (for example, you have defined ECN to be used instead of ECO, or you may have other additional subclasses that need to be extracted).
- The ECO-PS-EXTRACT.XML script has some general information regarding where you may need to modify. However, a solid understanding of Agile™ AIS scripting is required, including how to test and debug the script outside of the PeopleSoft Adapter. Expertise with the Agile Integration Server™ may also be required.
- The XSLT programs within PeopleSoft.

These programs translate the inbound PDX file sent from Agile™ XML (PDX 1.0) into ITEM_SYNC and BOM_SYNC messages for processing within the PeopleSoft 8.8 Manufacturing system. Solid expertise with PeopleSoft Integration Broker and XSLT processing is required to modify these programs. This information is provided for reference only and is not intended to explain how to perform specific modifications.

- Two transformation (XSLT) programs are used to translate PDX 1.0 files from Agile™ into PeopleSoft-required ITEM_SYNC and BOM_SYNC messages.

These XSLT steps are initiated from PeopleSoft Application Engine programs, EN_AGITM_AML (for XML to ITEM_SYNC transformation), and EN_PDX_BOM (for XML to BOM_SYNC transformation).

- In addition, there is a basic capability to map some required, predefined values (such as source code and UOM) into PeopleSoft from Agile™ Page Two user-defined fields.

If your installation requires different or additional mappings from PDX to PeopleSoft outside of the standard delivery, you may need to modify these XSLT programs.

For example, if you want to map a custom user-defined field into the item description (and not use the Description field defined for Agile™ items), this would be done within the XSLT program for item transformation in PeopleSoft.

Important! PeopleSoft supports the *delivered* adapter processing only. Any modifications made to the adapter are considered to be configurations to the standard system.

Keep a test environment available containing the standard PeopleSoft Adapter code to assist you in evaluating differences between any configured version and the standard version that PeopleSoft delivers.

See Also

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” Setting Up Agile Product Collaboration™ for Use with PeopleSoft 8.8 Manufacturing, page 73

PART 2

Maintaining Bills and Routings

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Understanding PeopleSoft Bills of Material and Routings

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CHAPTER 7

Understanding PeopleSoft Bills of Material and Routings

This chapter provides an overview of PeopleSoft Manufacturing bills of material and routings and discusses:

- Bills of material (BOMs).
- Routings, tasks, work centers, and resources.

Bills of Material

PeopleSoft Manufacturing provides features such as revision control, component yield, alternate BOMs, multiple outputs, and operation overlap to maintain complex BOMs, resources, work centers, tasks, and routings dynamically. You can use PeopleSoft Workflow to automate approvals and controls between PeopleSoft Engineering and PeopleSoft Manufacturing. In addition, multimedia attachments, such as detailed work documents, drawings, and videos clarify and expand instructions for complex operations.

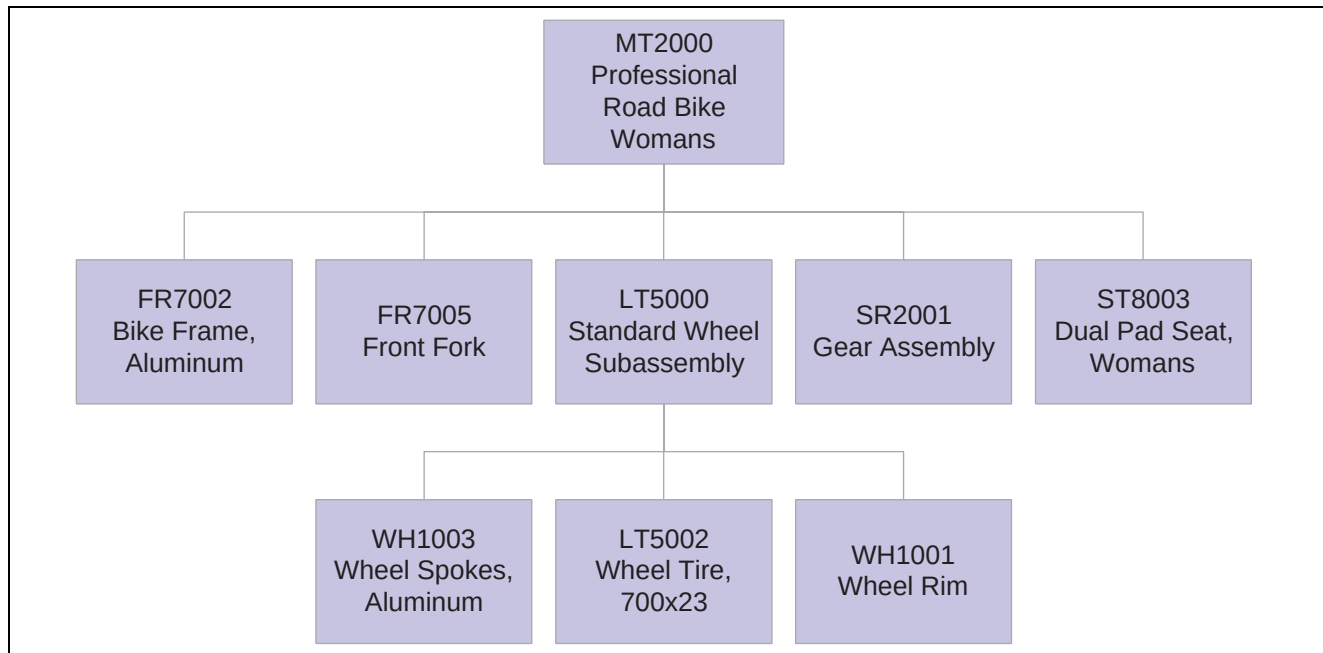
If you have PeopleSoft Engineering installed, you can integrate between PeopleSoft Manufacturing and PeopleSoft Engineering to maintain engineering change orders (ECOs), BOMs, and routings—both manufacturing and engineering versions—and document management. You can even make mass BOM changes.

You can make changes to BOMs and routings within PeopleSoft Engineering, and then release those changes to PeopleSoft Manufacturing under ECO control. You can also take advantage of a complete document management solution that enables you to manage and approve document changes within PeopleSoft Engineering and then deploy them within PeopleSoft Manufacturing.

You also have the option to define planning BOMs.

Example: BOM Structure

BOMs are design structures that you can use to define how to assemble or produce your end items or products. In a tree-like structure, BOMs list all the assemblies, intermediate items, and raw materials that go into a parent assembly, displaying the quantity of each that is required to make an assembly or end item.



BOM Structure Example

PeopleSoft Manufacturing enables you to maintain all your complex product structures. You can also alter BOMs, create alternate BOMs, gather where-used data, display indented inquiries, designate multiple outputs, make mass BOM changes, and phase out one item while adding another.

By creating alternate BOMs, PeopleSoft Manufacturing enables you to prototype and assign components to different operations using different BOMs. In addition, this gives you the ability to run multiple configurations without using PeopleSoft Product Configurator.

The multiple outputs functionality enables you to define co-products, recycle and waste by-products on the BOM. An example of this could be the orange juice process, which can have orange juice and orange concentrate as primary and co-products, respectively, and orange pulp and orange pits as recycle and waste by-products.

In addition to using basic, required BOM functionality, you can associate engineering drawings, text, documents, or multimedia representations to a BOM at the assembly or component level.

Within PeopleSoft Manufacturing, there are three types of BOMs:

- Manufacturing BOMs (MBOMs)
- Engineering BOMs (EBOMs)
- Planning BOMs

Manufacturing Bills of Material

Manufacturing bills of material (MBOMs) are the bills actually used within PeopleSoft Manufacturing to manufacture assemblies and in PeopleSoft Cost Management to determine product costs. While they reside in PeopleSoft Manufacturing, they can originate in either PeopleSoft Manufacturing or in PeopleSoft Engineering.

Using the PeopleSoft Bill of Material EIP, you can also import new and changed BOMs into PeopleSoft Engineering or PeopleSoft Manufacturing.

Manufacturing BOMs can have either a production or rework BOM type. Rework BOMs are used when you need to do additional or repair work on a completed assembly. This is useful if you have a standard rework process that requires additional components.

See Also

Chapter 8, “Maintaining Bills of Material,” page 147

Engineering Bills of Material

As stated previously, manufacturing engineers typically create engineering bills of material (EBOMs) as part of the design process. As existing products are modified and new products are introduced, you need the ability to isolate BOM changes from your production environment. With PeopleSoft Engineering, you can manage and develop EBOMs without impacting your MBOMs. When EBOMs are approved, you can copy or transfer them to production for use in manufacturing. You can also apply mass changes to EBOMs (or MBOMs) using the mass maintenance functionality.

Here is how EBOMs differ from MBOMs:

- EBOMs are isolated from manufacturing and aren't visible within PeopleSoft Supply Planning or PeopleSoft Manufacturing.
- EBOMs have relaxed edit checks.

For example, you can use pending items as components or define component placeholders on EBOMs when you don't yet know the actual item number.

- You can add EBOMs for assemblies and components that were added in PeopleSoft Inventory in a pending state.

See Also

PeopleSoft Engineering 8.8 PeopleBook, “Maintaining Engineering Bills of Material”

Planning Bills of Material

A planning BOM is an artificial grouping of items in a bill of material format. PeopleSoft Supply Planning uses planning BOMs for aggregate forecasting or aggregate reporting purposes. With planning BOMs, you can explode forecasting and facilitate both your master scheduling and material planning. You can create and maintain, on a summary level, all components that comprise a planning BOM for a group of assembly items or product families in a specific business unit.

For planning bills, the item ID (the parent item in the bill) is always a nonstockable item that represents a group or family of items. It must be defined in the business unit item attributes with *Planning* as the source code. It also represents an item that, while forecasted, cannot be ordered. Because planning items can be components of other planning items, you can create multiple levels of planning bills.

Planning BOMs are defined and maintained with the Planning BOMs page in PeopleSoft Supply Planning.

See Also

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner

Importing Bills of Material from External Sources

With the PeopleSoft Bill of Material EIP (BOM_SYNC) and Item Master EIP (ITEM_FULLSYNC), you can:

- Import new and changed items and item revisions into PeopleSoft.
- Import new and changed BOMs into PeopleSoft Manufacturing.
- Validate and correct errors on imported BOMs in separate BOM staging pages.

Routings, Tasks, Work Centers, and Resources

Routings, tasks, work centers, and resources are a fundamental part of PeopleSoft Manufacturing.

Routings

While a BOM specifies the components of an assembled item, the routing, typically created by engineering, defines the sequence of steps needed on the shop floor to create the assembled item. Therefore, a routing is a set of information detailing the method for manufacturing a particular item. It consists of sequentially numbered operations that reference the task to be performed, the work center in which the task is to be performed, the resources (crews, machines, and tools) to be used, and the time required to complete the task. In combination with labor and machine setup times and run rates, this operation data defines planning and standard cost information.

You can use routings in both discrete work order production and repetitive manufacturing. Routings determine the lead times for manufactured items that, in turn, determine the start and end dates for production. Routing hours and run rates also determine the conversion costs associated with a manufactured item.

Instead of defining an individual routing and alternatives for each manufactured item, you can define a routing for an item and then reference that item's routing for other items with a similar manufacturing process. This referenced routing is sometimes referred to as a master routing.

You can define master routings by item, item family, or item group. Master routings eliminate the need to maintain redundant routing information for those items that can share a single routing definition.

Once your BOMs and routings are defined, you can link them together as specific combinations (production options) that can be accessed by PeopleSoft Supply Planning.

Yield by Operation

Operation yield allows you to specify the quantity of goods expected to make it through the process. The expected loss can then be incorporated into the cost of the usable end items.

Routing Times

You can define routing times for both human labor and machines. In addition, you can maintain times for costing and planning. PeopleSoft Manufacturing breaks the time down into these amounts:

Setup Time

The amount of time required to prepare an item, machine, or work center for production.

Run Time	The amount of time necessary to process one unit (rate expressed in minutes, hours, or days) or the number of units that can be processed in one time period (rate expressed in units per minute, units per hour, or units per day).
Fixed Run Time	The amount of time necessary to complete the task, regardless of the number of units processed.
Post Production Time	The amount of time required to clean up, flush, or break down a machine, a work center, or an area, once production has been completed.
Queue Time	The amount of time that units must wait at an operation before setup (if there is setup) or processing can begin.
Intransit Time	The amount of time required to transport units from one operation to the next.

See Also

Chapter 15, “Defining Production Options,” page 313

Chapter 14, “Structuring Routings,” page 281

Tasks

Tasks are the jobs that can be performed within your manufacturing facility. When defining a task, you can set up default data, such as times and rates, that the system copies to an item’s routing when you select the task for a given operation. Multiple items can reference the same task or you can set up unique tasks for each item. Maintaining task data is optional.

Work Centers

A work center can consist of one or more people or machines and can represent a logical grouping of machines, a department, or a cost center. You can assign each operation or task on a routing to a work center in which the operation or task takes place. Additionally, you can assign one or more resources (crew, machine, tool) to each work center.

Resources

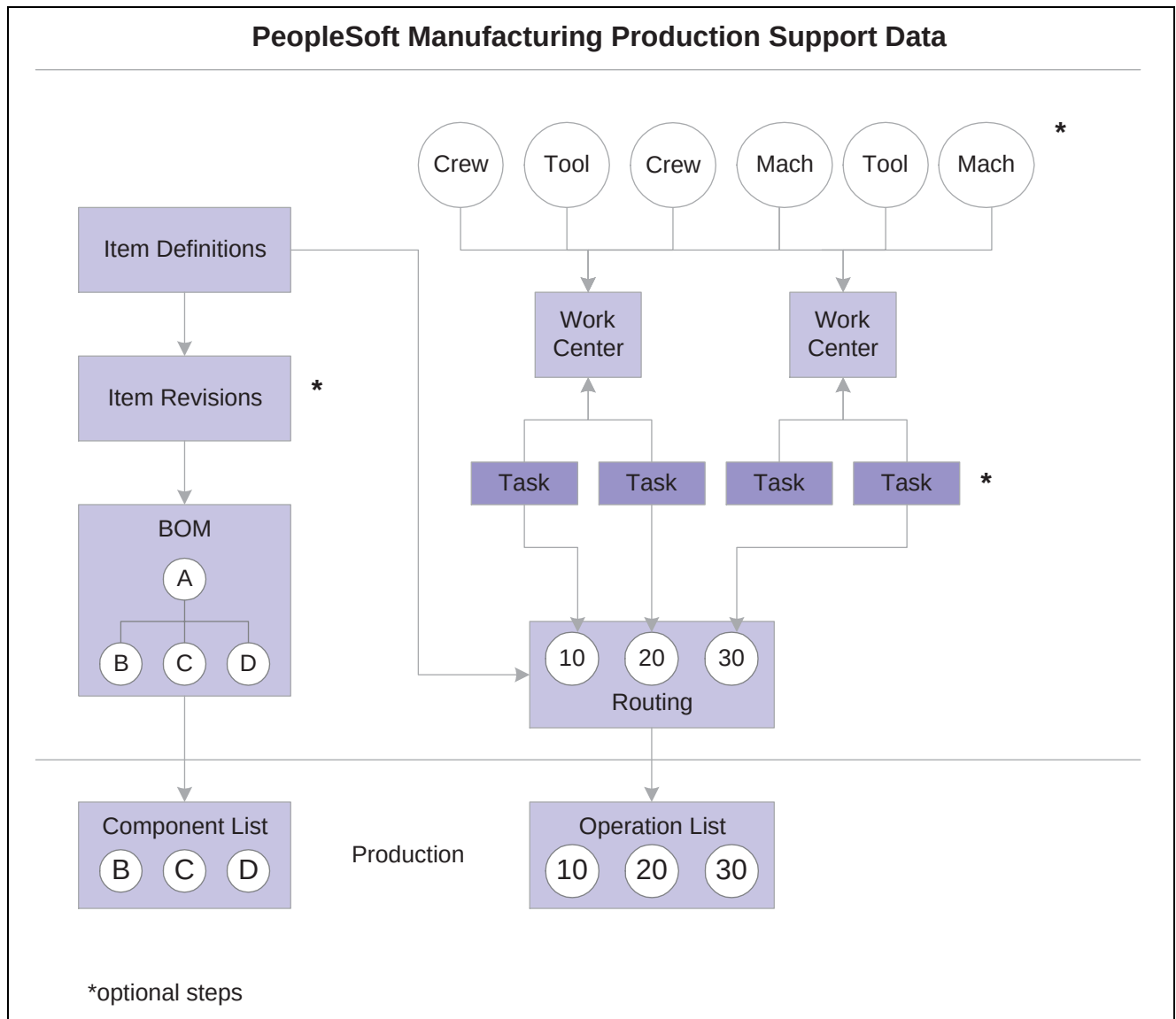
Resources are the crews, machines, and tools that can be used at work centers to complete tasks. When analyzing capacity for planning and scheduling, PeopleSoft Supply Planning looks at the individual resources that you assigned to the work center and schedules them accordingly.

How It All Fits Together

This diagram illustrates the different elements of PeopleSoft Manufacturing BOMs and routings and how they feed into the manufacturing process. The diagram also reflects the order of setup:

1. Define bills of material.
2. (Optional) Define resources, unless you are using PeopleSoft Supply Planning.
3. Define work centers; optionally, assign related resources.
4. (Optional) Define tasks and assign related work centers.

5. Define routings; optionally, assign related tasks.



PeopleSoft Manufacturing production support data

CHAPTER 8

Maintaining Bills of Material

This chapter provides an overview of manufacturing BOMs and describes how to define vendor access privileges for BOMs, ECRs, and ECOs.

Understanding BOM Maintenance

PeopleSoft Manufacturing enables you to define and maintain BOMs using the Maintain BOMs and Revisions component. However, before you begin, there are some prerequisites that you'll need to address.

Prerequisites

Before you begin defining and maintaining BOMs, these are some steps that may be required:

1. Adding items.
2. Deciding how you will maintain BOMs for assembly items (by effectivity date or by revision).
3. Deciding whether you want to verify BOMs online and defining your manufacturing BOMs defaulting, including component revision default settings.
4. Maintaining revisions (optional).
5. Determining whether you need to create rework BOMs, if you have a standard rework process in which you add components.
6. Considering the differences between single-output BOMs and multiple output BOMs.
7. Assigning associated primary BOMs as part of defining multiple outputs (optional).
8. Specifying the calculated BOM QPA (quantity per assembly) precision.

In addition, to access the Revision Documents, Assembly Documents, and Component Documents pages, you need to have PeopleSoft Engineering installed along with its Documentum functionality. With the Documentum Component Options page in Set Up Financials/Supply Chain, Common Definitions, Documentum, you can define which function buttons that will be available on the document-enabled pages.

If you have enabled PeopleSoft Workflow, when an change is made to a BOM, the system uses the BOM Change workflow to notify the manufacturing engineer (or other defined role) that a change has been made to the BOM.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Document Management Options

Chapter 6, “Integrating PeopleSoft 8.8 Manufacturing with Agile Product Collaboration™ (Version 8.0 or 8.5),” page 65

Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649

Common Elements Used in This Chapter

BOM Type

Select the type of BOM that you are creating. Values are:

- *Production*: Used as the basis for manufacturing assemblies or end items.
- *Rework*: Enables you to optionally create rework BOMs when you have a standard rework process where you include additional components.

For example, if you have a repair kit of components that you always issue when an item is reworked, you can define that repair kit here. As with MBOMs, you can define a primary rework BOM and up to 98 alternates by creating BOM codes.

Rework BOMs are not required to create rework production IDs.

Defining BOM Items

Before you can add a BOM for an assembly or end item, the end item and its component items (including substitutes) must be defined within PeopleSoft Inventory.

Once you’ve added the general attributes for the item, you must add the business-unit-specific attributes within PeopleSoft Inventory. In addition, specify whether an item is a purchased or manufactured item. While you can add BOMs for both manufactured and purchased items, the system considers only a manufactured item’s BOM for planning or cost management purposes. Therefore, to correctly plan for items you both make and buy, you should set the Source Code of these items accordingly.

You can maintain BOMs only for owned or consigned inventory items whose books use a costing method set to Standard Cost within PeopleSoft Inventory; the components can be owned or non-owned as well as being inventory or expensed items. In addition, you can’t control or manage the items using staged dates. Except for planning BOMs, you can add production and rework BOMs only for items that are approved and defined as an inventory item with a source code of Make, Buy, Floor Stock or Expense.

See Also

[Chapter 2, “Understanding PeopleSoft Manufacturing,” Item Substitution, page 26](#)

[Chapter 8, “Maintaining Bills of Material,” Adding Substitute Components, page 179](#)

PeopleSoft Managing Costs 8.8 PeopleBook, “Structuring Your Cost Management System”

Maintaining BOMs by Revisions or Effectivity Dates

When you define your assembly items by using the BOM Usage Defaulting group box, you determine if you will manage their BOMs using revisions. If you’re using Revision Control, you can specify the BOM maintenance method as By Effectivity Date or By Revision, and you can specify whether revisions can be automatically generated during mass changes. Maintaining effectivity information by revisions, instead of by date, validates and simplifies data entry during BOM maintenance because you specify the revisions and you don’t need to determine effectivity dates for the component. However, if you’re using revisions, and it’s easier to maintain BOMs using dates, you can still enter effectivity dates, and the system will check to see which revision is in effect on the date specified.

Note. All general attributes you set with this page apply to both engineering and manufacturing BOMs.

Page Used to Maintain BOMs by Revision or Effectivity Date

Page Name	Object Name	Navigation	Usage
MFG Business Unit Options	BUS_UNIT_OPT_MG	Set Up Financials/Supply Chain, Business Unit Related, Manufacturing, Manufacturing Options, MFG Business Unit Options	Set up manufacturing business unit options.

Options for Maintaining BOMs

Access the MFG Business Unit Options page.

MFG Business Unit Options	MFG BU Prdn Options	Auto Revision Scheme	BOM Message Default
Unit: US008			
Rate Maintenance / Defaulting ☒ By Work Center ☐ By Task		Online BOM Verification ☐ Always Verify Online ☒ Never Verify Online	
Default Calendar Codes Production Calendar Code: DEFAULT Run-time Calendar Code: DEFAULT		BOM Usage Defaulting ☒ Revision Control ☒ Auto Revision ☐ By Effectivity Date ☒ By Revision	
BOM Maintenance Settings ☒ Allow Blank Component Revision ☒ Default Component Revision ☒ Default Teardown BOM Component ☒ Components Align with Revision			

MFG Business Unit Options page

Always Verify Online

Runs the loop checking process online during BOM maintenance.

Never Verify Online

Does not run the loop checking process online during BOM maintenance: you can run the verification as a deferred process.

If you decide to change the online BOM verification from Always Verify Online to Never Verify Online, you must run the batch BOM verification to ensure there are no looping BOMs.

Note. When BOMs are complex and deep, we recommend that you select Never Verify Online to improve BOM maintenance performance and then run the BOM verification process from the BOM Verification page.

BOM Usage Defaulting**Revision Control**

Select this check box if you want to control items by revisions. If you selected this option and BOMs exist for the assembly item, the dates for the components specified in the BOMs must normally be aligned with the dates within the revisions. If you want to control the assembly item by revision but still allow for some off-cycle components (such as components that do not align with the exact start date of a revision), select this check box and also select the By Effectivity Date option. This enables you to maintain components on dates that do not align with the exact start date of a revision.

If you don't select this check box, then you are maintaining BOMs by date, and the By Effectivity Date and By Revision options for BOM maintenance are unavailable. In this case, By Effectivity Date is the default setting.

Note. Planning and expense items cannot be maintained by revision.

Auto Revision

If you've selected Revision Control, you can also select this check box. This indicates that revisions for the item can be automatically generated using a scheme defined at the business unit level. If revisions have already been created manually with the Revision Maintenance component, the system uses the revision scheme to select the next available revision.

If you designate that the item is to have its revisions created automatically, you can use the mass maintenance in PeopleSoft Manufacturing or PeopleSoft Engineering to create the revisions. You can do this in two ways: either by using BOM Mass Maintenance by Engineering Change Order (ECO) or BOM Mass Maintenance by Mass Maintenance Code (MMC).

The mass maintenance process will create revisions only for items that have both revision control and automatic revision selected. When automatic revisions haven't been selected to be part of the mass maintenance process, the process functions as a regular mass maintenance process.

Note. If you had not selected Revision Control and you now want to maintain BOMs by revisions and you've already created one or more BOMs for the item, you must make sure that the effectivity dates on the BOMs align with the effectivity dates on the revisions if you required all component changes to be tied to the start date of a specific revision. You can always clear the Revision Control option without deleting any revisions for the item.

By Effectivity Date

This setting specifies that you want BOM maintenance for revision-controlled items to be by date related to a revision. Enter dates on which assembly product structure components are in effect when maintaining BOMs using the Manufacturing BOMs Summary, Component, and Substitute Item pages. The system validates these dates so that they align with item revision dates if the Components Align with Revision setting on the MFG Business Unit Options page has been selected.

By Revision

This setting specifies that you want BOM maintenance for revision-controlled items to be by revision and not by date. You can associate effective and obsolete revisions with components using the Manufacturing BOMs and Component pages.

Note. Even if you do clear the Components Align with Revision option on the MFG Business Unit Options page, by selecting the By Revision option for a particular assembly item will force this specific assembly to have all components align with one of its revisions, since maintaining by date is not allowed.

Warning! For component items you want to use up (phase out), you must manually maintain obsolete date information. The obsolete date can be based on the projected phase-out date determined by the planning server Online BOM Verification

See [Chapter 3, “Defining Your Business Unit Structure,” Setting Up Manufacturing Business Unit Options, page 34.](#)

BOM Maintenance Defaulting

Within BOM maintenance, you can specify a revision for a component on a BOM. Using the MFG Business Unit Options page, you define how you want to handle component revision information.

You can use Allow Blank Component Revision and Default Component Revision to define component revision default settings that impact the Manufacturing BOMs pages. These two fields apply only to revision-controlled items. Furthermore, they operate independently of each other; therefore there are four possible combinations of settings. This table outlines what occurs in each of the four scenarios:

Allow Blank Component Revision Setting	Default Component Revision Setting	What It Means
Not selected	Not selected	When you maintain BOMs, you must enter a revision for any component that's revision-controlled. The system will not automatically insert any default component revisions. The inquiries display what you've entered on the maintenance pages.
Selected	Not selected	When you maintain BOMs, you can leave component revisions blank or select a revision for the component. The system will not provide a default value. The inquiries look at the appropriate assembly effectivity dates and display component revisions based on the date for which the inquiry is being performed. The BOM inquiries look at the selected assembly/end item effectivity date/revision and display the component's corresponding revision based on the date selected. This is the default setting combination for any business unit.

Allow Blank Component Revision Setting	Default Component Revision Setting	What It Means
Not selected	Selected	The system will not allow blanks and defines a default component revision based on today's date (current revision). If the Comp Rev (component revision) field doesn't have a revision defined, before you save the BOM, you need to go to each line and define a revision or press TAB to move out of the Comp Rev field to establish a default value. Inquiries display the revisions you've entered on the maintenance pages.
Selected	Selected	The system allows blank component revision fields and defines a default revision for all revision-controlled components that you add or change on the BOM. If a revision-controlled component with no component revision specified already exists on the BOM, and you make no attempt to change it, the system leaves the Comp Rev field blank.

See Also

[Chapter 8, "Maintaining Bills of Material," Maintaining Revisions, page 155](#)

[Chapter 8, "Maintaining Bills of Material," Verifying Bills of Material, page 186](#)

Rework BOMs

If you have a standard rework process in which you add components, decide whether you want to create rework BOMs. You can define a primary rework BOM and up to 98 alternates using BOM codes.

Multiple Output BOM Considerations

There are some conceptual differences between single-output BOMs (one primary item) and multiple output BOMs where you define at least one co-product.

Single Output BOMs

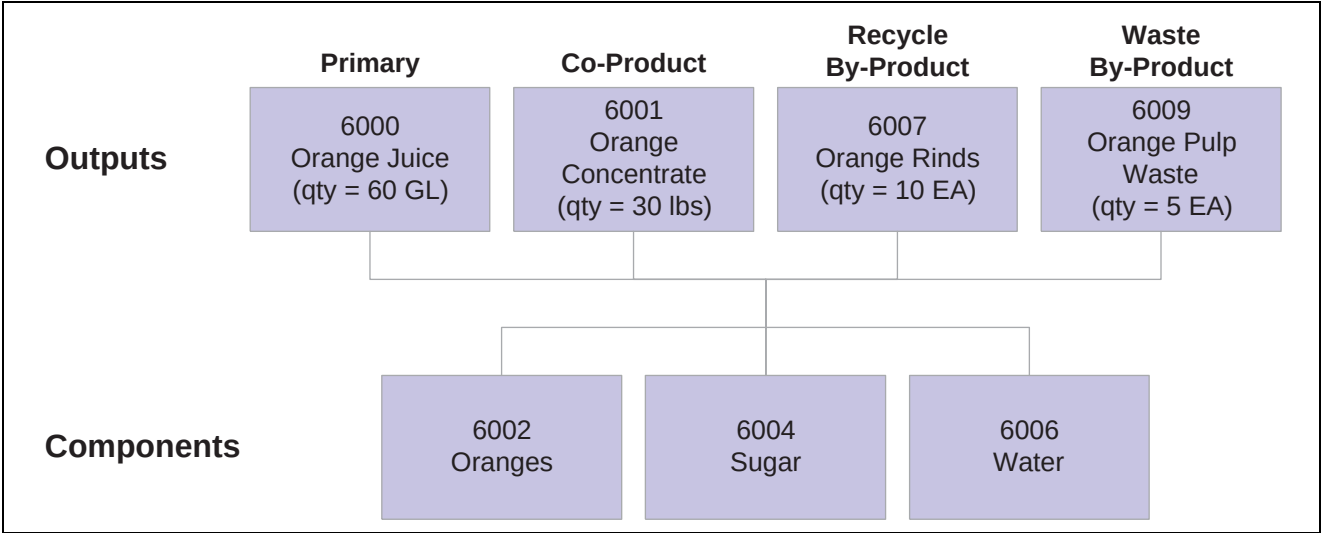
BOM quantity is a scaling device field that enables you to enter a product structure when the assembly specifications are in a base greater than one unit. You determine the assembly quantity to which the component's quantity per assembly or per order is applied. If the BOM quantity is greater than one, enter the component quantity in terms of the BOM quantity. If set to one1, the component quantity is the amount of the component required to make one unit. You can use BOM quantity for batched bills or if you will make only a certain quantity of an item at a time.

Multiple Output BOMs

When multiple outputs are defined for a BOM, you are indicating that:

- There are to be at least two end items generated during production, one of which is the primary item.
- The item ID specified for the BOM now represents a batch item, in addition to representing the primary item to be completed.

In this example, the BOM is defined for item ID 6000 which is a batch item. The outputs for batch item 6000 include primary item 6000, co-product 6001, recycle by-product 6007, and waste product 6009.



Multiple Output BOM example

When used on a multiple output BOM, the BOM quantity represents the in-process quantity for the BOM item as a batch item, as opposed to the item ID as a primary item. For example, if the example BOM structure has a BOM quantity defined as 150, then the in-process units of the batch are 150.

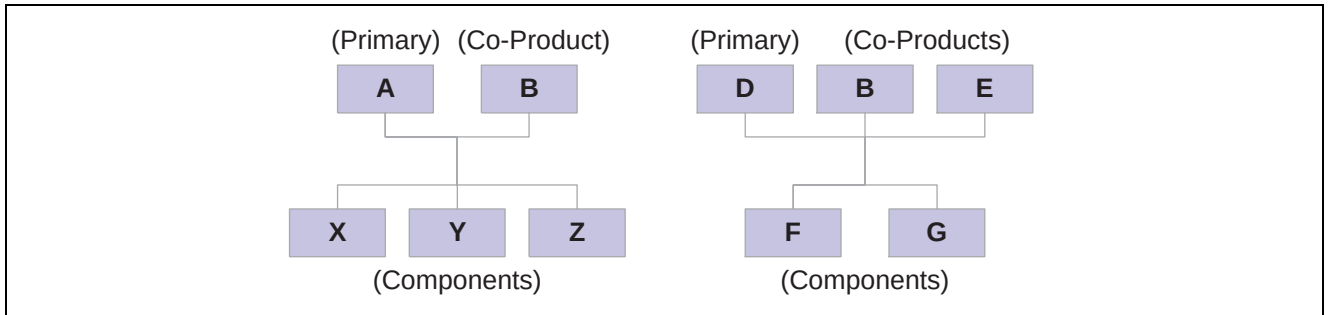
Note. This example maintains that routing times (planning and costing) and rates are for a single batch unit.

In addition, when creating production IDs or production schedules, you must define the production quantity in terms of batch units.

Assigning Associated Primary BOMs

With multiple outputs, it’s possible that a particular co-product can be created in several ways—an item is a co-product on more than one item’s primary BOM. By assigning an Associated Primary BOM to a co-product, you are indicating to the system which BOM to use in exploding the co-product to the next level.

In this example, B is a co-product on two different processes:



Assigning Associated Primary BOMs - example

In the first structure, A is the primary (item), with B as the co-product, and X, Y, and Z are the components. In the second structure, D is the primary and B and E are co-products, with F and G as the components. Since there are two ways of making the same product (B), you need to decide which structure to use when exploding to lower levels. Therefore, indicate a primary structure associated with each item that can exist as a co-product, but not as a primary. You can assign B's associated primary BOM as either A or D. If B has its own BOM structure, and you want to use that structure when exploding to lower levels, then you can leave B's associated primary BOM as B.

When exploding to lower levels, the system checks if there is an associated primary defined for this item. If there is an associated primary item, the system uses its BOM code 1 to explode to lower levels.

Note. While the default is the item itself, you can select a different Associated Primary BOM. To do this, either no associated primary BOM code 1 exists or, if it exists, the Item ID must exist as a co-product on that BOM.

Specifying the Calculated BOM QPA Precision

By using the Manufacturing Installation Options page in Set Up Financials/Supply Chain, you can set the calculated QPA (quantity per assembly) precision. This is especially important when you utilize a large BOM quantity and a relatively small quantity per assembly. When you maintain a BOM and define the quantity per assembly or per order, you are limited to a precision of 4 places to the right of the decimal.

However, the system calculates the quantity per by dividing the entered quantity per by the BOM quantity, maintained to the precision defined on the Manufacturing page. For example, if a calculated QPA results in 6.54321, and the QPA setting is set to 4 places, the system recognizes this as 6.5432.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting the PeopleSoft Manufacturing Installation Options

Maintaining Revisions

To create and maintain BOMs by revisions, use the REV Maintenance component (EN_REVISION).

You can maintain revisions, including defining codes and the dates the revisions become effective. You can also attach text, documents, and attachments to revisions.

By defining revision codes, you determine the specific dates revisions become effective.

Therefore, prior to being able to maintain BOMs by revisions, you must define revision codes. Additionally, to reference revisions for a component on a BOM, you must first define the component's revisions.

Note. An alternative to predefining revision codes is to generate revisions automatically. This feature, however, is available only through the BOM Mass Maintenance process.

See Also

Chapter 9, "Making Mass BOM Changes," page 191

Pages Used to Define and Maintain Revisions

Page Name	Object Name	Navigation	Usage
REV Maintenance - Detail	EN_REVISION	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Item Revisions, REV Maintenance, Detail	Define revision codes and determine the date that those revisions become effective.
REV Maintenance - Text	EN_REV_TEXT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Item Revisions, REV Maintenance, Text	Enter text you want to associate with a revision.
REV Maintenance - Documents	EN_REV_DC	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Item Revisions, REV Maintenance, Documents	Associate, view, and manage pertinent revision documents in the embedded document management system. Note. You must have PeopleSoft Engineering installed to access this page.
REV Maintenance - Attachments	EN_REV_ATT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Item Revisions, REV Maintenance, Attachments	Associate attachments with an item revision.

Defining Revision Codes

Access the REV Maintenance - Detail page.

REV Maintenance

[Detail](#)
[Text](#)
[Documents](#)
[Attachments](#)

Unit: US008
Item: SR2201 Std UOM: EA Source Code: Make
Gear Subassembly

Revisions

Customize | Find | View All |

First 1 of 1 Last

*Rev	*Eff Date	Description
A	01/01/1985	Initial Introduction

REV Maintenance - Detail page

Rev (revision) and **Eff Date** (effective date) Enter values for each revision code that you're defining.

While you can enter as many user-defined revisions as you would like, there can be no overlapping dates and no gaps between revision dates for a specific item.

Note. You can't use the same revision multiple times for an item. Also, you can't delete a revision if it's tied to an item or one of its BOM components or if it's on a production order or an ECO. If a component is used on a BOM or an ECO, and you attempt to change revision dates for the component, you will see a warning.

By looking at an example, you can see how existing revisions and BOM effectivity dates are impacted when you manually insert or when the system automatically inserts a new revision. The obsolete date of the revision just prior to the inserted revision will now have a date of one day before the effective date of the newly inserted revision. Also, if an obsolete date for a revision is changed due to the insertion of a new revision, this obsolete date will also be changed on any BOM on which it appears.

In this example, you have a revision-controlled item called LT5000 with these revisions:

Revision	Effective Date	Obsolete Date
AA	01/01/1900	12/31/1996
BB	01/01/1997	12/31/1997
CC	01/01/1998	12/31/1998
DD	01/01/1999	12/30/2099

In addition, LT5000 has this BOM:

Component	Effective Revision/Date	Obsolete Revision/Date
A001	AA (01/01/1900)	CC (12/30/1998)
A002	AA (01/01/1900)	DD (12/30/2099)
A003	AA (01/01/1900)	-- (12/31/2099)

If you manually or automatically add a new revision named CCC on 05/01/1998, then revisions and their underlying effectivity dates will change. In addition, component BOMs will also reflect this change. Here's a table reflecting these changes:

Revision	Effective Date	Obsolete Date	Note
AA	01/01/1900	12/31/1996	
BB	01/01/1997	12/31/1997	
CC	01/01/1998	04/30/1998	Obsolete date has changed to one day prior to effectivity date of CCC (the new revision).
CCC	05/01/1998	12/31/1998	New revision is added on 05/01/1998.
DD	01/01/1999	12/31/2099	

The BOM is now as follows:

Component	Effective Revision/Date	Obsolete Revision/Date
A001	AA (01/01/1900)	CC (04/30/1998): BOM changes reflecting changes made to revision effectivity dates.
A002	AA (01/01/1900)	DD (12/30/2099)
A003	AA (01/01/1900)	-- (12/31/2099)

Although the obsolete revision (CC) remains the same, the BOM obsolete date is changed to the new obsolete date of CC.

When a revision-controlled item is specified in production, the system selects components by determining which revision is in effect at the start date or due date of production and which components are in effect for that revision and using the production start or due date to determine which components for the revision are in effect. This is also true when a revision-controlled item has phantoms. You can optionally build to an older or a future revision by selecting a specific revision for the item. When an alternate revision is specified, the system uses the product structure associated with that revision.

You can also maintain revisions for your component items. When adding a revision-controlled component to a BOM, the component revision field becomes accessible to allow entry of the component’s revision.

Note. If you have cleared the Components Align with Revision option on the MFG Business Unit Options page to allow for component additions on BOMs that are not aligned with an exact start date of a revision, you will receive a warning regarding non-aligned components when changing dates of existing revisions. This warning occurs when the change in a revision date causes any existing non-aligned components on BOMs to move to a different revision number based on the date changes you make. Any impacted components are displayed in Revision maintenance so they can be addressed manually if needed.

Specifying Revision Attachments

Access the REV Maintenance - Attachments page.

File Ext (file extension)	Select the type of media you want to attach.
Document ID	Enter the file name.
	Click the Attachments button to launch the multimedia object attached to the revision.

Note. Attachments have no integration or relation to the embedded document management functionality. They are most useful if you aren’t using the document management functionality.

Maintaining Bills of Material

To create and maintain BOMs, use the BOM Maintenance component (BOM_MAINTENANCE).

You can create and maintain the product structure for a manufactured item at a detailed level. You can define multiple outputs and add text, documents, or attachments for an assembly or for the components associated with an assembly. You can also create reference designators and component item substitutes.

You can create BOMs only for existing assembly items that are either owned or consigned and approved and whose source code is set to either Make or Buy. Additionally, you can maintain BOMs only for those assemblies or end items whose Used in MFG check box is selected on the Define Business Unit Items - General: Costing page.

All assembly, output, and component items must use a *Standard Cost* profile for all of their books. Components can be owned or non-owned or non-owned and consigned with a source code of Make, Buy, Floor Stock, or Expense.

In addition to creating a primary BOM (with a BOM Code equal to 1), you can specify up to 98 alternate BOMs by entering additional BOM codes (greater than 1) in the dialog box displayed prior to accessing the Manufacturing BOMs pages.

When you need to do additional or repair work on a completed assembly, you can create rework BOMs. This is especially useful if you have a standard rework process that requires additional components. As with manufacturing BOMs, you can define a primary rework BOM and up to 98 alternates using BOM codes. You create rework BOMs by selecting Rework as the production type when adding a BOM on the Manufacturing BOMs pages. Rework BOMs are always single-level BOMs. Also, PeopleSoft Cost Management will not consider Rework BOMs for any type of cost maintenance. The rework BOM does not include the assembly being reworked as a component. In PeopleSoft Manufacturing, when you firm up or release the rework production ID, the system copies the rework BOM to create a component list and automatically adds the assembly being reworked. Rework BOMs can't include multiple outputs; the system automatically includes the assembly being reworked as an output when production is created.

When you add a BOM for an item or change any attribute of an existing BOM, the system optionally sends a workflow notification to the selected roles you've defined — such as engineering manager or cost accountant.

See Also

[Chapter 10, “Displaying Bills of Material,” page 217](#)

[Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649](#)

Common Elements Used in This Section

BOM State

Select a BOM state. Values are:

- *Engineering*: Select to view EBOMs.
- *Manufacturing*: Select to view MBOMs.

Verify BOM

Indicates whether the system performs online loop checking. Set this option at the manufacturing business unit level on the MFG Business Unit Options page.

On the MFG Business Unit Options page, you can elect to Always Verify Online or Never Verify Online. The check box on the Engineering BOM Summary page reflects the manufacturing option that you select.

If you select to always verify online, the system checks for looping bills of material as you maintain the assembly or end item's bill. This prevents you from adding the end item as one of its components at this level or any lower levels. If you select to Never Verify Online, loop checking runs as a deferred process.

Pages Used to Maintain Manufacturing Bills of Material

Page Name	Object Name	Navigation	Usage
Summary	EN_BOM_MAINT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Summary	Maintain all components that comprise a specific manufacturing BOM for a specific assembly in a specific business unit. You can create and maintain a rework BOM to define a standard kit of components for use in repair. You can also indicate which components can be recovered if the assembly can be torn down into component parts. Note. You'll maintain bills of material a single level at a time.
Header - Assembly Text	EN_BOM_TEXT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Assembly Text	Associate text with any assembly.
Header - Assembly Attachments	EN_BOM_ATT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Assembly Attachments	Associate attachments with your BOMs.
Header - Assembly Documents	EN_BOM_DC	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Assembly Documents	Associate, access, and manage pertinent assembly BOM documents in the embedded document management system. Note. You must have PeopleSoft Engineering installed to access this page. See <i>PeopleSoft Engineering 8.8 PeopleBook</i>, "Managing Documents".
Header - Outputs	EN_BOM_OUTPUTS	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Outputs	Enter output information.

Page Name	Object Name	Navigation	Usage
Vendor Access List (optional)	EN_SS_BOMVND_LST	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Vendor Access List	Access a current list of vendors who have access to a specific item. You must have PeopleSoft Engineering installed to view and access this page.
Send Email to Vendors - New Message (optional)	EG_IC_EMAIL	- Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Vendor Access List Click the Send Email to Vendors link on the Manufacturing BOMs - Header: Vendor Access List page. - Engineering, BOMs and Revisions, Maintain EBOMs and Revisions, Engineering BOM Maintenance, Header, Vendor Access List Click the Send Email to Vendors link on the Manufacturing BOMs - Header: Vendor Access List page.	Send email to vendors. You must have PeopleSoft Engineering installed to view and access this page.
Components - Component Details	EN_COMP_MAINT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Component Details	Add details for each assembly BOM component.
Components -Text	EN_COMP_TEXT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Text	Attach and maintain component text.
Components - Attachments	EN_COMP_ATT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Attachments	Associate attachments with your components.

Page Name	Object Name	Navigation	Usage
Components - Documents	EN_COMP_DC	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Documents	Associate, access, and manage pertinent component documents in the embedded document management system. You must have PeopleSoft Engineering installed to access this page. See <i>PeopleSoft Engineering 8.8 PeopleBook</i> , “Managing Documents”.
Components - Reference Designators	EN_COMP_DESIG	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Reference Designators	Associate designators to a component of an assembly item.
Components - Dimensions	EN_COMP_DIM	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Dimensions	Specify and maintain BOM component dimensions.
Components - Substitutes	EN_COMP_SUB	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Substitutes	Add substitute components. Note. Substitutes must be defined and approved in PeopleSoft Inventory.
Copy Business Unit Substitute Items (optional)	EN_BOM_SUB_ITEM_SP	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Components, Substitutes Click the Copy BU Substitute Items button.	View valid substitutes for the component, and copy the substitutes to the BOM.

Maintaining BOM Summaries

Access the Manufacturing BOMs - Summary page.

Summary Header Components													
Unit: US008		Verify BOM ☐											
Item ID: MT2000		Professional Road Bike, Womans											
BOM Type: Production		BOM Code: 1		Serial Control: N									
BOM Qty: 1		Std UOM: EA		Source Code: Make									
Components Customize Find View All First 1-6 of 13													
*Component ID	Description	Comp Rev	Op Seq	Eff Rev	Obs Rev	Quantity	Std UOM	*Per	Pos	*Yield	Source Cd		
FR7002	Bike Frame, Aluminium		10	A	----	1.0000	EA	Asy		100.0000	Buy		
FR7005	Front Fork	BB	10	A	----	1.0000	EA	Asy		100.0000	Buy		
FR7012	Primer Paint		40	A	----	0.5000	GAL	Asy		100.0000	Buy		
FS3000	Bolt		10	A	----	10.0000	EA	Asy		100.0000	Floor Stck		
FS3001	Washer		10	A	----	10.0000	EA	Asy		100.0000	Floor Stck		
FS3002	Nut		10	A	----	10.0000	EA	Asy		100.0000	Floor Stck		

Manufacturing BOMs - Summary page

Note. When BOMs are complex and deep, we recommend you run the BOM Verification Process and set BOM verification to Never Verify Online to improve BOM maintenance performance and, use the batch BOM Verification Request page.

BOM Type

Select the type of BOM you're creating. Values are:

- **Production:** Use manufacturing BOMs as the basis for manufacturing assemblies or end items.
- **Rework:** You can create rework BOMs when you have a standard rework process where you typically include additional components. For example, if you have a repair kit of components that you always issue when an item is reworked, you can define that repair kit here. As with manufacturing BOMs, you can define a primary rework BOM and up to 98 alternates by creating BOM codes. Rework BOMs aren't required to create rework production IDs.

Note. You can't add the end item to the rework BOM as a component. The system automatically assigns the reworked item as a component when you release a rework production ID in PeopleSoft Manufacturing.

BOM Qty (BOM quantity)

When BOMs contain a single item output: The BOM quantity acts a scaling device that enables you to enter a product structure when the end item's specifications are in a base greater than 1 unit. The BOM Quantity is the expected output quantity after all operation yield loss occurs. You determine the assembly quantity to which the components' quantity per assembly or per order is applied. If the BOM quantity is greater than 1, enter the component quantity in terms of the BOM quantity. If you set the BOM quantity to 1, the component quantity is the amount of the component required to make 1 unit.

When BOMs contain multiple outputs: If a primary item and co-products are specified as output items on the BOM, the BOM quantity must match the primary item's average order quantity (AOQ) as defined in the Define Business Unit Item - Manufacturing: General page. If you change the BOM quantity, the system prompts you to update the AOQ with the newly entered BOM quantity. Keeping the two quantities in sync ensures correct costing of the output items.

For serial-controlled items, the BOM quantity must be a whole number. PeopleSoft supports a calculated QPA (quantity per assembly) precision rounded from 4 to 10 places to the right of the decimal, depending on the installation setting on the Manufacturing Installation Options page in Set Up Financials/Supply Chain).

Sort Option

Select one of these values:

- *Component*
- *Effectivity*
- *Op Sequence* (operation sequence)
- *Pos Number* (position number)

Component ID



Select the component that you want to add to the BOM.

Click the View Related Links button to access the Item Search Criteria page to locate a different item.

Note. A component can’t be the same as its parent, and you can’t have overlapping effectivity dates for the same component.

Furthermore, you cannot add staged date-controlled items and configured items as components on BOMs.

When adding a component with item status of Hold or Discontinue, you will receive a warning message. Similarly, when updating components with item status of Hold or Discontinue, you will receive a warning message at Save time. In both cases, the warning message will not prevent you from performing the action.

Note. You cannot add an Inactive item.

Comp Rev (component revision)

The value displays if any component on the bill is under revision control. For items under revision control, you can associate a specific component revision with the assembly item.

Depending on how you set business unit level manufacturing options with the MFG Business Unit Options page, the system either allows you to leave Comp Rev blank, select a default value in the Comp Rev field, or requires you to select a different component revision for each revision-controlled component.

If the system is set up to default component revision, the Comp Rev column initially displays the current revision. When you enter effective dates, the revision is updated with the component revision effective on the date specified.

Op Seq (operation sequence)

Indicate where in the manufacturing or rework process you need the component. The operation sequence refers to an operation on the assembly item’s routing.

For manufacturing BOMs, this is the item’s production routing, and for rework BOMs, it’s the item’s rework routing.

The default operation sequence is 0 which is the first operation of the manufacturing or rework process. If you set the operation sequence for all items to 0, the system assumes that all items are needed at the beginning of production and therefore need to be issued at the start of the first operation.

You define operation sequence on the item's routing by using the Routing Definition Summary page.

When maintaining the BOM, you can select any operation on the assembly item's routing. Once the routing has been established, the system lists the valid operation sequences for all corresponding routing codes and routing types in the Op Seq Detail column.

For production BOMs, the system displays operation sequences only for production routings.

For rework BOMs, the system displays operation sequences only for rework routings.

Note. If a master routing is in use, then valid operation sequences include all manufacturing sequences associated with the item's master routing.

Because a work center is associated with the routing's operation, PeopleSoft Manufacturing uses the operation information to determine the work center to which the component must be delivered.

When the component's issue method is *Issue* or *Replenish*, the component is issued to the work center and is stocked in and consumed from the work center's WIP location storage area.

When the component's issue method is *Kit*, the work center is still used as the indicator for material delivery. The production ID, however, is charged directly for the component and won't be consumed from the WIP location.

If the operation sequence specified for the component is 0 or does not exist on the routing, the system assumes the material is required at the start of production. It will issue the material to the work center associated with the production area when the item is being built.

When the operation sequence is set to 0, it is assumed that the component item will be used at the first operation.

If you enter the BOM before the routing, you can return to the BOM Summary page and add the relevant operation sequence after entering the routing.

Eff Date (effective date) **Obs Date** (obsolete date)

Enter dates for the components of the assembly item.

When replacing a Discontinued (use up) item on the BOM, the obsolete date of the discontinued item and the effective date of the replacement item must be manually set to the same date. Use the projected use-up date generated in the Planning Engine as the suggested obsolete date.

If you are using revisions, enter valid revisions in the Eff Rev (effective revision) and Obs Rev (obsolete revision) fields.

Note. These fields refer to the effective and obsolete revisions of the assembly, not the component on the assembly. The obsolete date or revision must be later in time than the effective date. The component will be effective from the start date (or beginning of time) of the effective revision through the end date (or the end of time) of the obsolete revision.

Per

Values are:

- *Asy* (assembly)
- *Ord* (order)

This field determine how many of each component is needed in the parent assembly to manufacture or rework the specified batch quantity. If the quantity is per assembly, the quantity represents the number of that component required to manufacture one end item.

If the quantity is per order, it indicates that the component quantity is a fixed amount, regardless of the production quantity.

Additionally, if the component is serial-controlled, the Quantity Per must be a whole number.

To provide greater flexibility when defining MBOMs, the system doesn't require the Quantity field to follow the quantity precision rules defined for the item. A warning will be issued if you define a decimal quantity value for an item whose quantity precision value is a whole number.

For example, if 1 B0004 component is required to make 2 assembly A0001s, when defining the BOM, the QPA for B0004 would be 0.5. If the system applied the rounding rules to the QPA, it would round the QPA for B0004 to 1, thereby inflating production costs.

While Quantity Per can be maintained with a precision of 4 places to the right of the decimal, a calculated QPA can be defined with a precision from 4 to 10 decimal places. Calculated QPA is determined as (Component QPA/BOM Qty).

This calculated QPA is used to determine the assembly items cost and to plan and schedule components.

Engineering Considerations

If you are using PeopleSoft Engineering, and there are any outstanding engineering change orders (ECOs) pending for the item, and you've checked the ECO Pending Alert check box on the ECO Item Status page, the system displays the ECO button next to the assembly Item ID in this entire component. Click the ECO button to see information about the pending ECOs associated with this item.

See Also

- [Chapter 8, “Maintaining Bills of Material,” Maintaining Revisions, page 155](#)
- [Chapter 12, “Defining Work Centers,” page 251](#)
- [Chapter 8, “Maintaining Bills of Material,” Maintaining BOMs by Revisions or Effectivity Dates, page 149](#)
- [Chapter 22, “Issuing Material to Production,” Understanding Component Issue Methods, page 481](#)
- [Chapter 14, “Structuring Routings,” page 281](#)

Specifying BOM Assembly Attachments

Access the Header: Assembly Attachments page.

- Document ID** Enter the file name for the attachment.
- File Ext** (file extension) Select the type of media you want to attach.
-  Click the Attachments button to launch the multimedia object attached to the revision.

Note. You must set up file extensions on the File Locations Page in Set Up Financials/Supply Chain.

See Also

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, “Defining Procurement Options,” Defining File Locations

Defining BOM Outputs

Access the Header: Outputs page.

SummaryHeaderComponents

[Assembly Text](#)[Assembly Attachments](#)[Assembly Documents](#)[Outputs](#)[Vendor Access List](#)

Unit:US008

Item ID:ECOSR2001Gear Subassembly

BOM Type:Production

BOM Code:1

Serial Control:N

BOM Qty:1

Std UOM:EA

Source Code:Make

Verify BOM

Outputs

CustomizeFindView All1 of 1FirstLast

Output SummaryAttributes

*Output Type	*Output Item	Description	Op Seq	Eff Rev	Obs Rev	*Output Qty	Std UOM	*Per		
Primary	SR2001 	Gear Subassembly		----	----	1.0000	EA	Asy	+	-

Header: Outputs page

Output Summary Tab

- BOM Qty** (BOM quantity) Although this is the default information from the Manufacturing BOMs-Summary, you can change this quantity in the header portion of this page.

The detail portion of the page contains the end item as the *Primary* item, and this can't be deleted. As a result, if you aren't maintaining multiple outputs, you can simply bypass this page and the primary item is defined as the only output.

When there is only one output for a BOM (the *Primary* output), all fields in the row are unavailable, with default settings of the beginning of time to the end of time for the effectivity dates, 100 percent for the percentage fields, and output quantity set to 1.

However, if another co-product is inserted, the primary's allocation percentage and cost percentage fields are accessible.

Conversely, if all the co-products are deleted from the BOM, all the fields on the primary item, except the output quantity, are unavailable for input and set back to the defaults.

If you are maintaining a rework BOM, this page lists only the reworked item as the end item.

Note. You can't define co-products or by-products with rework.

Adding Outputs

Output Type

Select the type of output that you are adding. Values are:

- *Co-Product*
- *Primary*
- *Recycle*
- *Teardown*
- *Waste*

Note. You cannot add an additional primary product.

If you have only one output on this BOM, then it's the primary output.

A *Co-Product* is an item that is produced as part of the manufacturing process along with the Primary output. It shares the cost of the process, and there may be independent demand in Planning for this item. Examples of co-products are orange juice and orange concentrate in drinks processing.

If the item is a co-product, the system checks to see whether this item's associated primary is set to itself, which is the default. It will then ask you if you want to update the co-product's associated primary to this primary assembly item.

A by-product can be either a *Waste* product that needs to be disposed of or a *Recycle* by-product that can be used as an input to other processes. The by-product is incidental to the process and will have either a relief (negative) cost for Recycle by-products or a disposal (positive) cost for Waste by-products.

Waste by-products could also have no cost associated with them. There would probably not be independent demand for by-products. Examples of recycle by-products are orange pulp.

Output Item

The item must be an existing, inventory, and standard cost item.

Output items can't be floor stock or expense items.



Click the Item Search button to access the Item Search Criteria page to locate a different item.

A number of restrictions apply to the Output Type and Output Item fields:

- An item can't be a co-product and by-product on the same BOM.
- A primary item can be neither added nor deleted from a BOM. The system always automatically adds the assembly/end item for which the BOM is created as the primary output item.
- By-product items must have a source code of *Buy*.
- Co-product items must have a source code of *Make*.
- Co-product items cannot be phantom or configured items.
- A co-product item cannot be the same as the primary item.
- An item can't be both a co-product and a component on the same BOM.
- An item can be both a by-product and a component on the same BOM.
- As long as the effectivity dates don't overlap, the item can exist as a by-product more than once on the BOM; at different operations, or at the same operation.
- An item cannot be both a waste and a recycle by-product on the same BOM.
- Additional outputs cannot be added to rework BOMs, phantom BOMs, or to configured item BOMs.

Operation Sequence

The operation sequence is inaccessible for any co-products because the co-product can be generated only at the last operation. You can specify operation sequences for by-products. If the operation sequence specified on the output doesn't exist on the routing chosen for production, then it's assumed that the by-product will be generated at the last operation on the routing.

The operation sequence operates in a similar fashion for outputs as it does for the components. A difference, however, is that for components, an operation sequence of 0 means that it is needed at the first operation. For outputs, an operation sequence of 0 means it will be generated at the last operation.

The effectivity dates and revisions behave similarly to component dates. If the assembly item is revision-controlled by revision, then the Eff Rev (effective revision) and Obs Rev (obsolete revision) will be displayed. On the other hand, if the assembly item is revision-controlled by date, then the Eff Date (effective date) and Obs Date (obsolete date) will be displayed. For the primary item and any co-products, these fields show the beginning of time (01/01/1900 or ---) and the end of time (12/31/2099 or ---) and are inaccessible. Only by-products have accessible effectivity dates.

Output Qty (output quantity)

Enter the quantity. The default quantity for the primary item appears, but you can change it if there are additional co-products.

You must enter a quantity for each output.

Primary and co-product quantities are expressed in relation to the BOM quantity. By-product output quantities are expressed in terms of the expected operation start quantity.

For single-output BOMs (no co-products), the BOM quantity on the primary item needs to be the same as the Output quantity. Therefore, if you change the BOM quantity, the system checks to see if the primary item is the only co-product on the BOM. If so, the system automatically updates the primary item's output quantity to the BOM quantity.

If the BOM already contained additional co-product outputs, and you delete all these additional outputs from the BOM, the system gives a warning that the primary output quantity will be reset to the BOM quantity.

In addition, if the output quantity is being used, we recommend that it be identical to the item's average order quantity defined in the Define Business Unit Item - Manufacturing: General page.

Note. For multiple output items, the BOM quantity for the batch BOM item must match the average order quantity that is defined for the item.

Std UOM

The quantity is considered to be in the output item's standard unit of measure.

Note. Since co-products can have different UOM values, the quantities for all the co-products do not need to add up to the BOM Quantity.

Output Qty Per

This display-only field works with co-products only. Values are:

- *Asy* (assembly): This indicates the output quantity has a relationship to the BOM quantity. If the output quantity for a BOM quantity of 200 is 3, and you produce a batch with a quantity of 400, it's expected that the output quantity would be 6.
- *Ord* (order): This indicates that the output quantity is a fixed amount, regardless of the BOM or batch size.

The quantity code for the co-products is based on assembly and cannot be changed.

Attributes Tab

Select the Attributes tab.

Res % (resource allocation percentage)

Use this field to determine how much of the BOM quantity each co-product represents. It is used during completions to determine what percentage of the components should be consumed for each co-product and primary item.

Cost % (cost allocation percentage)

Use this to distribute the cost across the co-products. The cost percentage indicates the percentage of the total batch costs to be applied to the primary or co-products.

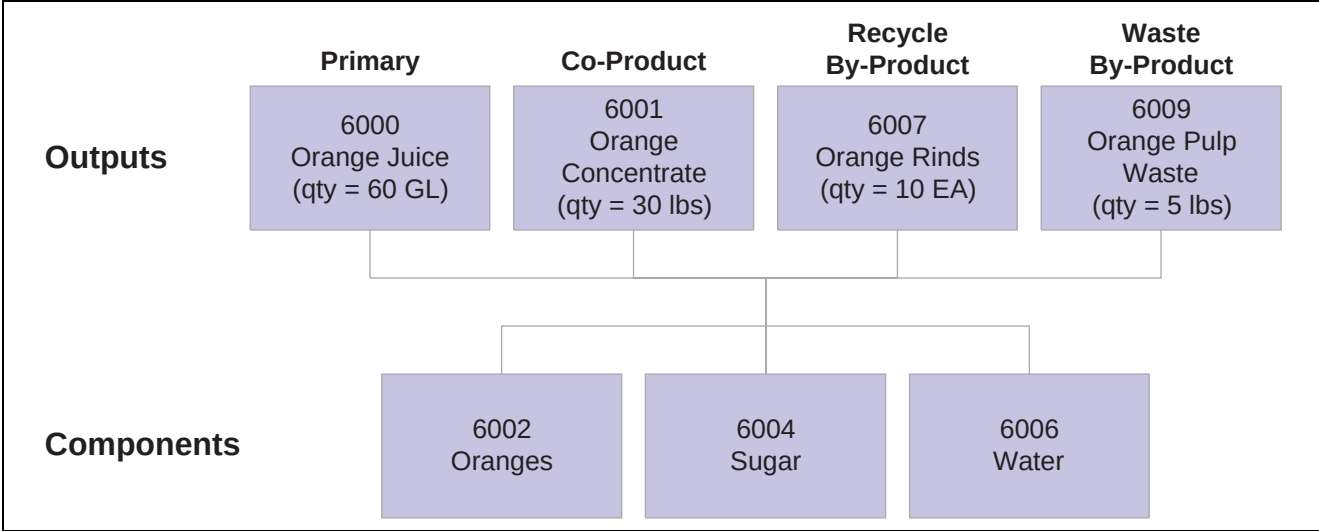
By having two percentages, the resource allocation and cost can be distributed differently for each co-product.

Note. You cannot set the Res% or Cost% fields to 0.

Resource Allocation Percentage Example

In this BOM structure, the primary output (6000) quantity equals 60GL and co-product (6001) quantity equals 30 pounds. The resource allocation percentage for the primary and co-product does not need to be proportional to the output quantity, and can be set to any percentage, as long as it totals 100 percent.

For this structure, the percentages are set to 60 percent for item 6000 and 40 percent for Item 6001.



Example of Multiple BOM Outputs and Resource Allocation Percentages

Effect of Resource Allocation Percentages during Completions

When recording completions for co-products, the system uses the resource allocation percentage to determine what proportion of the batch quantity is consumed. For example, if you did a partial completion of 15 pounds of Item 6001, the proportion of the batch quantity completed would be:

$(15/30) \times (40\%) = 20\%$ of the batch.

This would translate into a consumption of 20 percent of components, earned labor hours, and other related production costs. The system also uses the resource percentage to show on BOM inquiries how much material each output uses when exploding down the levels.

The resource allocation percentage enables the outputs to be in different units of measure because the percentage specifies the relationship between the co-products, the primary, and the batch quantity.

Note. For each type of percentage, the total of all primary/co-product percentages must add up to 100 percent. For a single primary item (no co-products), both of these percentages are set to 100.

Defining Vendor Access Lists

Access the Vendor Access List page.

Vendors Associated with BOM

Displays all vendors that have been granted access to the specific item and its associated BOM.

BOM Access by Vendor	Click to access the BOM Access by Vendor page.
Send Email to Vendors	Click to send electronic mail. The email will contain two URLs. One URL sends the recipient to the Manufacturing BOMs - Summary page in PeopleSoft Manufacturing, and the other URL sends the recipient to the Bill of Material inquiry page in PeopleSoft Engineering.

Sending Email to Vendors

Access the Send Email to Vendors - New Message page.

Email Message

To: peoplesoft@peoplesoft.com

cc:

bcc:

Email Subject: Bill of Material SR2001

Message: To view this Bill of Material, visit:
http://adas0101.peoplesoft.com/psp/mg880dvl/SUPPLIER/ERP/c/ROLE_VENDOR.EN_IC_BOM_INQ.GBL?Action=U&BUSINESS_UNIT=US008&INV_ITEM_ID=SR2001&BOM_STATE=PR&BOM_TYPE=PR&BOM_CODE=1
 or click on the link below if you are an internal PeopleSoft user:
http://adas0101.peoplesoft.com/psp/mg880dvl/EMPLOYEE/ERP/c/MAINTAIN_BOMS_AND

Send **Cancel**

Send Email to Vendors page

If you have PeopleSoft Engineering installed, the default vendor email address appears in the To field. The email will be sent to all vendors who have access to the affected item, in the case of ECRs and ECOs, and to the item itself, in the case of BOMs and EBOMs. Of course, you have the option to delete any email addresses.

Next, enter standard recipient email information in the cc, bcc, and Email Subject fields.

If you have both PeopleSoft Manufacturing and PeopleSoft Engineering installed, all email fields provide the recipient with two URLs. In many cases, one is a URL to the page from which the email was sent, and the other is to a parallel page.

If you do not have PeopleSoft Engineering installed, the system provides only one URL for the PeopleSoft Manufacturing pages.

This table displays each page from which you can send email notification. It also displays the URL destinations provided to the recipient. If PeopleSoft Engineering is not installed, you cannot send email from a PeopleSoft Engineering or receive a PeopleSoft Engineering URL destination.

Page From Which Email Is Sent	URL Destination Page
Bill of Material inquiry in PeopleSoft Engineering	Bill of Material inquiry in PeopleSoft Engineering Manufacturing BOMs- Summary in PeopleSoft Manufacturing (if the BOM is a manufacturing BOM) or Engineering Manufacturing BOMs- Summary in PeopleSoft Engineering (if the BOM is an EBOM)
Change Request Detail in PeopleSoft Engineering	Change Request Detail in PeopleSoft Engineering ECR Maintenance - Header in PeopleSoft Engineering
Change Order Detail in PeopleSoft Engineering	Change Order Detail in PeopleSoft Engineering ECO Maintenance - Header in PeopleSoft Engineering
ECO Maintenance - Header in PeopleSoft Engineering	ECO Maintenance - Header in PeopleSoft Engineering Change Order Detail in PeopleSoft Engineering
ECR Maintenance - Header in PeopleSoft Engineering	ECR Maintenance - Header in PeopleSoft Engineering Change Request Detail in PeopleSoft Engineering
Approve ECO in PeopleSoft Engineering	Change Order Detail in PeopleSoft Engineering ECO Maintenance - Header in PeopleSoft Engineering
Manufacturing BOMs- Header: Vendor Access List page in PeopleSoft Manufacturing	Engineering Manufacturing BOMs- Summary page in PeopleSoft Engineering Bill of Material inquiry in PeopleSoft Engineering
Engineering Manufacturing BOMs- Header: Vendor Access List page in PeopleSoft Engineering	Manufacturing BOMs- Summary page in PeopleSoft Manufacturing Bill of Material inquiry in PeopleSoft Engineering

Note. The sender of any email always has the option to edit to whom the message is sent and to edit the URLs that are sent. Also, even though they are given the URL, all recipients need to have the correct privileges to access the system.

Maintaining BOM Component Details

Access the Components - Component Details page.

Summary		Header		Components	
Component Details Text Attachments Documents Reference Designators Dimensions Substitutes					
Unit:	US008		Verify BOM ☐		
Item ID:	ECO	SR2001	Gear Subassembly		
BOM Type:	Production		BOM Code:	1	Serial Control: N
BOM Qty:	1		Std UOM:	EA	Source Code: Make
Sort Options: Component v					
Component Find View All First ◀ 1 of 9 ▶ Last					
*Component ID: GR8000 🔍 📄					
Gear, Sugishita					
Op Seq:	50 🔍	Quantity:	1.0000	Std UOM:	EA
Eff Rev:	A 🔍	Calc Quantity:	1.0000000000	Source Cd:	Buy
Obs Rev:	---- 🔍	*Per:	Asy v	☐ Subcontract Supply ☐ Non-Owned Item ☒ Teardown ☐ Phantom Item ☐ Serial Control	
Pos:	0	*Yield:	100.0000		
*Incr Consumption:	None v	Offset:			
ECO Number:					

Manufacturing BOMs - Components - Component Details page

Note. When adding a component with item status of *Hold* or *Discontinue*, you will receive a warning message. Similarly, when updating components with item status of *Hold* or *Discontinue*, you will receive a warning message at Save time. In both cases, the warning message will not, however, prevent you from performing the action.

Sort Options

Select how you want to view components. Values are:

- *Component*
- *Effectivity*
- *Op Sequence* (operation sequence)
- *Position Number*

Comp Rev (component revision), **BOM Qty** (BOM quantity), **Op Seq** (operation sequence), **Eff Date** (effective date) or **Eff Rev** (effective revision), **Obs Date** (obsolete date) or **Obs Rev** (obsolete revision), and **Quantity**

These defaults come from the BOM Summary page, but you can change the values here at the component level.

Note. If a component itself is a revision-controlled assembly, you can't enter a revision for the item. The column is not accessible, and the current revision will always be used. This ensures consistency with PeopleSoft Cost Management and PeopleSoft Supply Planning which use the current assembly revision when exploding assemblies.

Pos (position)

This optional numeric field indicates a position number. This can be a number you want to associate with a component on a BOM drawing or on a list of all components on a BOM.

Per

Select either *Asy* (assembly) or *Ord* (order).

In the quantity field, if you set the quantity Per to *Asy*, then when the system determines component requirements in PeopleSoft Supply Planning, it divides the quantity Per by the BOM quantity and multiplies that result by the demand or order quantity.

If you set quantity Per to *Ord*, the system uses the quantity Per regardless of the demand quantity or order size. In other words, a quantity per order (QPO) is a fixed amount, regardless of the order size. So if your QPO is 100, then regardless if your order size is 1 or 500, the quantity issued to production would be 100 in both cases.

Note. Quantity Per assembly may be different for original items and their substitutes.

QPA

PeopleSoft Manufacturing supports a calculated QPA precision rounded from 4 to 10 places: the calculated QPA is displayed next to the Quantity field. Calculated QPA is determined as (Component QPA / BOM Qty). So, for example, if a calculated QPA results in 6.54321, and the installation rounding precision is set to 4 places, the system will recognize this as 6.5432.

Phantom Item and Serial Control

These display-only fields are the defaults from the PeopleSoft Inventory item definition.

Yield

Enter a value; the default is *100*.

Component yield is the expected percentage of usable components within a batch of components issued to production. If you know that components can be damaged during the issuing or assembly process, you can account for that loss here. A 100 percent yield assumes that the entire quantity of the component will be usable and none will be scrapped. A yield of 90 percent assumes that 10 percent of the component issued will be unusable or scrapped.

The system considers component yield in the PeopleSoft Supply Planning, and PeopleSoft Cost Management process. For PeopleSoft Supply Planning, it inflates component requirements to account for the expected loss during the assembly process. When scheduling the number of components to be used in production, the system divides the required quantity by the component yield value to derive the scheduled quantity.

For example, if an assembly has a demand of 100 units, and the quantity per assembly is 1 with a component yield of 90 percent, then planning requires 111 components (100/.90). If the expected 10 percent yield loss occurs, 11 components (111x.10) will be unusable, leaving you with the original required 100 components. When calculating the cost of the assembly, the system includes the component yield loss, thereby increasing the cost contribution of the component.

Note. The system doesn't support component yield for components expressed in quantity per order.

ECO Number

This display-only field indicates that the BOM was updated using the PeopleSoft Engineering BOM Mass Maintenance by ECO (ENPMMAIN) process.

The number displayed is the last ECO number that updated the component on the BOM. If no ECO has been run against this component on this BOM, this field is blank.

Subcontracting

PeopleSoft Manufacturing can handle all subcontracting and non-subcontracting scenarios, including those in which:

- You do your manufacturing in-house, and you are supplying all components.
- A subcontractor supplies some of the components, where outside processing is performed.
- Your customer supplies some of the components, and you are the subcontractor.

Occasionally, you may want to maintain the full product structure of the assembly item, even though you aren't providing all the components necessary to manufacture the item.

Subcontract Supply

Select this check box if an outside vendor supplies part of your manufacturing process and the component is supplied by the outside vendor.

Non-Owned Item

Select this check box if you don't own the component, and you want to indicate that your customer supplies the component.

In a typical scenario, you send a partially completed assembly to a subcontractor who then adds a component and returns the altered assembly. This has planning, production, and costing implications. When exploding demand for components stemming from an assembly requirement, the system doesn't include subcontracted supplied components. Scheduling components for production also excludes subcontracted supplied components. These subcontracted components are not included in the production picking plan or issued to a WIP location storage area. For the purposes of costing, subcontracted supplied components aren't included in the assembly cost.

Here's a table describing the meaning of Subcontractor Supply and Non-Owned Item field combinations:

Subcontractor Supply/Non-Owned Item Settings	Meaning of Combined Settings
Subcontract Supply and Non-Owned Item are both selected	A subcontractor supplies the component.
Subcontract Supply isn't selected and Non-Owned Item is selected	You are the subcontractor and your customer supplies the component.
Subcontract Supply and Non-Owned Item are both not selected	You supply the component.
Subcontract Supply is selected and Non-Owned Item isn't selected	Not a valid combination

Teardown

Select this check box to indicate whether the component could be a potential output from a teardown order.

When you select the check box, the system designates the component as a teardown output. If you don't select the check box, this indicates the component won't be an output of a torn-down assembly.

The Teardown check box applies only to teardown orders.

When you create a teardown order based on a BOM for this item, the system copies the teardown components on the BOM to the teardown output list when released to production. This enables the system to keep teardown outputs in sync with component changes on the Manufacturing BOM.

However, the Teardown check box on the BOM is also copied down to the component list for regular production IDs (as the original production ID) so that if you tear down based on an original production ID the system can determine which components should be considered outputs. The Teardown check box on the component list on the original production ID determines the structure of the teardown output list for the Teardown production ID.

If you selected the Default Teardown BOM Component option on the Manufacturing Business Unit Options page, the system designates all components as teardown outputs on all BOMs for all items for the business unit. For all items where this default is in place, the system selects the Teardown check box when adding a component to a BOM.

Teardown components can't be subcontractor-supplied since those components aren't tracked within PeopleSoft Manufacturing.

Note. Only items with a source code of Make or Buy can be teardown components.

See Also

[Chapter 8, "Maintaining Bills of Material," Maintaining BOM Summaries, page 163](#)

[Chapter 3, "Defining Your Business Unit Structure," Setting Up Manufacturing Business Unit Options, page 34](#)

Adding Reference Designators

Access the Components - Reference Designators page.

Reference Designators

You can associate an unlimited number of reference designators to a component of an assembly item. The designator is any alphanumeric code you can use to determine where a component is placed in an assembly. The electronic industry often uses reference designators for positioning components on circuit boards.

Enter a reference designator up to 20 characters long. You can use it in relation to quantity per assembly. For example, if five pegs need to go into a board, you can give each its own reference designation to aid in positioning.

Adding Component Dimensions

Access the Components - Dimensions page.

Production Specifications These default values come from the item definition within PeopleSoft Inventory, but you can change them for the component.

Adding Substitute Components

Access the Component - Substitutes page.

SummaryHeaderComponent

Component DetailsTextAttachmentsDocumentsReference DesignatorsDimensionsSubstitutes

Unit:US008Verify BOM

Item ID:ECO8R2001Gear Subassembly

BOM Type:ProductionBOM Code:1Serial Control:N

BOM Qty:1Std UOM:EASource Code:Make

ComponentFindView AllFirst1 of 9Last

*Component ID:GR8000Std UOM:EASource Cd:Buy

Gear, Sugishita

Op Seq:50Eff Rev:AObs Rev:Pos:0

Substitute ItemsCustomizeFindView AllFirst1 of 1Last

*Priority	*Substitute Item ID	Description	*From Date	*To Date	Rate	Std UOM
1	GR8001	Gear, Campani	01/01/2000	12/31/2099	1.00000000	EA

Manufacturing BOMs - Components: Substitutes page

Substitute Item ID	Select the component that you want to add.
	Substitute items must be unique for the item. You cannot enter the same item twice as a substitute with different dates.
	For example, Substitute A with effective dates from 01/01/99 to 02/01/99 and Substitute A with effective dates from 02/01/00 to 08/30/00 could not be substitutes for the same item.
	In this example, you would need to define a different substitute for the second set of effective dates.
Priority, conversion Rate, From Date, and To Date	Enter values for the new component being added.
Std UOM (standard unit of measure)	Can be different for the substitute and the original component.
Note. A substitute item cannot be a phantom or a component of a phantom. Also, where substitutes exist, the item cannot be changed to a phantom.	

Note. If no substitute items are defined for an item that has been designated as Discontinued, there may be a shortage of that item if demand exceeds the existing quantity on hand. If a substitute has been defined for that item, PeopleSoft automatically selects the substitute when the quantity on hand for the discontinued item runs out.

Copying Business Unit Substitute Items

Access the Copy Business Unit Substitute Items page.

OK and Yes

Click to copy business unit level substitutes to the BOM level.

Note. Changes to the BOM maintenance substitute list in PeopleSoft Planning will not be transferred back to the transaction system.

Copying and Deleting Bills of Material

You can copy and delete BOMs. If different items have similar structures, you can copy the structure of one item to another within the same business unit. During the copying process, you can include or exclude certain components and substitutes. Using Manufacturing BOMs pages, you can then change the new structure as needed.

Pages Used to Copy and Delete BOMs

Page Name	Object Name	Navigation	Usage
Copy BOM	EN_BOM_COPY	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Copy Manufacturing BOMs, Copy BOM	Copy BOMs from one business unit and item ID combination to another.
Copy BOM Detail	EN_BOM_COPY_DET	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Copy Manufacturing BOMs, Copy BOM, Copy BOM Detail	View more details of the BOM you are copying.
Copy Outputs	EN_BOM_COPY_OUT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Copy Manufacturing BOMs, Copy BOM Outputs	Copy output rows from the source BOM to the target BOM.
Delete BOMs	EN_BOM_DELETE	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Delete Manufacturing BOMs, Delete BOMs	Delete BOMs for assembly or end items.

Copying BOMs

Access the Copy BOM page.

Copy BOM

Copy BOM Detail

Copy Outputs

Source BOM

*Unit:

US008

Search

*Item ID:

MT2000

Professional Road Bike, Womans

*BOM Type:

Production

Std UOM: EA

BOM Code:

1

Eff Rev: -----

☒ All Dates/Revs

Eff Date:

01/01/1900

Target BOM (BOM2)

*Unit:

US008

Mountain Bike, Womans

Edit BOM

*Item ID:

MT3000

BOM Code:

1

Std UOM: EA

Component Details

Customize | Find | View All | First 1-5 of 13 Last

Copy	Copy Sub	Component ID	Description	Comp Rev	Op Seq	Pos Nbr	Effective	Obsolete
☒	☐	FR7002	Bike Frame, Aluminium		10		01/01/1985	12/31/2099
☒	☐	FR7005	Front Fork	BB	10		01/01/1985	12/31/2099
☒	☐	FR7012	Primer Paint		40		01/01/1985	12/31/2099
☒	☐	FS3000	Bolt		10		01/01/1985	12/31/2099
☒	☐	FS3001	Washer		10		01/01/1985	12/31/2099

Copy BOM page

Source BOM

Unit, Item ID, BOM Code,, Enter values for the BOM you want to copy.
and **Eff Date** (effective date) or **Eff Rev** (effective revision)

BOM Type

Note. The BOM Type of the Target BOM and the Source BOM must be the same and is therefore not entered in the Target BOM group box.

All Dates/Revs

Select if you want to copy all dates and revisions for the BOM.

Search

Click to retrieve the source BOM.

Target BOM (BOM2)

Unit, Item ID, and BOM Code

Enter values for the target BOM. The item must be a valid *Make* or *Buy* item in the target business unit.

You cannot copy a BOM to a floor stock or expensed item.

You have the option of also copying assembly and component text, documents, and attachments: copy attachments with the Copy Engineering BOM Detail page.

If you are copying a source assembly or end item that's revision-controlled to a target that is a non-revision-controlled item, then the system uses the

source component's revision effectivity dates to determine the effective and obsolete dates of the target item's components.

The target BOM is also updated with any component revisions specified on the source BOM.

Edit BOM

Once you click Save, the system activates this button.

Click the Edit BOM button to transfer to the BOM Summary page where you can edit the attributes on the Target BOM.

Note. You can't copy a BOM to a target business unit and item ID if the assembly item or any of its components is not defined in the target business unit. If one or more components don't exist in the target business unit, you can clear the copy check boxes and add the balance of the BOM. You can then add the missing components in the target business unit and use the Manufacturing BOMs pages to complete the BOM structure.

If the specific BOM already exists at the target business unit, you are prompted to overwrite the existing BOM with the information you are currently copying. If you overwrite the existing BOM, the BOM in the target business unit is deleted and the source BOM is added.

Note. You can't copy a BOM to itself.

Component Details

Copy

Select this check box to select specific components to copy to the Target BOM.

If you uncheck this check box, you can exclude any specific component row from being copied.

If the component is revision-controlled, you can also exclude any specific component and revision combination from being copied.

Copy Sub (copy substitutes) Select this check box to copy specific substitutes.

Copying BOM Detail

Access the Copy BOM Detail page.

Copy BOM
Copy BOM Detail
Copy Outputs

Target BOM (BOM2)
Unit: US008 BOM Code: 1 Edit BOM
Item ID: MT3000 Mountain Bike, Womans Std UOM: EA

☒ Copy Assembly Text ☒ Copy Assembly Att ☒ Copy Assembly Docs
☒ Copy Component Text ☒ Copy Component Att ☒ Copy Component Docs
View Source Same as Except: Apply
View Target

Component Details Customize | Find | View All | First ◀ 1-4 of 13 ▶ Last

Copy	Copy Sub	Component ID	Description	Comp Rev	Op Seq	Pos Nbr	Effective	Obsolete
☒	☐	FR7002	Bike Frame, Aluminium		10		01/01/1985	12/31/2099
☒	☐	FR7005	Front Fork	BB	10		01/01/1985	12/31/2099
☒	☐	FR7012	Primer Paint		40		01/01/1985	12/31/2099
☒	☐	FS3000	Bolt		10		01/01/1985	12/31/2099

Copy BOM - Copy BOM Detail page

Target BOM (BOM2)

You can select to copy assembly text attachments and documents as well as copy component text, attachments, and documents.

Note. You can copy documents only if you've selected the identical Item IDs for both the Source BOM and Target BOM.

View Source

Displays what you are copying and the copying choices you've made.

View Target

Displays what the BOM will look like after the copy.

Same as Except

Indicates how you want the BOM copied. Values include:

- *Exclude All:* System copies no components to the target BOM.
- *Exclude Item Range:* Fields appear so that you can enter a range of component IDs or position numbers that the system won't copy.
- *Exclude Pos Range* (exclude position range): Fields appear so that you can enter a range of component IDs or position numbers that the system won't copy.
- *Include All:* System marks all components on the Source BOM to be copied.
- *Include Date Range*
- *Include Item Range:* Works like the exclude feature except that you enter the range of items or position numbers that you want to copy.
- *Include Pos Range* (include position range): Works like the exclude feature except that you enter the range of items or position numbers that you want to copy.

- *Include Revision Range*: Enable you to copy all components that are in effect between the specified dates or revisions.
- *Include Date Range* and *Include Revision Range*
- If you want to exclude a range of dates or revisions, select *Exclude All* and then include portions (by revision and date).

You can use the Same as Except options in any combination. For example, you can initially select *Exclude All*, click Apply, and then select *Include Item Range* to copy only those items that fall within the range.

- You can also select *Include Item Range* or *Exclude Item Range* multiple times and click Apply after each selection to include or exclude chunks of items. The effect is cumulative, not exclusive.

You can still clear a specific component's Copy check box or choose Exclude All to clear all the check boxes.

Apply Click once after you've selected your Same as Except options.

Copy Select a component's check box to select specific components or component revisions.

Copy Sub (copy substitutes) Select this check box to copy specific substitutes to the Target BOM.

Engineering Considerations - Transferring BOMs

If you have PeopleSoft Engineering installed, you also have the option to transfer multiple BOMs immediately from PeopleSoft Engineering to PeopleSoft Manufacturing or from PeopleSoft Manufacturing to PeopleSoft Engineering.

See Also

PeopleSoft Engineering 8.8 PeopleBook, "Processing ECRs and ECOs," Transferring BOMs and Routings

Copying BOM Outputs

Access the Copy BOM Detail page.

Copy Select this check box to designate that you want an output row to be copied from the source BOM to the target BOM.

The primary item and co-products are always copied along with the Output Qty (output quantity), Res %, (resource allocation percentage), and Cost % (cost allocation percentage).

Deleting BOMs

Access the Delete BOMs page.

Unit, From Item ID, To Item ID, and BOM Type Enter values for the BOMs you'd like to delete.

BOM Code	Enter a value in this field if you want to delete only a specific BOM code. If you leave the field blank, then all BOMs for the item are retrieved.
Search	Click to display the list of production or rework BOMs for the assembly items you are deleting.
	Click the Select All button to select each Delete? check box. Use this option to include or exclude assemblies you want to delete.
	Click the Deselect All button to clear each Delete? check box. For each assembly, the system deletes all BOM components, regardless of effectivity date or revision. All assembly BOMs scheduled for deletion will have header, outputs, related text, attachments, components, and reference designators deleted. Only the BOM codes with the Delete? check box selected will be deleted. The system will display an error message if you try to delete a BOM code that's part of a production option. The Delete BOMs process checks and warns you if the BOM is used in a production area or if you have production in the <i>Entered</i> status: that is, when production is planned but a BOM and routing have not yet been frozen for production.

Note. Since the system copies BOMs to production, deleting a BOM has no impact on *Firmed* or *Released* production.

Verifying Bills of Material

If BOMs are poorly designed, they can contain unwanted loops. A looping bill is created when an assembly has itself as a component of one of its subassemblies. To locate these infinite loops in your product structures, we recommend that you regularly run BOM verification.

You can also use Online BOM Verification to check for looping BOMs. You set this option at the manufacturing business unit level with the MFG Business Unit Options page.

However, to improve BOM maintenance performance when BOMs are complex and deep, we recommend that you use this scheduled verification process and set Online BOM Verification to Never Verify Online.

Pages Used to Verify BOMs

Page Name	Object Name	Navigation	Usage
BOM Verification	EN_BOM_VERIFY_REQ	Manufacturing Definitions, BOMs and Revisions, Identify Looping BOMs, BOM Looping Verification, BOM Verification	Locate unwanted loops in BOMs.
Delete BOM Verification Rows	EN_BOM_VERIF_DEL	Manufacturing Definitions, BOMs and Revisions, Identify Looping BOMs, Delete BOM Verification Details, Delete BOM Verification Rows	Delete records created by the BOM Verification Request.

Running the BOM Verification Process for Looping BOMs

Access the BOM Verification page.

All Dates/Revs (all dates and revisions) Select this check box if you want to verify all dates and revisions of the BOM.

BOM Code Enter the priority code of the BOM you want to verify.

Depth Enter a value to specify how many levels you want to verify.

Delete Rows, If No Errors Select this check box to delete unnecessary BOM explosion table records. The verification request process adds a series of records to the BOM Explosion table. These records take up space and are of no use if there are no looping BOMs.

You can also use the Delete BOM Verification Rows page to save space.

BOM verification looks at just the primary BOM and routing when exploding at levels greater than 1. If there is more than one way to make a specific co-product output, you need to indicate which BOM is the primary way to make that co-product and, therefore, which BOM to verify for that co-product.

By selecting an Associated Primary BOM in the Define Business Unit Item - Manufacturing: General page, you designate which BOM to verify.

The BOM verification process will now take both co-products and multiple BOM codes into account when checking if loops exist.

Run Click to run this request. Process Scheduler runs the BOM Verification (ENPBEXPV) process at user-defined intervals.

You will receive a message only if the system finds a looping BOM.

View the results of the verification process by using the BOM Verification Status page.

See Also

[Chapter 8, “Maintaining Bills of Material,” Assigning Associated Primary BOMs, page 154](#)

PeopleSoft PeopleTools PeopleBook: Process Scheduler

Deleting BOM Verification Rows

Access the Delete BOM Verification Rows page.

The verification request process adds a series of records to the BOM Explosion table. These records take up space and are of no use if there are no looping BOMs.

Unit and Process Instance	Select values to delete BOM explosion table records. If you want to view all records for the business unit, leave the Process Instance field blank.
Search	Click to retrieve the selected records.
Delete?	Select this check box to indicate which records you’d like to delete.
Save	Click to delete the selected records.

Note. You can also use the Delete? Rows, If No Errors field on the BOM Verification Request page to delete these records.

Defining BOM, ECR, and ECO Access by Vendor

To define access privileges for any vendor if you want them to view BOMs, ECRs, and ECOs, use the Bill of Material Privileges component (EN_IC_BOM_PRIV). Use the EN_IC_BOM_PRIV_CI component interface to load data into the tables for this component.

You must define access privileges for any vendor if you want them to view BOMs, ECRs, and ECOs. After you define the access privileges, associate these privileges with specific business unit items.

Note. You must have PeopleSoft Engineering installed to use this functionality.

For both the Bill of Material Inquiry and the Engineering Change Request, you must use the BOM Access by Vendor page to enable the vendor to access any information.

For ECOs, this page is optional. If a vendor is one of the approvers on a change order, then that change order is automatically made available to that vendor. Vendors can also view any engineering change order or request, if they have been granted access to view at least one of its items affected by the ECO.

Page Used to Define BOM, ECR, and ECO Access Privileges for Vendors

Page Name	Object Name	Navigation	Usage
BOM Access by Vendor (optional if you're using PeopleSoft Engineering)	EN_IC_BOM_PRIV	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, BOM Access by Vendor, BOM Access by Vendor	Define privileges to view BOMs and ECOs, and, in the case of ECRs, to add information. In addition, use this page to associate business unit items to vendors, thereby granting them item access by setID and vendor code.

Defining BOM Access Privileges for Vendors

Access the BOM Access by Vendor page.

Note. You need to define access only for the top-level assembly item, not for each component item row.

Update ECR

Select this check box to grant the vendor the privilege of viewing and creating ECRs. This privilege is associated to the vendor, rather than to a specific item.

The default for this option is that the check box will be unchecked, and the vendor will not see any Add, Upload, Save, and Delete buttons when viewing engineering change requests.

Note. Vendors can change only the ECRs that they have created.

Add ECR Attachment and Add ECO Attachment

Select these check boxes to define whether the vendor will be able to upload documents into ECRs and ECOs.

Selecting these check boxes also enables users to delete ECR and ECO attachments that they have added. While they can delete *ECR* attachments they own during any session, they can delete *ECO* attachments only during the session in which they added them and only before they saved.

Item ID

Select all items that you want to made visible to the specified vendor.

This table outlines what the vendor can access, based on the settings you define with this page:

If This Check Box Is Selected	The Vendor Can	Default Is
View MBOM	View the item MBOM for the specified BOM Type and BOM Code.	Selected
View EBOM	View the item EBOM for the specified BOM Type and BOM Code.	Selected

If This Check Box Is Selected	The Vendor Can	Default Is
View ECR	View the ECR(s) associated with this affected item, including those not specifically entered by the vendor. You can use the Not Accessible by Vendors check box on the ECR Header page to override this setting and block a vendor's access to a specific ECR.	Not Selected
View ECO	View the ECO(s) associated with this affected item, including those not specifically entered by the vendor. You can use the Not Accessible by Vendors check box on the ECO Header page to override this setting and block a vendor's access to a specific ECO.	Not Selected

As an example, if vendor V1 has access to business unit item MT2000, and only View BOM is selected, then vendor V1 can inquire only on the BOM for MT2000 and can't access any other information. When the vendor signs on, only the Bill of Material Inquiry navigation selection is available.

If you've granted the vendor access to view ECRs and ECOs, the navigation selection Engineering Change Order and Engineering Change Request is accessible to the vendor when the vendor signs on. As mentioned in the table, the ECR and ECO maintenance header pages contain a Not Accessible by Vendors check box, which, if selected, blocks access to the specific ECRs and ECOs. Therefore, even if vendors have been granted access with the BOM Access by Vendor page, you can deny them access to specific ECOs or ECRs.

CHAPTER 9

Making Mass BOM Changes

This chapter provides an overview of mass BOM) changes and discusses how to:

- Define BOM mass maintenance codes.
- Make BOM mass changes and create automatic revisions.
- View and correct mass maintenance staged BOMs.
- Process staged BOMs.

Understanding Mass BOM Changes

Production departments need the ability to apply mass maintenance additions and changes directly to BOMs. This functionality is similar to the mass maintenance features in PeopleSoft Engineering, but it is also available in PeopleSoft Manufacturing, because not all changes go through PeopleSoft Engineering.

Note. If you have PeopleSoft Engineering installed, you can use the engineering mass maintenance functionality, including making mass changes to MBOMs or EBOMs by either ECO or mass maintenance code (MMC). This PeopleSoft Manufacturing mass maintenance documentation assumes that you do not have PeopleSoft Engineering installed.

Mass maintenance enables you to apply, in a single MMC process, the same set of changes to many manufacturing BOMs. For example, you can change all occurrences of one component for another or even add components to an assembly. Without this functionality, you must change one BOM at a time. Mass maintenance is a powerful tool that can increase your productivity tremendously.

The BOM mass maintenance code setup page enables you to define an MMC that can later be applied to an assembly range or assembly list. An MMC enables you to define a specific set of component changes such as reference designator and component dimension changes: a component can be added and associated BOM information can be changed. The MMC enables you to designate that specific multiple output values are to be changed or added. You can even designate that automatic revisions are to be generated for revision-controlled items. There is also an inquiry that enables you to view all BOM mass maintenance exceptions.

Note. In addition to generating mass maintenance changes to BOMs, the mass maintenance process enables you to create new revision numbers automatically, based on a revision scheme that you define for the business unit.

See Also

PeopleSoft Engineering 8.8 PeopleBook, “Making Mass Engineering BOM Changes”

Defining BOM Mass Maintenance Codes

To define manufacturing BOM mass maintenance codes, use the BOM Mass Maintenance component.

This section provides an overview of BOM mass maintenance codes and discusses how to:

- Identify specific BOMs for change.
- View assembly and component matches.
- Enter reference designator search criteria.
- Enter substitute item search criteria.
- Change components.
- Enter component dimensions change criteria.
- Enter component reference designator change criteria.
- Enter component substitute change criteria.
- Add components.
- Enter component substitute add criteria.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Defining Additional Common Information

Chapter 2, “Understanding PeopleSoft Manufacturing,” Quantity Rounding Exceptions in PeopleSoft Manufacturing, page 29

Understanding BOM Mass Maintenance Codes

Use the BOM Mass Maintenance pages to create and maintain BOM mass maintenance codes. These pages enable you to specify multiple BOM component or output changes and additions, including substitute items. A MMC consists of search pages, which allow you to identify existing components that are to be impacted, Change pages that allow you to change instances of those specific components on specific BOMs, and add pages that allow for the introduction of new components and detail information. After you’ve used these pages to define MMC codes, you can implement the changes directly, using the Process BOM Mass Maintenance by MMC page.

Note. To maintain components en masse for revision-controlled BOMs, enter effective and obsolete dates for the revision on these pages, regardless of whether the revision is controlled by revision name or effectivity date.

Prior to accessing any MMC pages, you must select a business unit and a MMC. The MMC value can be generated automatically.

Important! Any MMCs created in PeopleSoft Manufacturing are available only in manufacturing, and MMCs created in PeopleSoft Engineering are available only in engineering.

Note. To provide greater flexibility when defining MBOMs, the Quantity field does not need to follow the quantity precision rules defined for the item. A warning is issued if you define a decimal quantity value for an item whose quantity precision value is a whole number. This is an example of when you may need the quantity precision flexibility. If 1 B0004 component is required to make 2 assembly A0001s, then when defining the BOM, the QPA for B0004 would be 0.5. If you applied the rounding rules to the QPA, then it would round the QPA for B0004 to 1, and thereby inflate the production costs.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Defining Additional Common Information

Prerequisites

Prior to making BOM mass maintenance changes, define:

- The appropriate assemblies and BOMs.
- Any revision-controlled items with automatic revisions if you plan to create automatic revisions.

Pages Used to Define BOM Mass Maintenance Codes

Page Name	Object Name	Navigation	Usage
Search	EN_BOM_MMC_SRCH	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes	Identify the specific existing outputs or components to change. Specifying components also enables you to identify the BOMs that are impacted.
Search - Dimensions	EN_BOM_MMC_DIM_	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Search Click the Dimensions link.	Enter component dimension search criteria.
Search - Reference Designator	EN_BOM_MMC_REF_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Search Click the Ref Desigs link.	Enter reference designator search criteria.
Search - Substitutes	EN_BOM_MMC_SUB_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Search Click the Substitutes link.	Search for substitutes everywhere they are used.

Page Name	Object Name	Navigation	Usage
Manufacturing Assembly/Component Matches	EN_BOM_MMC_VW_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Search Click the Matches link.	This display-only page allows you to view the number of assemblies that match the search criteria that you have entered and view matching BOMs.
Change	EN_BOM_MMC_NEW	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Change	Specify new component values, once you have selected the set of components that you want to change on the Search page.
Change - Dimensions	EN_BOM_MMC_DIM2_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Change Click the Dimensions link.	Make mass changes to component dimensions.
Change - Reference Designators	EN_BOM_MMC_REF2_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Change Click the Ref Desigs link.	Make mass changes to reference designators.
Change - Substitutes	EN_BOM_MMC_SUB2_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Change Click the Substitutes link.	Mass change a substitute everywhere it's used.
Add	EN_BOM_MMC_ADD	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Add	Add components or outputs to assemblies. The system adds these components or outputs to each BOM identified by the values that you entered on the Search page. Use the Process BOM Mass Maintenance pages to designate, at a later time, the specific assemblies to be affected by these changes.
Add - Dimensions	EN_BOM_MMC_DIM3_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Add Click the Dimensions link.	Add component dimensions, if you are adding using the <i>Component</i> sequence type.
Add - Reference Designators	EN_BOM_MMC_REF3_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Add Click the Ref Desigs link.	Add reference designators, if you are adding using the <i>Component</i> sequence type.

Page Name	Object Name	Navigation	Usage
Add - Substitutes	EN_BOM_MMC_SUB3_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, BOM Mass Maintenance Codes, Add Click the Substitutes link.	Add a substitute everywhere it's required.

Identifying Specific BOMs for Change

Access the Search page.

Search | **Change** | **Add**

Unit: US008 ☐ Auto Revision

Mass Maint Code: MMC0000003 *Description: Change Component

Mass Maintenance Sequence Find | View All First 1 of 1 Last

*Mass Maint Seq: 10 *Descr: Change Component

*Sequence Type: Component Matches

Where Search Values Are Find | View All First 1 of 1 Last

Component ID: PS1004 Pedal, Deluxe

Comp Rev: Op Seq: Pos:

Eff Date: Quantity: Sub Supply:

Obs Date: Per: Non-Owned:

Search Seq: 1 Yield: Teardown:

☒ Update Flag Dimensions Ref Desigs Substitutes

BOM Mass Maintenance Code - Search page

Before you associate any changes or additions to an MMC, you can use the Search page to identify which specific outputs, components, or component revisions to change on the BOM.

When adding components, use the Search page to further identify the BOMs to which the new component should be added. For example, you may want to add component ID LT5001 only on BOMs that already have a component ID called LT5000 and a 12/31/97 obsolete date or perhaps where you already have component ID LT5000 and LT5001 defined. Similarly, you can use the Search page to further identify to which BOMs the new output should be added.

Note. On these pages, the fields that appear vary, depending on your choice of values in the required Sequence Type field. The page examples that you see are based on the value *Component* having been selected in the Sequence Type field. However, if you select *Output*, the system doesn't display the component ID, component revision, quantity, yield, position, if the item is supplied by a subcontractor, if the item is non-owned, or if it is a teardown item. It also does not display the dimensions, reference designators, and substitutes. Instead, it displays the output item, output type, output quantity, resource allocation percentage, and cost allocation percentage fields.

Auto Revision

Select this check box to apply schemes for this mass maintenance code that automatically update revisions when a change event occurs. You actually generate the automatic revisions when you run the mass maintenance functionality.

Mass Maint Seq (mass maintenance sequence) and **Descr** (description)

Enter a mass maintenance sequence number and its description. The mass maintenance sequence number enables you to set up more than one set of changes for a single mass maintenance code. The sequence number determines the order in which the changes are applied.

Note. The maximum number of sequence numbers that you can enter for a specific mass maintenance code is 20.

Sequence Type

Select *Component* or *Output*.

If you select *Component*, enter the component search values. This optionally includes standard BOM fields such as Component ID, Comp Rev (component revision), Op Seq(operation sequence), Eff Date, (effectivity date), Obs Date (obsolete date), and quantity Per. The system searches for values that meet, at the same time, all of the criteria that you enter.

Note. The effective date and obsolete date that you enter indicates the precise date on which the component becomes effective or obsolete on the BOM.

If you select *Output* as your sequence type, then you can, optionally, select the output item and output type. You can also enter an output quantity, resource percentage, and cost allocation percentage.

If you don't want to change a specific component, then leave the Component ID field blank, and select criteria based on the other fields. If you leave any field on the Component Search page blank, the system searches for BOM components without considering the blank search field. For example, if you leave Component ID blank and just enter a yield of 50, then all components with a yield of 50 are selected.

To search for multiple components or outputs within a sequence, use the Where Search Values Are group box to enter "and" searches for more than one component or output on a BOM.

Update Flag

While searching for BOMs that contain multiple components or outputs, you may only want to actually make changes to a subset of all components or outputs.

Select this check box to indicate which components or outputs you want updated by the Mass Maintenance process.

Viewing Manufacturing Assembly and Component Matches

Access the Manufacturing Assembly/Component Matches page.

Manufacturing Assembly/Component Matches

Unit: US008 **Mass Maint Code:** MMC0000003
Mass Maint Seq: 10 **Change Component** **Type:** Component

Manufacturing: 5

Assemblies							
Item ID	Description	BOM Type	BOM Code	Component ID	Comp Rev	Op Seq	Effective Date
MT1000	Pro Road Bike, Childs	Production	1	PS1004		50	01/01/1985
MT1500	Bicycle	Production	1	PS1004		50	01/01/1985
MT2000	Professional Road Bike, Womans	Production	1	PS1004		50	01/01/1985
MT2000	Professional Road Bike, Womans	Production	2	PS1004		50	01/01/1985
SR1002	Carrera 6000 Hi Performance Ro	Production	1	PS1004		30	01/01/1900

Manufacturing Assembly/Component Matches page

Count

Click this button to view the number of assemblies that match the search criteria that you entered. The page displays MBOM totals. These values are the number of MBOMs that will be affected, assuming that you plan to perform mass maintenance processing for all BOMs in the business unit that meet the search criteria. The actual MBOMs to be changed can be determined by assembly list, by range, when the mass maintenance code is applied later.

Note. If you anticipate that a large number of BOMs are going to be affected by the search criteria, click the Count button before attempting to view the BOMs, to avoid viewing too much data online.

View BOMs

Click this button to view manufacturing assembly matches to the criteria that you entered. This display of assembly matches lists the assemblies that can be affected by this mass maintenance sequence. When the mass maintenance code is applied later, this list of assemblies can be further restricted, by supplying a range of assemblies, a specific list of assemblies, or an ECO that contains assemblies with BOM changes.

If you selected *Output* as the sequence type on the Search page, the assembly matches display the output item and output type instead of the component ID.

Entering Reference Designator Search Criteria

Access the Reference Designators - Search page.

For a given sequence, you can search using multiple reference designators. If you enter more than one reference designator, the system searches for BOM components, using a logical “and” between reference designators. To search references designators using an “or” logical, use multiple sequences.

Entering Substitute Items Search Criteria

Access the Component Substitutes - Search page.

You can narrow the search by using all or any combination of the substitute item search criteria.

Sub Item (substitute item) Enter a value to search for a specific component substitute on a BOM.

To search for a specific component substitute with a particular priority, then enter both the sub-item and the priority.

To search for a specific component substitute with a particular conversion rate, enter both the sub-item and the conversion rate.

From Date and To Date Enter values for these fields to narrow the search.

Changing Components

Access the Change page.

SearchChangeAdd

Unit:US008

Mass Maint Code:MMC0000003

Description:Change Component

☐ Auto Revision

Mass Maintenance Sequence

Find | View AllFirst1 of 1Last

Mass Maint Seq:10

Descr:Change Component

Sequence Type:Component

Change Values To

Component ID:PS1004

Op Seq:

Pos:

Comp Rev:

Quantity:

Sub Supply:

Eff Date:

Per:

Non-Owned:

Obs Date:

Schd Date

Yield:

Teardown:

Dimensions

Ref Desigs

Substitutes

BOM Mass Maintenance Code - Change page

Use this page to change values or obsolete the components specified on the Search page.

Component ID Enter a new value if you intend to change the Component ID field.

Note. This would typically be done for correcting BOMs. If you intend to keep the history of a component change, you should leave this field blank.

Output Item and Output Type If you selected *Output*, you can enter the required output change to data on this page. The effectivity dates operate in the same manner as they do for a component sequence type.

Using Automatic Revisions and Effectivity Dates

Eff Date (effective date) and Obs Date (obsolete date)	These values determine the specific effectivity date changes mass maintenance will make to the BOM for the searched components. For example for obsolete components, leave the effective date value blank, and specify an obsolete date or use the second field next to the Obs Date field to derive an obsolete date for the component. In the second field you can select <i>Prior Date</i> or <i>Schd Date</i> for the obsolete date. If you select <i>Schd Date</i> for the effective date, at process time, the system translates this into the process run date.
Obs Date (obsolete date)	Select one of these values: • <i>Prior Date</i>: The day before the schedule date which is the process run date. This is used, for example, to obsolete a component the day before a new component is to take its place. • <i>Schd Date</i> (scheduled date): This date varies, depending on whether you selected the Auto Revision check box on the Search page. If revisions aren't automatically incremented, the schedule date is the run date of the process. This for example can be used to make a component obsolete on the run date when there is no component to take its place. If revisions are being automatically incremented, the obsolete date will have the obsolete date of the newly created revision.
Auto Revision	If this check box is selected, and you specify the schedule date for both the effective date and the obsolete date. The system displays a warning that the component will be effective for only one day.

Note. You can enter only one effective date. Therefore, if you specify a calendar date and then select *Schd Date*, the system clears the calendar date. Similarly, if you select a *Schd Date* and then enter a calendar date, the system clears the scheduled date. The Obs Date fields operate in the same manner.

This table lists the automatic revision impact that the second set of Eff Date and Obs Date fields have on both the revisions and the dates reflected on the BOMs. This example applies only to items that have been defined as revision-controlled on the Define Business Unit Item - Manufacturing: General page. Also, there is an example of how the dates will change on the BOM if the schedule date is 06/15/03 and the newly created revision is the latest revision for the item.

Change Obsolete Date to	None	Scheduled Date	Prior Date
When Effective Date = None	Creates new automatic revision. There is no BOM component effectivity date change. Example: Both of the dates in the Eff Date and Obs Date fields are unchanged.	Creates new automatic revision. The system changes the obsolete date on the selected BOMs to the obsolete date of the newly added automatic revision. Example: The value in the Eff Date field is unchanged; the value in the Obs Date field is 12/31/2099. (The obsolete date of the new revision added on 6/15/03).	Creates new automatic revision. The system changes the obsolete date on the selected BOMs to the obsolete date of the revision just prior to the newly added automatic revision. Example: The value in the Eff Date field is unchanged; the field value in the Obs Date field is 06/14/03 (one day before new revision is active).
When Effective Date = Schd Date	Creates new automatic revision. The system changes the effective date of the BOM. Example: The value in the Eff Date field is 06/15/03. (This is the start date of new revision.) The obsolete date is unchanged.	Creates new automatic revision. The system changes the BOM effective date to the Mass Maintenance Code process run date. The system changes the obsolete date on the selected BOMs to the obsolete date of the new revision. Example: The value of the Eff Date field is 06/15/03. (This is the start date of new revision.) The value in the Obs Date field is 12/31/2099.	This combination is not allowed, because it would cause the effective date of the component to be after the due date. You must select another combination.

As you can see from this table, with the exception of the schedule date and prior date combination, all scenarios are valid and lead to the automatic generation of revisions for revision control and automatic revision items.

This table lists items that have *not* been defined as using automatic revisions.

Change Obsolete Date to	None	Scheduled Date	Prior Date
When Effective Date = None	There is no component effective date mass change. Example: Both of the dates in the Eff Date and Obs Date fields are unchanged.	The system changes the obsolete date on the selected BOMs to the Mass Maintenance Code process run date. Example: The value of the Eff Date field is unchanged; the value of the Obs Date field is 06/15/03.	The system changes the obsolete date on the selected BOMs to the date prior to the Mass Maintenance Code process run date. Example: The value in the Eff Date field is unchanged; the value in the Obs Date field is 06/14/03.
When Effective Date = Schd Date	The system changes the BOM effective date to the Mass Maintenance Code process run date. Example: The value in the Eff Date field is 06/15/00; the value in the Obs Date field is unchanged.	The system changes the BOM effective date and the obsolete date to the Mass Maintenance Code process run date. Example: The Eff Date field is 06/15/00; the value in the Obs Date field is 06/15/00.	This combination is not allowed. You must select another combination.

Entering Component Dimensions Change Criteria

Access the Component Dimensions - Change page.

Enter the existing dimension on the Component Dimensions - Search page (optional), and then enter a new value on the Component Dimensions - Change page. Both pages are accessed by clicking buttons on the appropriate page. Entering the existing dimension on the Component Dimensions - Search page is necessary only when it needs to be part of the search criteria. For example, to change the weight for all occurrences of component LT5000 to 10, enter 10 on the Change page. If it should be changed only where its current weight is 9, then enter 9 on the Search page and 10 on the Change page.

Entering Component Reference Designator Change Criteria

Access the Reference Designators - Change page.

To add, change, or delete reference designators, specify the reference designators on the Reference Designators - Search page only if it needs to be part of the search criteria.

Otherwise, use the Reference Designators - Change page to specify an Action of *Add*, *Change*, or *Delete*. When adding, specify only the new reference designator; when deleting, specify only the reference designator to be deleted; and when changing, specify the current and new reference designators.

Entering Component Substitute Change Criteria

Access the Component Substitutes - Change page.

Search Change Add		
Unit:	US008	☐ Auto Revision
Mass Maint Code:	MMC0000003	Description: Change Component
Mass Maintenance Sequence Find View All First 1 of 1 Last		
Mass Maint Seq:	10	Descr: Change Component
Sequence Type:	Component	

Component Substitutes - Change page

Action

Select one of these values:

- *Add*
- *Change*
- *Delete*

Adding, changing, and deleting component substitutes works in a similar fashion as the reference designators, except that you have more information to maintain.

If adding a new substitute, specify all the required new values.

If deleting a substitute, specify as many of the current values as necessary to perform the delete. If you are changing substitute information, enter the current and new values.

For example, to delete all occurrences of LT5001 as a substitute, then enter only LT5001 as the substitute item. To delete only the substitute LT5001, if it has priority 1, then enter LT5001 as the substitute item and 1 as the priority.

Current Values**Substitute Item ID**

This is the current default value that comes from the business unit.

Priority, Conversion Rate, From Date, and To Date

If deleting a substitute, specify as many of the current values to perform the deletion.

For example, to delete all occurrences of LT5001 as a substitute, then only enter LT5001 as the substitute item ID.

If you only want to delete the substitute LT5001 if it has priority 1, then enter *LT5001* as the substitute item ID and *1* as the priority.

If changing substitute information, enter the current values.

New Values

New Substitute Item

Enter the value for the new substitute component.

If you're adding a new substitute, you must specify all of the required new values.

New Priority, New From Date, New To Date, and New (conversion) Rate

If you want to change the parameters of the new substitute item, enter values where applicable. Otherwise, any values that you don't specify here for the new substitute item priority, effective dates, and conversion rate remain unchanged on the BOM.

You can also change the parameters for the original item here. Enter only the fields that you want to change.

Adding Components

Access the Add page.

The screenshot displays the 'Add' page for BOM Mass Maintenance Code. At the top, there are three tabs: 'Search', 'Change', and 'Add'. Below the tabs, the 'Unit' is set to 'US008' and 'Auto Revision' is checked. The 'Mass Maint Code' is 'MMC0000003' and the 'Description' is 'Change Component'. A section titled 'Mass Maintenance Sequence' shows 'Mass Maint Seq' as '10', 'Descr' as 'Change Component', and 'Sequence Type' as 'Component'. Below this, the 'New Values' section contains several input fields: '*Component ID' is 'LT5000' with a search icon and 'Standard Wheel Subassembly' as a suggestion; 'Op Seq' is '0'; 'Pos' is an empty field; 'Eff Date' is '01/01/1900' with a calendar icon; 'Obs Date' is '12/31/2099' with a calendar icon; 'Quantity' is '1.0000'; '*Per' is 'Asy'; '*Yield' is '100.000'; '*Sub Supply' is 'N'; '*Non-Owned' is 'N'; and 'Teardown' is 'Y'. At the bottom of the 'New Values' section, there are links for 'Dimensions', 'Ref Desigs', and 'Substitutes'.

BOM Mass Maintenance Code - Add page

Note. Automatic revision operates only for those items that are defined as using automatic revisions with the Define Business Unit Item - Manufacturing: General page.

Component ID

Enter a component if you selected *Component* as the sequence type on the BOM Mass Maintenance Code - Search page.

Enter associated values that you want to add to the selected BOMs that meet the search criteria specified with the Component Search page.

You can add multiple components per Mass Maint Seq (mass maintenance sequence) code.

You can also add a placeholder item as a component. If the MMC is later applied to manufacturing BOMs that don't allow placeholders, the process indicates that BOM change as an exception, and the BOM won't be changed.

Output Item and Output Type If you selected a *Output* as the sequence type on the BOM Mass Maintenance - Search page, you must enter values and any additional required output data.

Note. The values that you select on these pages are subject to the same validation checks that apply to any MBOM component or output value. Some of these checks occur when you create the mass maintenance code, and the remaining validation checks occur when the MMC is applied.

See Also

Chapter 9, “Making Mass BOM Changes,” Changing Components, page 198

Entering Component Substitute Add Criteria

Access the Component Substitutes - Add page.

Component Substitutes - Add

New Component Substitutes

Unit: US008

Mass Maint Code: MMC0000003

Mass Maint Seq: 10

Component ID: LT5000

Standard Wheel Subassembly

Op Seq: 0

Eff Date: 01/01/1900

Obs Date: 12/31/2099

Customize | Find | View All |

First 1 of 1 Last

*Priority	*Sub Item	Description	*From Date	*To Date	Rate		
	GR8202	Dust Cover	01/01/1900	12/31/2099	1.00000000	+	-

OK

Cancel

Component Substitutes - Add page



Click the Copy Substitute button to display all valid substitute items for the business unit.

To add all valid substitute items for the business unit, click OK.

If you don't want to add all valid substitute items for the business unit, enter each individual substitute item that you want to add. In addition, enter the priority, from date, to date, and conversion rate for each substitute.

Note. Substitute items must be unique for the item. You can't enter the same item twice as a substitute with different dates. For example, substitute A with effective dates from 01/01/99 to 02/01/99 and substitute A with effective dates from 02/01/00 to 08/30/00 couldn't be substitutes for the same item. In this case, define a different substitute for the second set of effective dates.

Example: Mass BOM Changes

To better understand how you can use these three pages to effect desired mass change, let's look at an example.

To make a component obsolete on several BOMs and introduce another component in its place:

1. Create an MMC code by entering the search criteria (with the Search page) that identifies the component you want to make obsolete.

Then, on the Change page, specify the date that the component is to become obsolete (or select an effective date or obsolete date value).

2. Add the new component information on the Add page.

This includes required information such as the operation sequence and effective date for the new component.

3. If the new component requires dimension/reference designator/substitute information, add the information (with the reference designator/reference designator/substitute button), as required.
4. Run the Process BOM Mass Maint by MMC page.

Making BOM Mass Changes and Creating Automatic Revisions

You can make BOM mass changes and create automatic revisions using MMCs.

To create automatic revisions using the mass maintenance by the Mass Maintenance Codes process:

1. Define the MMC using the BOM Mass Maintenance component.
2. Run the Mass Maintenance by MMC process.

The system creates a new revision effective on the Mass Maintenance by MMC process run date.

Pages Used to Make Mass Changes Using Mass Maintenance Codes

Page Name	Object Name	Navigation	Usage
Mass Maint Code Options	EN_MASSMNT_REQ2	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Apply BOM Mass Changes by MMC, Mass Maint Code Options	Define the MMC options for the BOM Mass Maintenance COBOL SQL process (ENPMMAIN).
Assembly Item Options	EN_MASSMNT_REQ3	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Apply BOM Mass Changes by MMC, Assembly Item Options	Select the items to which the BOM Mass Maintenance process will be applied.
Select Assemblies by Items Where Used	EG_BOM_WHEREUSE_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Apply BOM Mass Changes by MMC, Assembly Item Options Click the Where Used link.	Quickly populate affected assemblies into the primary page.
Select Assemblies by Items Where Used: Enter Dimensions	EN_BOM_DIM_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Apply BOM Mass Changes by MMC, Assembly Item Options Click the Where Used link. Click the Dimensions link on the Select Assemblies by Items Where Used page.	Specify the dimensions of the component.
Select Assemblies by Items Where Used - Reference Designators	EG_BOM_WU_REF_SP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Apply BOM Mass Changes by MMC, Assembly Item Options Click the Where Used link. Click the Ref Desig (reference designator) link on the Select Assemblies by Items Where Used page.	Specify the reference designator of the component.
Mass Maint Except	EN_MMC_TRN_STAT	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Mass Maintenance Exceptions, Mass Maint Except	View the reasons that BOMs weren't changed by the BOM Mass Maintenance process.

Making Mass Changes by MMC

Access the Mass Maint Code Options page.

Unit and Mass Maintenance Code

Enter values to apply to a range or list of assemblies.

If the MMC has been set to include automatic revisions, then the system automatically creates revisions. Revisions are effective as of the run date of this process.

Note. Only items that have been defined as revision-controlled with automatic revisions and also set up to use auto revisions (with the BOM Mass Maintenance - Search page) will be auto-revision incremented.

Update Options

Select an update option. Values are:

- *Validate and Update:* Validates and updates the BOMs, depending on the update option based on:
- *Only if all BOMs are valid*
- *Any valid BOMs*
- *Validate Only:* Validates any valid BOMs.

You can select *Validate Only* on the Mass Maintenance Exceptions page to determine whether there are any validation problems with the BOMs. You can then make any necessary corrections, before you actually update the BOMs.

Note. When running Mass Maintenance by ECO to create new revisions only, you must run the process using the *Validate and Update* value to create new revision numbers.

Staged BOM Data Option

Select an option to determine what should be done with the data that was used during the Mass Maintenance process:

- *Delete Stage Results:* The system doesn't save any results of the Mass Maintenance process, and you can't use the Mass Maintenance Staged BOMs component to view the changed BOMs or correct errors.
- *Stage Results:* You can use the Mass Maintenance Staged BOMs component to see which BOMs were updated by the Mass Maintenance process, correct BOMs that returned an *error* status and resubmit the process.

Report Only Mode

Select to view the results of the Mass Maintenance process by using the Mass Maintenance Staged BOMs component.

If you don't select Report Only Mode, you can use the Mass Maintenance Staged BOMs component to view the staged BOMs, update errors and submit corrected BOMs for reprocessing.

See Also

[Chapter 9, "Making Mass BOM Changes," Changing Components, page 198](#)

Using Assembly Item Options

Access the Assembly Item Options process page.

Item Options

Select an item option. Values are:

- Range
Also select the BOM type and BOM code.
- List of Assembly Items



Click the Search button to populate the List of Assembly Items field.

Run

Click to run this request. PeopleSoft Process Scheduler runs the BOM Mass Maintenance COBOL SQL process at user-defined intervals.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

Selecting Assemblies by Items Where Used

Access the Select Assemblies by Items Where Used page.

Select Assemblies by Items Where Used

*Search: Components Only

Unit: US008

Search

BOM State: Manufacturing

*BOM Type: Production

BOM Code:

Item ID: BR4402

Std UOM: EA

Source Cdt: Buy

Brake Cable

Op Seq:

Eff Date: 01/01/1900

☒ All Dates/Revs

Obs Date:

Quantity:

Per:

Pos:

Yield:

Dimensions

Non-Owned:

Sub Supply:

Ref Desig

Levels Up: 1

☐ Top Levels only

Default ECO Values

*View: No Indent

Type: Imp

☐ BOM

☐ Rtg

Assemblies										
Item Details	Sel	Level	Item ID	Description	Comp Rev	BOM Code	Op Seq	Quantity	Eff Date	Obs Date
	☐	1	SR2100 <-	Brake Subassembly		1	10	1.0000	01/01/1985	12/31/2099
	☐	1	SR2300 <-	Brake Subassembly		1	10	1.0000	01/01/1985	12/31/2099

OK

Cancel

Select Assemblies by Items Where Used page

This page enables you to quickly populate affected assemblies into the primary page.

Search

Values are:

- *Components Only*: System displays basic component information and all higher-level subassemblies or assemblies that contain the selected item.

- *Components and Substitutes*: System displays all higher-level subassemblies or assemblies that contain the selected item, including substitutes.
- *Outputs Only*: System displays basic output information, including output type, BOM Code, output quantity, and effectivity dates.
- *Substitutes Only*: System displays substitutes for the selected item.

Sel (select)

Select the check box for all the outputs that you would like to transfer to the main page.

Item ID, Op Seq (operation sequence), and **BOM Code**

Enter values for these fields.

Search

Click this button to populate the page.

View

Select either *Indented* or *No-Indent*.

Sel (select)

Select this check box for all the components that you would like to transfer to the main page.

Comp Rev (component revision)

This field appears if the component is revision controlled. If you enter a component revision, the Select Assemblies by Items Where Used page returns all assemblies where that component is an exact match or where the current revision is used.

If you leave the field blank, the system returns assemblies that use any revision of the component.

Validation Checks

All requested changes made with the Process BOM Mass Maintenance by MMC page are validated before any MBOM changes are made. The system checks the interaction of all components and outputs on the product structure: these same checks are made within the BOM maintenance pages.

Viewing Mass Maintenance Exceptions

Access the Mass Maintenance Exceptions - Mass Maint Except page.

Mass Maint Except

Run Control ID:

Process Instance:

Unit:

Item ID:

Mass Maint Code:

Number of Exceptions
 11

Exceptions

Customize | Find |

First 1-11 of 11 Last

BOMs

Details

Item ID	BOM Type	BOM Code	Message Text	Status
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W

Mass Maintenance Exceptions - Mass Maintenance Except page

Use this page to review the mass maintenance exceptions.

Click the Count button to view the number of exceptions.

After you've reviewed the exceptions and made any needed changes to the BOMs or mass maintenance data, you can then re-run the Mass Maintenance process.

Viewing and Correcting Mass Maintenance Staged BOMs

As part of the Mass Maintenance process, you can correct BOM messages with data errors using the Staged BOMs pages. You can view each BOM message and correct the errors using these pages. You can then change the status to *reprocess* and submit the BOM for reprocessing immediately or use the MMC Staged BOM process to reprocess a range of BOMs.

This section discusses how to:

- View the staged BOM status.
- Correct staged BOM summary errors.
- Correct staged BOM multiple output summary errors.

Pages Used to View and Correct Mass Maintenance Staged BOMs

Page Name	Object Name	Navigation	Usage
Update Staged BOM Details - BOM Status	EN_TRN_BOM_STAT	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, BOM Status	View, and possibly update, the results from a BOM Mass Maintenance process. Note. You must have run BOM Mass Maintenance with <i>Stage Result</i> as the value of the Staged BOM Data Options field.
Update Staged BOM Details - Summary	EN_TRN_BOM_HDR	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, Summary	View and update the results from a BOM Mass Maintenance process.
Update Staged BOM Details - Header: Assembly Text	EN_TRN_BOM_TEXT	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, Header, Assembly Text	View and update the results from a BOM Mass Maintenance process.
Update Staged BOM Details - Header: Outputs	EN_TRN_BOM_OUT	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, Header, Outputs	View and update the results from a BOM Mass Maintenance process.
Update Staged BOM Details - Components: Component Details	EN_TRN_BOM_CMP	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, Components, Component Details	View and update the results from a BOM Mass Maintenance process.
Update Staged BOM Details - Components: Reference Designators	EN_TRN_BOM_CMPDESG	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, Components, Reference Designators	View and update the results from a BOM Mass Maintenance process.
Update Staged BOM Details - Components: Dimensions	EN_TRN_BOM_CMPDIM	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, Components, Dimensions	View and update the results from a BOM Mass Maintenance process.
Update Staged BOM Details - Components: Substitutes	EN_TRN_BOM_SUB	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Update Staged BOM Details, Components, Substitutes	View and update the results from a BOM Mass Maintenance process.

Viewing the Staged BOM Status

Access the Update Staged BOM Details - BOM Status page.

BOM Status				Summary	Header	Components
Unit:	US008	Process Instance:	3356	Source Cdt:	Make	
Item ID:	SR1002	Carrera 6000 Hi Performance Road Bike			BOM Result:	No Errors
BOM State:	Manufacturing	BOM Code:	1	Serial Control:	Y	Status: New
BOM Type:	Production	BOM Qty:	1	Std UOM:	EA	Reprocess ☐

Messages			
Customize Find View All First 1-7 of 11 Last			
BOMs Details			
Message	Result	Component ID/ Output Item ID	Op Seq
Operation Sequence does not exist on Primary Item Routing	W	FR7003	10
Operation Sequence does not exist on Primary Item Routing	W	FR7005	10
Operation Sequence does not exist on Primary Item Routing	W	FR7012	20
Operation Sequence does not exist on Primary Item Routing	W	HB9002	30
Operation Sequence does not exist on Primary Item Routing	W	LT3008	20
Operation Sequence does not exist on Primary Item Routing	W	LT5000	30
Operation Sequence does not exist on Primary Item Routing	W	PS1002	30

Update Staged BOM Details - BOM Status page

BOM State

The value that appears is *Manufacturing*. The BOM state must be valid or the system considers the message an error.

BOM Code

Enables you to assign a primary and up to 98 alternate BOMs. There must be a BOM code or the system considers the message an error.

Status

Indicates the eligibility of this BOM for further processing. You can receive BOM error messages with any of these statuses:

- *Complete*: You can't update the staged results for this BOM in Data Definition Maintenance, because the BOM has already been updated in the system. You can only view the BOM when it's in this status. You can't modify it.
- *Error*: There is at least one data validation error in the staged results for this BOM.
You can change to *Cancelled* or *Reprocess*.
- *In Process*: When processing of a transaction is initiated, the status of the transaction record is set to *In Process*.
- *Incomplete*: An Incomplete transaction is a transaction that's still being created by the transaction pages. The status changes to new when the transaction is ready to be processed by the background processes. The system won't process an incomplete transaction.
- *New*: The staged results are valid, but the original BOM hasn't been updated yet. The BOM is eligible for update and reprocessing.

You can change it to *Cancelled* or *Reprocess*.

- *Reprocess*: When you correct errors using the Transaction Maintenance Detail pages, you can change the BOM status to *Reprocess*.

BOM Type

Displays the BOM type. Values are *Production* or *Rework*. Production BOMs are used as the basis for manufacturing assemblies. Use rework BOMs when you have a standard rework process where you include additional components to repair BOMs. The BOM type must be valid or the system considers the message an error.

If you are correcting multiple messages, you can manually change the error status of each message to *Reprocess* after you've corrected the data. Then run the BOM Loader process to reprocess the data for multiple messages. The system changes reprocess and new messages to the *complete* status after confirming that there are no errors in the message.

To correct a single message, select the Reprocess check box, to set the message status to *Reprocess*, and click OK or Apply to initiate the validation background process.

Messages

In the Messages group box, the system displays the error message and the result of the message.

This page lists all of the errors and warnings for the BOM, whether it's for the overall BOM, for a specific component, or for output. The Result column indicates the severity of the message: *W* indicates a warning and doesn't stop the BOM from being valid, and *E* indicates an error and must be fixed for the BOM to be valid.

See Also

[Chapter 9, "Making Mass BOM Changes," Processing Staged BOMs, page 214](#)

Correcting Staged BOM Summary Errors

Access the Update Staged BOM Details - Summary page.

Component ID, **Comp Rev** (component revision), **Op Seq** (operation sequence), **Eff Date** (effective date), **Obs Date** (obsolete date), **Quantity**, and **Per**

See Also

[Chapter 8, "Maintaining Bills of Material," Maintaining BOM Summaries, page 163](#)

Correcting Staged BOM Multiple Output Summary Errors

Access the Update Staged BOM Details - Header: Outputs page.

Output Summary Tab

Select the Output Summary tab.

For each output, you can change the output type, output item, operation sequence, effective dates, and output quantity.

Attributes Tab

Select the Attributes tab.

You can change the resource allocation percentage and cost allocation percentage.

See Also

[Chapter 8, “Maintaining Bills of Material,” Defining BOM Outputs, page 168](#)

Processing Staged BOMs

After you’ve viewed and corrected your staged BOMs, run the MMC Stage Application Engine process (EN_BOM_MSG) to reprocess the BOMs.

Page Used to Process Staged BOMs

Page Name	Object Name	Navigation	Usage
MMC Stage	EN_RUN_BOMSTAGE	Manufacturing Definitions, BOMs and Revisions, BOM Mass Changes, Process Staged BOMs, MMC Stage	Reprocess corrected staged BOMs using the MMC Stage process.

Running the MMC Stage Application Engine Process (EN_BOM_MSG)

Access the MMC Stage page.

Update Options

Select an update option. Values are:

- *Validate Only*: Validates the data but doesn’t load or change BOM tables.
- *Validate and Transfer*: Validates the data and loads and changes BOM tables.

Re-process any Errors

If you are processing a large number of BOMs, you can correct the errors in the BOM pages but leave the status as *Error*. You then select this check box while running the BOM Loader process, and the system reprocesses transactions with the statuses of *New*, *Reprocess*, and *Error*. If this check box is cleared, only transactions with statuses of *New* and *Reprocess* are processed. This option is only applicable when you select *Validate Only* or *Validate and Transfer*.

Purge Stage and Error Records

Select this check box to delete the error transactions from the staging table once you have run this process.

- If you select *Validate and Transfer* and Purge Stage and Error Records, the BOMs will first be validated and then transferred to the BOM tables.

If any of the BOMs were invalid, the BOM tables won't be updated, but they will be deleted from the stage and error records.

- If you select *None* and Purge Stage and Error Records, the BOMs won't be validated or changed.

The stage and error records will be purged. This combination can be used to clean up after you have completed processing BOMs.

Run

Click to run this request. PeopleSoft Process Scheduler runs the Staged BOMs process at user-defined intervals.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

CHAPTER 10

Displaying Bills of Material

This chapter provides an overview of displaying bills of material (BOMs) and discusses how to:

- Display BOM structures.
- Display summarized BOMs.
- Display BOM costs.
- Compare manufacturing BOMs.
- Check the BOM verification status.
- View item where-used information.

Understanding Display of BOMs

PeopleSoft Manufacturing provides several inquiries for BOMs.

Common Elements Used in This Chapter

BOM State	Appears by default as <i>Manufacturing</i> and is display-only.
BOM Type	Select a BOM type. Values are: • <i>Production</i>: This is the default BOM type. Manufacturing BOMs can be used for standard manufacturing processes. • <i>Rework</i>: Create rework BOMs when you have a standard kit of components used in rework or repair.
View	You can view summary data with these options: • Indented with Dates • Indented with Revs (indented with revisions) • Non-Indented with Dates • Non-Indented with Revs The indented options provide an indented (tree) BOM structure for the selected depth.

All Dates/Revs

Select this check box to search all effective dates and revisions for the item's BOM.

Eff Date (effective date) and
Obs Date (obsolete date)

The beginning and ending dates for the BOM. When entering selection criteria for BOMs, use the Eff Date field for items without revisions or to further specify the effective date for a BOM for a specified revision.

Displaying BOM Structures

This section discusses how to:

- Display BOM structures.
- Display BOM substitutes.
- Display BOM outputs.
- Display BOM component details.

Pages Used to Display BOM Structures

Page Name	Object Name	Navigation	Usage
Manufacturing BOMs - Summary	EN_BOM_INQUIRY	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Summary	View BOM component structure at a summary or general level, including the indented BOM structure.
Output List	EN_BOM_LIST_OUT_SP	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Summary Click the Outputs link on the Attributes tab.	View primary, co-products, and by-products produced from this BOM.
Component Substitutes	EN_BOM_INQ_SUB	• Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Summary • Manufacturing Definitions, BOMs and Revisions, Review BOM Information, BOM Summarized Click the Substitutes link.	View BOM component substitute items.

Page Name	Object Name	Navigation	Usage
Assembly Text	EN_BOM_INQ_HEADER	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Header, Assembly Text	View BOM assembly text.
Assembly Attachments	EN_BOM_INQ_ATT	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Header, Assembly Attachments	View BOM assembly attachments.
Assembly Documents	EN_BOM_INQ_DC	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Header, Assembly Documents	Display BOM assembly documents. Note. You must have PeopleSoft Engineering installed to access this page.
Header - Outputs	EN_BOM_INQ_OUTS	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Header, Outputs	Display BOM assembly outputs.
Components - Component Details	EN_BOM_INQUIRY_D	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Components, Component Details	Display BOM component detail such as effectivity dates, quantities, yield, and unit of measure (UOM).
Text	EN_BOM_INQ_D_TXT	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Components, Text	Display BOM component text.
Attachments	EN_BOM_INQ_CATT	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Components, Attachments	Display BOM component attachments.
Documents	EN_BOM_INQ_CDC	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Components, Documents	Display BOM component documents. Note. You must have PeopleSoft Engineering installed to access this page.
Reference Designators	EN_BOM_INQ_REF	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Components, Reference Designators	Display BOM component reference designators.

Page Name	Object Name	Navigation	Usage
Dimensions	EN_BOM_INQ_CDIM	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Manufacturing BOMs, Components, Dimensions	Display BOM component dimensions.
BOM Report	EN_BOM_REPORT	Manufacturing Definitions, BOMs and Revisions, Reports, Bills of Material, BOM Report	Generate manufacturing BOM reports.

See Also

Chapter 8, “Maintaining Bills of Material,” page 147

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” ENS1000 - BOM Report, page 660

Displaying BOM Structures

Access the Manufacturing BOMs - Summary page.

Summary | Header | Components

*Unit: US008

*Item ID: SR2001 Gear Subassembly

*BOM Type: Production

*BOM Code: 1

Revision: A

Source Code: Make

Eff Date: 09/29/2003

Depth: 1

BOM Qty: 1

Std UOM: EA

Find

*View: Non-Indented

Chunk Size: 100

1 to 9 of 9

Component List

Summary | Attributes | [Grid Icon]

Lvl	Component ID	Description	Op Seq	Eff Date	Obs Date	Eff Rev	Obs Rev	Quantity	Std UOM	Source Cd
1	GR8000	Gear, Sugishita	50	01/01/1985	12/31/2099	A	----	1.0000	EA	Buy
1	GR8002	Chain, Sugishita	50	01/01/1985	12/31/2099	A	----	1.0000	EA	Buy
1	GR8007	Derailleurs, Sugishita	40	01/01/1985	12/31/2099	A	----	1.0000	EA	Buy
1	GR8012	Cassette LX145 8 Speed	30	01/01/1985	12/31/2099	A	----	1.0000	EA	Buy
1	GR8200	Axle Carrier	10	01/01/1985	12/31/2099	A	----	1.0000	EA	Buy
1	GR8201	Cable Housing	10	01/01/1985	12/31/2099	A	----	1.0000	EA	Buy
1	GR8202	Dust Cover	20	01/01/1985	12/31/2099	A	----	1.0000	EA	Buy
1	GR8300	Crank Set Subassembly	50	01/01/1985	12/31/2099	A	----	1.0000	EA	Make
1	HB7100	Hub Subassembly	20	01/01/1985	12/31/2099	A	----	1.0000	EA	Make

Manufacturing BOMs inquiry - Summary page

Unit, Item ID, BOM Type, Enter the basic information about the BOM.
BOM Code, Eff Date
(effective date), **Revision**

Depth	Enter the number of levels that you want to view by specifying the depth. If you select a depth of <i>1</i> , this page displays only the top level of the BOM.

Note. You can select any valid BOM code. However, the system always calculates lower levels based on the primary BOM code *1*, regardless of the depth that you enter.

After you make your selections, click the Search button to view the data. The system sorts the summary in this sequence:

1. Assembly
2. Subassembly
3. Component
4. Operation sequence
5. Effective date

Note. If you specify a component revision during BOM maintenance, the component revision appears on the Summary tab. If the component is revision-controlled, but the field is left blank because this is the current revision, this inquiry displays the revision code that's current for the component, based on the top-level effective date or revision that you entered.

Click a link in the Component ID column to access component details.

Attributes Tab

Select the Attributes tab.

Outputs	Click this link to view the Outputs for lower-level items (if it is a multiple output BOM).

Substitutes	Click this link to view substitute data.

Displaying BOM Substitutes

Access the Component Substitutes page.

Component Substitutes

Item: SR2001 Gear Subassembly **Std UOM:** EA

Component ID: GR8000 Gear, Sugishita **Std UOM:** EA **Pos Nbr:** 0

Op Seq: 50 **Eff Date:** 01/01/1985 **Obs Date:** 12/31/2099 **Eff Rev:** A **Obs Rev:** ----

Substitute Items						
Priority	Substitute Item ID	Description	From Date	To Date	Conversion Rate	Std UOM
1	GR8001	Gear, Campani	01/01/2000	12/31/2099	1.00000000	EA

Return

Component Substitutes page

Substitutes and related data such as Conversion Rate and effectivity dates appear in order of priority.

Displaying BOM Outputs

Access the Header - Outputs page.

The values in the header data (for the Unit, Item ID, BOM Type, BOM Code and Eff Date or Revision, Depth fields) are defaults values from the Summary page.

Note. Regardless of the depth that you entered, only outputs for the top-level item appear on this page. You can, however, use the Manufacturing BOMs inquiry - Summary: Summary: Attributes page to view lower level outputs. You do this by clicking the Outputs link. This link appears only if the component has multiple outputs on its BOM.

The system only explodes primary co-products for the BOM code that you specified. You cannot enter a co-product and see it exploded downward. Rather, you must enter the primary to which that co-product is associated to view the co-product details.

See Also

[Chapter 8, “Maintaining Bills of Material,” Defining BOM Outputs, page 168](#)

Displaying BOM Component Details

Access the Components - Component Details page.

The values in the header data, for the item, BOM type, BOM code, revision, and effective date are default values from the Summary page.

Standard component data for the component revision, operation sequence, yield, subcontracted supply, teardown, and effectivity dates also appear.

Displaying Summarized BOMs

This section discusses how to:

- Display summarized BOMs.
- Display summarized outputs.

Pages Used to Display Summarized BOMs

Page Name	Object Name	Navigation	Usage
BOM Summarized	EN_BOM_SUMMARY	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, BOM Summarized	View, at all levels, all components that comprise an assembly's product or rework structure. This page enables you to view the quantity of components for an assembly regardless of level. Use it to determine component requirements, at all levels, based on a specific assembly demand quantity.
Component Substitutes	EN_BOM_INQ_SUB	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, BOM Summarized	View BOM component substitute items.
BOM Summarized Outputs	EN_BOM_SUMM_OUTS	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, BOM Summarized, BOM Summarized Outputs	Display BOM summarized outputs.

Displaying Summarized BOMs

Access the BOM Summarized page.

BOM Summarized

BOM Summarized Outputs

*Unit:

US008

Search

*Item ID:

MT2000

Professional Road Bike, Womans

*BOM Type:

Production

*BOM Code:

1

Source Code:

Make

Revision:

A

Std UOM:

EA

BOM Qty:

1

Eff Date:

09/29/2003

Required Qty:

1.0000

Depth:

1

Routing Code:

1

Assembly Starts Qty:

1.0000

Find

Summary

Detail

View:

Indented

Chunk Size:

100

1 to 13 of 13

Lvl	Component ID	Description	Op Seq	Quantity	Std UOM	Per	Qty Required	Qty Available
1	FR7002	Bike Frame, Aluminium	10	1.0000	EA	Asy	1.0000	10.0000
1	FR7005	Front Fork	10	1.0000	EA	Asy	1.0000	675.0000
1	FR7012	Primer Paint	40	0.5000	GAL	Asy	1.0000	0.0000
1	FS3000	Bolt	10	10.0000	EA	Asy	10.0000	2197.0000
1	FS3001	Washer	10	10.0000	EA	Asy	10.0000	3013.0000
1	FS3002	Nut	10	10.0000	EA	Asy	10.0000	57744.0000
1	HB9000	Handlebar, Pro Road Racing	40	1.0000	EA	Asy	1.0000	136.0000
1	LT3009	Blue Paint	40	1.0000	GAL	Asy	1.0000	472.0000
1	LT5000	Standard Wheel Subassembly	30	1.0000	EA	Asy	1.0000	0.0000
1	PS1004	Pedal, Deluxe	50	2.0000	EA	Asy	2.0000	350.0000
1	SR2001	Gear Subassembly	30	1.0000	EA	Asy	1.0000	119.0000
1	SR2100	Brake Subassembly	50	1.0000	EA	Asy	1.0000	0.0000
1	ST8003	Dual Pad Seat, Womans	50	1.0000	EA	Asy	1.0000	1177.0000

BOM Summarized page

Unit, Item ID, BOM Type, BOM Code, Eff Date
(effective date), **Revision**

Select information to specify the BOM.

Search

Click to display the summarized BOM.

Required Qty (required quantity)

Enter this value for the assembly item to determine the total number of each component required, at all levels, to produce a specific quantity of the assembly item. The system multiplies each component's quantity per assembly by this value to determine the component required quantity that appears in the lower portion of the page.

Click the Search button again to display the calculated required quantities.

Note. To view a summarized BOM, enter a Required Qty of 1.

Depth

If you select a depth of 1, this page displays only the top level of the BOM.

If you select the *Rework* as the BOM type and *1*, as the depth, the system displays only rework BOMs. If you select a depth greater than *1*, the system displays rework BOMs for the first level and manufacturing BOMs for all lower levels.

Note. You can select any valid BOM code, but regardless of the depth that you enter, the system calculates all lower levels based on the primary BOM code (1).

Routing Code	Select the appropriate routing for the item.
Assembly Starts Qty	Displays the beginning quantity required based on the required quantity. This amount accounts for any operation yield loss during the production process.
Summary	Lists only the Component ID, Description, and Qty Required fields and summarizes the total required quantity for the component across all levels. The quantity required includes the amount needed to offset both component yield and operation yield losses. The current quantity available from business items attributes also appears.
Detail	Click to display data for all fields and to use the indented View field.

The system sorts the summary alphanumerically by component ID for level 1 items and summarizes the displayed data by quantity, regardless of where the component occurs in the product structure.

Note. If substitute items or multiple outputs exist for a component, those links appear following the Qty Available field.

If there are outputs associated with any of the components, an Outputs link appears. Click an Output link to access the Output Item Details page.

Displaying Summarized Outputs

Access the BOM Summarized Outputs inquiry page.

Note. The system only explodes primary co-products for the BOM Code specified. Only outputs at the top level are displayed, regardless of the Depth entered.

Expected Output Qty	Represents the anticipated output of each primary, co-product, recycle and waste product, based on the required quantity you enter. This is calculated as follows: $((\text{Required Qty} / \text{BOM Qty}) \times \text{Output Quantity})$.

Displaying BOM Costs

This section provides an overview of how costs are determined for a BOM and discusses how to:

- Display BOM summary costs.
- Display BOM output costs.

- Display BOM component detail costs

Understanding BOM Costs

To determine the costing impact of BOM changes to an assembly, you can display the costs of an assembly, its components, and outputs by cost type and cost version. This is useful for determining the costing impact of manufacturing BOM changes on an assembly.

The Costed BOM page performs a mini cost roll-up on the assembly that you enter. It calculates the assembly's cost (including all outputs) by summarizing the cost of the components and outputs based on the BOM in effect on the date specified or for the revision specified. Routing costs are not recalculated.

Here is how the system performs the cost roll-up:

- It looks at the components and outputs in effect for the selected BOM code, based on the as of date, and it uses BOM code 1 for all lower levels.
- It includes the routing cost by using the existing This Level labor, machine, subcontracting, and overhead costs for the cost type and cost version based on the cost roll-up performed.
- It uses the existing This Level labor, machine, subcontracting, and overhead costs for the cost type and cost version.

The system uses a BOM code of 1 and a routing code of 1 by default, but you can override the BOM and routing codes. The roll-up uses the item's material costs for the cost type and version selected. Costs for each of the assembly item's components must exist for the cost type and cost version selected to calculate the costs correctly. Floor stock items are not included in the cost roll-up.

Note. Expensed and planning items are not included in the cost roll-up. No costs are required for expensed or planning items, because no quantity on hand is maintained in PeopleSoft Inventory.

You maintain cost types and versions within PeopleSoft Cost Management. Cost types enable you to perform costing simulations and what-if analyses and to calculate new standard costs prior to updating your production costs. Cost versions are iterations of a particular cost calculation for a cost type. You can have multiple versions of costs for each cost type. Cost roll-ups for production items are calculated by cost type and cost version. You cannot display costed BOM information for rework BOMs.

Once you've performed the BOM cost roll-up using the selected cost type, cost version, BOM code, and routing code, you can use the inquiry to determine how the item's cost might be impacted by subsequent changes to the BOM.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, "Defining the Cost Foundation for Makeable Items"

Pages Used to Display BOM Costs

Page Name	Object Name	Navigation	Usage
Costed BOM	EN_BOM_INQ_COSTED	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Costed BOM	Display costed summary manufacturing BOM data. You cannot view configured item costs using this page.
Output Costs	EN_BOMCOST_OUT_SP	Click the Output Costs link on the Costed BOM page.	Display, by output type, all lower-level costing details for each co-product based on the costing percentage split.
Detailed Item Costs	EN_ITEMCOST_OUT_SP	Click the Output Costs link on the Costed BOM page, then click an Output Item.	Display This Level Cost and Lower Level Costs by cost element for the selected item ID and output type.
Component Detail Costs	EN_ITEMCOST_SP	Click a Component ID on the Costed BOM page.	Display the manufacturing BOM component details. You can display the Extended This Level Cost and Extended Lower Level Costs, by cost element, for the selected component item, cost type, and cost version.
BOM Costed Report	EN_BOM_COST_REPORT	Manufacturing Definitions, BOMs and Revisions, Reports, BOM Costed, BOM Costed Report	Generate a hard-copy report that details associated manufacturing BOM costs.

See Also

[Appendix B, “PeopleSoft Manufacturing Report Descriptions,” ENS1010 - BOM Cost Report, page 666](#)

Displaying BOM Summary Costs

Access the Costed BOM inquiry page.

Costed BOM

*Unit: US012

*Item ID: 000000000000020036

*Cost Type: CUR Current

*BOM Code: 1

Eff Date: 09/29/2003

View: Non-Indented

Search

Creamy Tomato Sauce Bottled, 28 oz.

*Cost Version: REV2 New Proposed Std Cost

Routing Code: 1

BOM Qty: 375 CS

Depth: 1

Cost as Batch ☒

Output Costs

Components							Customize Find	First 1-5 of 5 Last
Lvl	Type	Component ID	Description	Cost Req. Qty	Std UOM	Per	Extended Cost	
1	Component	000000000000020013	Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream	1000.0000000	GAL	Order	777.8000	
1	Component	000000000000020025	Bottle, 28 oz.	4500.0000000	EA	Order	179.1000	
1	Component	000000000000020028	Screwtop	4500.0000000	EA	Order	2.2500	
1	Component	000000000000020029	Label - 28oz Creamy Tomato	4500.0000000	EA	Order	11.7000	
1	Component	000000000000020030	Packing Box	375.0000000	EA	Order	7.0875	
Total Cost:							1072.6625	

Costed BOM inquiry page

Unit, Item ID, Cost Type, Cost Version, BOM Code, and Routing Code

Select the appropriate information for the BOM.

Note. The cost version that you select must be valid for the cost type that you selected. In addition, to correctly calculate total cost, costs for each of the assembly item's purchased components must exist for the cost type and cost version that you selected. This is accomplished by rolling up the cost type and cost version within PeopleSoft Cost Management.

You can select any valid BOM code, but regardless of the depth that you enter, the system calculates all lower levels based on the primary BOM code. As long as the BOM exists, you can enter a BOM code other than the one used for the latest cost type version where a roll-up was performed. In this case, the Output Costs page does not display any cost version cost details, because they do not exist (no roll-up was performed). In addition, if you enter a BOM code that does not exist for a cost version, the routing code is cleared and no This Level Costs are included in the calculations. The routing code must also be valid for the cost version, because it is used to calculate the This Level Costs for the inquiry.

Note. When the Routing Code prompt table does not display any routing codes or displays a routing code of 0, and a routing exists, either no routing exists for the assembly or no This Level Costs were generated for the BOM being costed.



Click the Item Search button to access the Item Search Criteria page and select a different item.

Eff Date (effective date) and Revision	Enter this information for the BOM that you want to view.
Cost as Batch	If the item is a single output item with a BOM quantity greater than 1, you can access this check box. Clear the check box to cost the item in terms of the production of 1 unit of the end-item or select the check box to roll up all component costs and This Level Costs, based on the BOM quantity. If the item entered is a multiple output item, this check box is selected and is display only. In this case, the results rendered by the inquiry represent the total cost of the batch, and the required quantities and extended cost calculated are for the entire batch (based on the BOM quantity), as opposed to one unit of the batch.
Depth	Enter the number of levels for which you want to display BOM component-costed information.
	Note. Select the maximum depth for revision-controlled BOMs.
Required Qty (required quantity)	Represents the required quantity (for each component) to build the item ID specified. This quantity depends on the Cost as Batch setting. If Cost as Batch is selected, it is the required quantity to build the batch. If it's not selected, then it's the required quantity to build one of the items. This field factors in assembly BOM quantity, component quantity per assembly or order, component yield, and operation yield. Even though they will have only a purchased cost associated with them, by-products also appear. If the by-product is a <i>recycle</i> by-product, then the cost is negative; if it's a <i>waste</i> by-product, then the cost is positive. If the item does not have a purchase cost, the cost is 0.
Extended Cost	Displays the component's cost for the cost type and version specified, multiplied by the required standard quantity UOM.

Cost Calculation for a Revision-Controlled BOM

There are times when the same revision-controlled BOM may reflect different costs:

- If you enter a depth of *less than* the maximum number of levels for the costed BOM, the lower-level costs that appear reflect those costs generated by the original cost roll-up for this cost version and date.
- If you enter the *maximum depth* for the costed BOM, the lower-level costs that appear reflect the most current BOM and routing, and not the cost version that you entered on the Costed BOM page.

In addition, if changes occur to the BOM and routing after the cost roll-up, the cost of the BOM where you entered a depth of less than the maximum may reflect different costs from the cost from the maximum depth BOM. Both of these costed BOMs are considered correct, depending on the depth that you enter.

This diagram illustrates the cost calculation for a revision-controlled BOM:

Cost Calculation - Revision Controlled Bill of Material

Cost TypeStd
Cost Version2003
Item IDA

Cost Roll-up Date03/01/03

Cost of A
20.00Material
5.00This Level Labor
25.00Lower Level Labor

A

20.00Material
5.00This Level Labor
25.00Lower Level Labor

B

5.00Matl

C

15.00Material
5.00This Level Labor
20.00Lower Level Labor

D

5.00Matl

E

10.00Material
20.00This Level Labor

F

5.00Matl

G

5.00Matl
01/01-03/31

H

6.00Matl
04/01-12/31

A

21.00Material
5.00This Level Labor
25.00Lower Level Labor

B

5.00Matl

C

16.00Material
5.00This Level Labor
25.00Lower Level Labor

D

5.00Matl

E

11.00Material
20.00This Level Labor

F

5.00Matl

G

5.00Matl
01/01-03/31

H

6.00Matl
04/01-12/31

If you request to view the BOM Costed Inquiry page as of:

04/01/03

Item A and Depth = 1

The Total Cost for Item A = 20.00Material
5.00This Level Labor
25.00Lower Level Labor

Item A's cost is still reflecting Item G's cost in subassembly E

04/01/03

Item A and Depth = 5

The Total Cost for Item A = 21.00Material
5.00This Level Labor
25.00Lower Level Labor

Item A's cost is now reflecting Item H's cost instead of Item G's cost in subassembly E

Cost Calculation Example

The system derives the cost of the assembly from the component’s This Level (top level) and Lower Level Costs for the cost type, cost version, BOM and routing codes that you selected. It calculates costs for all assemblies and subassemblies that fall within the depth that you entered. If the BOM code is not 1, then the outputs on the Output Costs page reflect the outputs of this BOM code, and the components listed for level 1 are based on that BOM code. Lower levels always use BOM code 1. The routing code that you entered is used solely to determine the This Level Costs included in the calculation total costs.

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Note. If the component appears as a subassembly, only This Level Costs appear on this page for the subassembly. Lower Level Costs for the subassembly appear on this page within the child components that appear for the subassembly.

Total cost is the sum of all the extended costs of all components on a BOM for a given effectivity date or revision, plus any This Level Costs for the item. The system computes the costs for each component and then totals for the assembly item.

By-products also appear on this page because their costs are incorporated into the assembly cost in the same manner as components. If the by-product is a *recycle* by-product, the cost impact is negative and is subtracted from the total cost. If it is a *waste* by-product, the cost is positive and is added to the total cost unless the item does not have a purchase cost, in which case the cost is 0.

Note. While you can run a Costed BOM inquiry for a purchased item that has a BOM, the system calculates only the material costs, based on the material costs for the components specified and the cost type and version that you select.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, “Defining the Cost Foundation for Makeable Items”

Displaying BOM Output Costs

Access the Output Costs page.

Note. Due to rounding differences, you may see a small variance (+ or – 0.0003) between the cost version and the inquiry costs in this inquiry. This occurs when the system displays the costed BOM results for an item that’s either a batch item or has batch assembly items at lower levels.

Item Cost Details Tab

Cost Version Item Cost	Displays the last stored cost.
Inquiry Item Cost	Displays the new cost of the item being queried.
Delta	Displays the difference between the Cost Version Item Cost and the Inquiry Item Cost fields.

Batch Cost Details Tab

Select the Batch Cost Details tab.

Output Costs			
Output Item Details		Item Cost Details	Batch Cost Details
Output Type	Output Items	Description	Inquiry Batch Cost
Primary	0000000000000020036	Creamy Tomato Sauce Bottled, 2	1072.6625
Cost Version Total:			2.8604
Inquiry Total:			2.8604
Total Costs Difference:			0.0000

Output Costs page: Batch Cost Details tab

Note. You can access this page only if you selected the Cost as Batch check box on the Costed BOM page.

Inquiry Batch Cost Displays the total cost from the Costed BOM page multiplied by the cost percentage of the primary product or co-product.

Details Tab

Select the Details tab.

This tab displays BOM costs broken down by output type. For example, a process has two co-products, A and B. Co-product A has a cost allocation percentage of 60, and co-product B has a cost percentage of 40. One row shows A, with 60 percent of the costs, and another row shows B, with 40 percent of the costs.

Note. The cost allocation percentages must equal 100.

See Also

[Chapter 8, “Maintaining Bills of Material,” Assigning Associated Primary BOMs, page 154](#)

[Chapter 8, “Maintaining Bills of Material,” Defining BOM Outputs, page 168](#)

Displaying BOM Component Detail Costs

Access the Component Detail Costs page.

Cost Elmnt (cost element)	Displays a category of costs that you defined, such as materials, labor, or overhead.
Calc Quantity (calculated quantity)	The system multiplies the cost by the calculated quantity to determine the extended cost.
Extended This Level Cost	Displays the item’s extended cost of putting the components together. This cost is also known as the conversion cost.
Extended Lower Level Cost	Displays the item’s extended cost of its components prior to their assembly at this level.
Total	The field on the left sums the This Level Costs for all cost elements, and the field on the right sums the Lower Level Costs for all cost elements.

Example

If A is a component on an assembly and is itself a subassembly composed of components B and C, and the cost of B is 20.00, and the cost of C is 30.00, then A's Lower Level Cost is 50.00 (not considering extended costs). If the cost of putting B and C together is 25.00, then A's This Level Cost is 25.00. For the assembly on which A is a component, the top-level assembly's Lower Level Cost is 75.00 (A's This Level Cost plus the Lower Level Cost).

Rounding

PeopleSoft Cost Management calculates the different extended costs by multiplying cost by the calculation quantity. It displays the cost results to four decimal places for viewing purposes. Calculation quantity can represent a value from four to ten decimal places. The QPA rounding setting determines the decimal range for the calculated quantity.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting the PeopleSoft Manufacturing Installation Options

Comparing Manufacturing BOMs

This section lists common elements and discusses how to:

- Display BOM comparisons.
- Display BOM component details differences.
- Compare substitute item differences.
- Compare assembly outputs differences.

Common Elements Used in This Section

Differences

Displays the differences between the two BOMs. Values include:

- *Added*: The component has been added to the Target BOM (BOM2).
- *Deleted*: The component has been deleted from the Baseline BOM (BOM1).

The system determines whether a component has been deleted, by comparing the component IDs, operation sequences, and effectivity dates.

- *Chg* (change): Indicates that the component exists on both BOMs, but there are differences in the component attributes.
- *Chg BOM1*: If you have made a component change to the baseline BOM, the components appear listed.
- *Chg BOM2*: If you have made a component change to the target BOM, the components appear listed.

Note. The system lists a change when any information other than the component, operation sequence, or effective date has changed.

Pages Used to Compare Manufacturing BOMs

Page Name	Object Name	Navigation	Usage
Compare BOMs - BOM Selections	EG_BOM_COMPARE1E	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, BOM Selections	View the comparison of two manufacturing BOMs.
Compare BOMs - Component Detail: Component Details	EG_BOM_COMPARE2	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Component Detail, Component Details	View BOM component differences.
Compare BOMs - Component Detail: Attachments	EG_BOM_COMPARE8	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Component Detail, Attachments	View differences in component attachments for two selected BOMs.
Compare BOMs - Component Detail: Documents	EG_BOM_COMPARE7	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Component Detail, Documents	View component document differences for two selected BOMs. Note. You must have PeopleSoft Engineering installed to access this page.
Compare BOMs - Component Detail: Reference Designators	EG_BOM_COMPARE9	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Component Detail, Reference Designators	View differences in reference designators for the two selected BOMs.
Compare BOMs - Component Detail: Dimensions	EG_BOM_COMPARE5	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Component Detail, Dimensions	View dimension differences in two selected BOMs.
Compare BOMs - Component Detail: Substitutes	EG_BOM_COMPARE_SUB	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Component Detail, Substitutes	View component substitute differences for two selected BOMs.
Compare BOMs - Assy Header: Differences	EG_BOM_COMPARE1D	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Assy Header, Differences	View assembly differences between the two selected BOMs.

Page Name	Object Name	Navigation	Usage
Compare BOMs - Assy Header: Attachments	EG_BOM_COMPARE1C	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Assy Header, Attachments	View differences in BOM attachments.
Compare BOMs - Assy Header: Documents	EG_BOM_COMPARE1B	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Assy Header, Documents	View differences in assembly documents for the two selected BOMs. Note. You must have PeopleSoft Engineering installed to access this page.
Compare BOMs - Assy Header: Outputs	EG_BOM_COMPARE10	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Compare BOMs, Assy Header, Outputs	View the output differences between two selected BOMs.
BOM Compare Report - BOM Compare Report	EN_BOM_COMP_REPORT	Manufacturing Definitions, BOMs and Revisions, Reports, BOM Comparison, BOM Compare Report	Define the two manufacturing BOMs that you want to compare.
BOM Compare Report - Print Options	EN_BOM_COM_REPORT2	Manufacturing Definitions, BOMs and Revisions, Reports, BOM Comparison, BOM Compare Report, Print Options	Select the details that you want to appear on the BOM Compare report.

See Also

PeopleSoft Engineering 8.8 PeopleBook, “PeopleSoft Engineering Reports,” ENS1005 - Compare BOMs Report

Displaying BOM Comparisons

Access the Compare BOMs - BOM Selections page.

BOM Selections

Unit: US012

*BOM Type: Production

Compare BOMs

Baseline BOM (BOM1)

*BOM State: Manufacturing

Item ID: 000000000000020024

*BOM Code: 1

Eff Date: 01/01/1900

All Dates/Revs

Plain Sauce Bottled, 28oz

Target BOM (BOM2)

BOM State: Manufacturing

Item ID: 000000000000020036

*BOM Code: 1

Eff Date: 01/01/1900

All Dates/Revs

Creamy Tomato Sauce Bottled, 28 oz.

Compare BOMs - BOM Selections inquiry page

Baseline BOM (BOM1)

- Item ID

Select an item for the baseline BOM.
- 

Click the Item Search button to access the Item Search Criteria page and select a different item.
- BOM Code

Select a BOM code for the baseline BOM. You can select any valid BOM code, but regardless of the depth that you select, the system calculates all lower levels based on the primary BOM code.
- Eff Date

Enter the effective date for the baseline BOM if you do not want to use all dates and revisions.
- All Dates/Revs

Select to compare all effective dates and revisions for the baseline BOM.

Target BOM (BOM2)

- Item ID

Select an item for the baseline BOM.
- BOM Code

Select a BOM code for the baseline BOM. You can select any valid BOM code, but regardless of the depth that you select, the system calculates all lower levels based on the primary BOM code.
- Eff Date

Enter the effective date for the baseline BOM if you do not want to use all dates and revisions.
- All Dates/Revs

Select to compare all effective dates and revisions for the baseline BOM.

Displaying BOM Component Details Differences

Access the Compare BOMs - Component Detail: Component Details page.

BOM Selections

Component Detail

Assy Header

Component Details

Attachments

Documents

Reference Designators

Dimensions

Substitutes

Unit: US012
BOM Type: Production

Baseline BOM (BOM1)

Target BOM (BOM2)

Item ID: 000000000000020024
Plain Sauce Bottled, 28oz
BOM Code: 1

Item ID: 000000000000020036
Creamy Tomato Sauce Bottled, 2
BOM Code: 1

Component Details

Customize | Find | [Grid Icon]

First 1-10 of 10 Last

Attributes

Rtg/BOM/PID

Text

[Filter Icon]

Differences	Component ID	Description	Comp Rev	Op Seq	Eff Date	Obs Date	Std UOM	Quantity	Per	Source Cd
Added.	000000000000020013	Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream		20	01/01/1900	12/31/2099	GAL	1000.0000	Order	Make
Chg BOM1	000000000000020025	Bottle, 28 oz.		10	01/01/1900	12/31/2099	EA	660.0000	Order	Buy
Chg BOM2	000000000000020025	Bottle, 28 oz.		10	01/01/1900	12/31/2099	EA	4500.0000	Order	Buy
Deleted.	000000000000020026	Plain Sauce - Processed		20	01/01/1900	12/31/2099	GAL	150.0000	Order	Make
Chg BOM1	000000000000020028	Screwtop		20	01/01/1900	12/31/2099	EA	660.0000	Order	Buy
Chg BOM2	000000000000020028	Screwtop		20	01/01/1900	12/31/2099	EA	4500.0000	Order	Buy
Added.	000000000000020029	Label - 28oz Creamy Tomato		30	01/01/1900	12/31/2099	EA	4500.0000	Order	Buy
Chg BOM1	000000000000020030	Packing Box		40	01/01/1900	12/31/2099	EA	55.0000	Order	Buy
Chg BOM2	000000000000020030	Packing Box		40	01/01/1900	12/31/2099	EA	375.0000	Order	Buy
Deleted.	000000000000020065	Label - 28oz Plain Sauce		30	01/01/1900	12/31/2099	EA	660.0000	Order	Buy

Compare BOMs - Component Detail - Component Details page: Attributes tab

The header data appears by default from the Compare BOMs - BOM Selections inquiry page.

Rtg/BOM/PID Tab

Select the Rtg/BOM/PID tab.

This page displays routing, BOM, and production ID differences between the selected BOMs.

Subs Exist If substitutes exist for a component, this field is selected.

Sub Supply If the component is supplied by a subcontractor, this field is selected.

See Also

[Chapter 8, "Maintaining Bills of Material," Adding Substitute Components, page 179](#)

Comparing Substitute Item Differences

Access the Compare BOMs - Component Detail: Substitutes page.

Substitute Items Tab

Select the Substitute Items tab.

The system displays the substitutes' differences, including substitute item ID, description, and the original component ID.

Attributes Tab

Select the Attributes tab.

The system displays the substitutes' differences, including substitute item ID, operation sequence, effective date, standard unit of measure, and conversion rate.

Comparing Assembly Outputs

Access the Compare BOMs - Assy Header: Outputs page.

Dates Tab

Select the Dates tab.

This page displays output date differences including information such as output type, output item, operation sequence, and effectivity dates.

Attributes Tab

Select the Attributes tab.

This page displays attribute differences including information such as output type, output item, quantity per, source code, serial control resource allocation, and cost allocation percentages.

Checking the BOM Verification Status

This section discusses how to:

- Display BOM verification status summaries.
- Delete BOM verification rows.
- Display BOM verification status details.

Pages Used to Check the BOM Verification Status

Page Name	Object Name	Navigation	Usage
BOM Verification	EN_BOM_VERIFY_REQ	Manufacturing Definitions, BOMs and Revisions, Identify Looping BOMs, BOM Looping Verification	Locate unwanted loops in BOMs.
Delete BOM Verification Rows	EN_BOM_VERIF_DEL	Manufacturing Definitions, BOMs and Revisions, Identify Looping BOMs, Delete Verification Details, Delete BOM Verification Rows	Delete records created by the BOM Verification Request.
BOM Verification Status - BOM Verification Status	EN_BOM_VERIFY_STAT	Manufacturing Definitions, BOMs and Revisions, Identify Looping BOMs, BOM Verification Status, BOM Verification Status	View, on a summary level, a list of all verified BOMs or a list of all looping BOMs discovered after running the Verification Request.
BOM Verification Status - BOM Verification Detail	EN_BOM_VERIFY_DET	Manufacturing Definitions, BOMs and Revisions, Identify Looping BOMs, BOM Verification Status, BOM Verification Status Click a Detail link.	View a detailed list of all looping BOM components discovered as a result of running the BOM Verification Request.

Displaying BOM Verification Status Summaries

Access the BOM Verification Status page.

All BOM paths verified	Select this option to display all verified BOMs by top-level assembly.
BOMs with errors only	Select this option to display all looping BOMs, along with the specific looping lower-level assembly and component items.
Search	Click to check for looping BOMs. If the system does not detect any loops, a message appears. If the system detects any looping BOMs, they appear at the bottom of this page.
Details	Click this link for any top-level assembly with errors to access the BOM Verification Status - BOM Verification Detail page.

Deleting BOM Verification Rows

Access the Delete BOM Verification Rows page.

The verification request process adds a series of records to the BOM Explosion table. These records take up space and are of no use if there are no looping BOMs. You can use this page to delete these records by process instance.

Displaying BOM Verification Status Details

Access the BOM Verification Status - BOM Verification Detail page.

Lvl (level)	Displays the level where the loop in a BOM occurred.
Component ID	Displays the specific component where the loop in a BOM occurred.
BOM Code	Displays the BOM code for the BOM in which the loop occurred.
Pos Nbr (position number), Op Seq, Eff Date, Obs Date, and Associated Primary BOM	Displays this additional information for the BOM in which the loop occurred.

Viewing Item Where-Used Information

This section discusses how to select item where-used information.

Pages Used to View Item Where-Used Information

Page Name	Object Name	Navigation	Usage
Item Where Used	EN_BOM_WHEREUSED	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Item Where Used	Display all the BOMs on which an item appears. This information is useful when you want to analyze the impact a change to an item can have on all existing BOMs.
Item Where Used (report)	EN_WHEREUSED_RPT	Manufacturing Definitions, BOMs and Revisions, Reports, Item Where Used, Item Where Used	Generate the Components/Substitutes Where Used report that lists all BOMs on which a component appears. This information is useful when you want to analyze the impact a component change can have on all existing BOMs.

See Also

PeopleSoft Engineering 8.8 PeopleBook, “PeopleSoft Engineering Reports,”
ENS2000 - Item Where Used Report

Selecting Item Where-Used Information

Access the Item Where Used page.

Item Where Used

*Search:

Components Only

Search

Unit:

US012

Item ID:

000000000000020008

Tomatoes, Chopped, and Mixed

*BOM Type:

Production

Std UOM:

GAL

BOM Code:

1

Source Cdt:

Make

Eff Date:

01/01/1900

☒ All Dates/Revs

Levels Up:

1

☐ Top Levels only

*View:

Non-Indented

Component/Substitute Where Used

Customize | Find |

First 1-3 of 3 Last

Details

Attributes

Lvl	Item ID	Description	BOM Code	Op Seq	Quantity
1	000000000000020013 <-	Creamy Tomato Sauce - Processe	1	20	975.0000
1	000000000000020020 <-	Classic Spaghetti Sauce - Proc	1	30	975.0000
1	000000000000020039 <-	Canned Tomatoes	1	20	12.0000

Item Where Used page - Details tab

- Search

Select to display only certain types of data. Values are *Components Only*, *Components and Substitutes*, *Outputs Only*, and *Substitutes Only*.
- Unit, Item ID, BOM Type, Eff Date (effective date) or Revision, BOM Code, and Levels Up

Enter this information about the item, as appropriate.
- Levels Up

Enter 1, to see just the item’s parent assembly. The larger the number, the higher the level; for example, level 3 is three levels higher in the BOM structure than the item. To view just the final end item in which the selected item is an item, select Top Levels only. If you have requested more than one level, an arrow appears next to the item’s immediate parent in the Item ID field.
- Levels Up

Note. Do not confuse the Levels Up field with the Depth field on the BOM inquiry pages. The Levels Up field looks up the BOM structure; Depth looks down the structure. The Levels Up field is available only for BOM code 1.

Search

Click to retrieve the selected item where-used information.

If you selected *Components Only* or *Components and Substitutes* in the Search field, the system displays all higher-level subassemblies or assemblies that contain the selected item. You’ll also see the levels at which the items appear in the higher-level items. The left arrow (←) in the display points to the item that directly uses the item selected.

Components and Substitutes and *Substitutes Only* appear if the component for the item is a substitute.

If you selected *Outputs Only* in the Search field, the system displays information according to output type, including:

- Item ID

- BOM code
- Operation sequence
- Output quantity

If the component is revision-controlled, a Comp Rev field also appears as a search parameter. If you enter a component revision, this page returns all assemblies where that component matches or is blank. If you leave the component revision blank, the inquiry returns assemblies that use any revision of the component.

See Also

Chapter 2, “Understanding PeopleSoft Manufacturing,” Component Use Up, page 28

CHAPTER 11

Defining Resources

This chapter provides an overview of resources and discusses how to:

- Define resources.
- View where-used resource data.

Understanding Resources

This section lists common elements and discusses resource setup.

Common Elements Used in This Chapter

Crew Status, Machine Status, and Tool Status

This field is for informational purposes. Values are:

- *Available*: The resource is available for use.
- *Pending*: A new resource that is not yet approved for use in production and cannot be associated with a work center.
- *Unavail*: (unavailable): The crew is not available, but you can associate it with work centers, tasks, routings, and production. This is only an option for Crew Status.
- *In Repair*: The resource is in repair, but you can associate it with work centers, tasks, routings, and production. This is not an option for Crew Status.
- *Schd Maint* (scheduled maintenance): The resource is scheduled for maintenance. This is not an option for Crew Status.

Resource Setup

Resources are the crews, machines, and tools used at work centers to complete tasks. Resources are consumed for the duration of a task and can be reused after the task is complete. You can also use PeopleSoft Supply Planning to analyze resources.

Before using resources, consider these steps:

1. If you are using PeopleSoft Asset Management, you can optionally link PeopleSoft Manufacturing machines and tools to asset information maintained in PeopleSoft Asset Management.

To make that link, define machines and tools as assets in PeopleSoft Asset Management. This link enables you to view detailed machine and tool asset, service, and repair information from the Define Machine and Define Tool pages.

2. Define tools as a non-costed item in PeopleSoft Inventory to maintain quantity on-hand information for tools, as well as stock them in regular inventory locations.

This enables you to purchase, receive, and stock tools without including them in your asset balance.

See Also

[Chapter 7, “Understanding PeopleSoft Bills of Material and Routings,” page 141](#)

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Item Control Values”

Defining Resources

To define resources, use the Define Crew Resource component (EN_CREWS), Define Machine Resource component (EN_MACHINES), and the Define Tool Resource component (EN_TOOLS).

This section provides an overview of resource planning and discusses how to:

- Define crew attributes.
- Define machine attributes.
- Define the machine manufacturer.
- Define tool attributes.
- Define the tool location.
- Define the tool manufacturer.

Pages Used to Define Resources

Page Name	Object Name	Navigation	Usage
Crews - Define Crew	EN_CREW	Manufacturing Definitions, Resources and Routings, Resources, Crews, Define Crew	Define crews that you can later associate with work centers.
Crews - Text	EN_CREW_TEXT	Manufacturing Definitions, Resources and Routings, Resources, Crews, Text	Enter crew text.
Machines - Define Machine	EN_MACHINE	Manufacturing Definitions, Resources and Routings, Resources, Machines, Define Machine	Define the machines that you can later associate with work centers on your routings.
Machines - Manufacturer	EN_MACH_MANUFACTUR	Manufacturing Definitions, Resources and Routings, Resources, Machines, Manufacturer	Define the machine manufacturer and associated data.
Machines - Text	EN_MACH_TEXT	Manufacturing Definitions, Resources and Routings, Resources, Machines, Text	Enter machine text.
Tools - Define Tool	EN_TOOL	Manufacturing Definitions, Resources and Routings, Resources, Tools, Define Tool	Define tools that you can later associate with work centers on your routings.
Tools - Location	EN_TOOL_LOCATION	Manufacturing Definitions, Resources and Routings, Resources, Tools, Location	Define the tool location, including the inventory attributes and typical storage location.
Tools - Manufacturer	EN_TOOL_MANUFACTUR	Manufacturing Definitions, Resources and Routings, Resources, Tools, Manufacturer	Define the tool manufacturer and associated data.
Tools - Text	EN_TOOL_TEXT	Manufacturing Definitions, Resources and Routings, Resources, Tools, Text	Enter text for a tool.

Defining Crew Attributes

Access the Crews - Define Crew page.

Crew Size

The system uses crew size as the default value on work center, task, routing, and production pages if, on those pages, you specify the crew as the primary crew. When you specify a work center on an item's routing, the system uses crew size as a factor when it calculates the item's labor costs.

Calendar Code

Select an associated calendar code. Define calendar codes on the Calendar Code Definition page.

See Also

Chapter 4, “Establishing Production Calendars,” Defining Calendar Codes, page 53

Defining Machine Attributes

Access the Machines - Define Machine page.

Machine Status

Values are:

- *Available*: Machine is available for use.
- *In Repair*: Machine is in repair, but you can associate it with work centers, tasks, routings, and production.
- *Pending*: A new machine is not yet approved for use in production and cannot be associated with work centers.
- *Sched Maint* (scheduled maintenance): Machine is scheduled for maintenance.

This field is informational only.

Link to AM (link to asset management)

To track the machine as an asset by linking an asset number to the tool, select *AM Asset*.

The PeopleSoft Asset Management Business Unit and Asset ID fields then become active.

If you select *Non-AM*, the system does not make a link with PeopleSoft Asset Management.

AM Asset (asset management asset)

Click to view the machine’s asset information with the Review Assets pages in PeopleSoft Asset Management.

AM Service (asset management service)

Click to view the machine’s asset service and repair details with the Review Service/Repair Detail pages in PeopleSoft Asset Management.

See Also

PeopleSoft Asset Management 8.8 PeopleBook, “Adding and Maintaining Assets”

PeopleSoft Asset Management 8.8 PeopleBook, “Tracking Insurance, Repairs and Service”

Defining the Machine Manufacturer

Access the Machines - Manufacturer page.

Enter or change the manufacturer information for the selected machine:

- Serial ID
- Manufacturer name
- Model
- Product version
- Production date

- Plant
- Contact

Note. This page is only for informational purposes. If you have entered similar data in PeopleSoft Asset Management, you do not need to enter this information here.

Defining Tool Attributes

Access the Tools - Define Tool page.

Note. Defining tools is optional.

Tool Status	Values are: • <i>Available:</i> Tool is available for use. • <i>In Repair:</i> Tool is in repair, but you can associate it with work centers, tasks, routings, and production. • <i>Pending:</i> A new tool isn't yet approved for use in production and can't be associated with work centers. • <i>Sched Maint:</i> Tool is scheduled for maintenance. You can associate it with work centers, tasks, routings, and production. This field is informational only.
Link to AM (link to asset management)	To track the tool as an asset by linking an asset number to the tool, select <i>AM Asset</i> . The PeopleSoft Asset Management Business Unit and Asset ID fields then become active. If you select <i>Non-AM</i> , the system does not make a link with PeopleSoft Asset Management.
AM Asset (asset management asset)	Click to view the tool's asset information with the Review Assets pages in PeopleSoft Asset Management.
AM Service (asset management service)	Click to view the tool's asset service and repair details with the Review Service/Repair Detail pages in PeopleSoft Asset Management.

Defining the Tool Location

Access the Tools - Location page.

If you have previously defined the tool as an item in PeopleSoft Inventory, you can enter the tool's inventory attributes.

Cage Number	Enter an inventory cage number. This field is informational only.
Item ID	Select an ID for a non-costed item.

Area, Lev 1 (level 1), **Lev 2** (level 2), and **Lev 3** (level 3) (Optional) Select the inventory storage area and inventory location where this tool is stored. The system displays the number of storage levels defined for each storage area.

Defining the Tool Manufacturer

Access the Tools - Manufacturer page.

Enter or change the any of the manufacturer information for the selected tool:

- Serial ID
- Manufacturer name
- Model
- Product version
- Production date
- Plant
- Contact

Note. This page is for informational purposes only. If you have entered similar data in PeopleSoft Asset Management, do not need to enter this information here.

Viewing Where-Used Resource Data

This section provides an overview of resource searching and lists the pages used to view where resources are used on work centers, tasks, routings, and in production.

Understanding Resource Searching

When viewing where-used resources data, you control the data and pages that you see by selecting resources and by changing the search selection.

Note. The system searches for the use of any individual crew, machine, or tool simultaneously. It does not search for cases where a combination of the resources is used, but rather where any one of them is used.

You can search for production, routings, tasks, work centers, or all of these. The Search field on a particular page is automatically populated by the value that mirrors the page. For example, if you are on the Used on Work Centers page, the default value in the Search field is *Work Centers*. If you search for the default value, the system populates the current page with data after you click the Search button.

If you search for another value or search for all values, you move to the page that corresponds with your choice. For example, if you are on the Used on Work Centers page, and you select *Only Task*, in the Searchfield, you move to the Used on Tasks page. In this example, you then click the Search button to view the tasks on which the selected resources are used. Prior to clicking the Search button, you can change the selected resources that are populated by the previous page.

Pages Used to View Where-Used Resource Data

Page Name	Object Name	Navigation	Usage
Used on Work Centers	EN_RSRC_WHERE_WC	Manufacturing Definitions, Resources and Routings, Resources, Review Resources Where Used, Used on Work Centers	View resources used on work centers.
Used on Tasks	EN_RSRC_WHERE_TASK	Manufacturing Definitions, Resources and Routings, Resources, Review Resources Where Used, Used on Tasks	View resources used on tasks.
Used on Routings	EN_RSRC_WHERE_RTG	Manufacturing Definitions, Resources and Routings, Resources, Review Resources Where Used, Used on Routings	View resources used on routings.
Used in Production	EN_RSRC_WHERE_PRD	Manufacturing Definitions, Resources and Routings, Resources, Review Resources Where Used, Used in Production	View resources used in production.
Resources Where Used Report	RUN_ENS1004	Manufacturing Definitions, Resources and Routings, Resources, Resources Where Used Report, Resources Where Used Report	Lists where resources are used on work centers, tasks, routings, and in production.

See Also

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” ENS1004 - Resources Where Used Report, page 663

CHAPTER 12

Defining Work Centers

This chapter provides an overview of work centers and discusses how to:

- Define work centers.
- View work center where-used data.
- Copy work centers.

See Also

Chapter 7, “Understanding PeopleSoft Bills of Material and Routings,” page 141

Understanding Work Centers

A work center can consist of one or more people and machines and can represent a logical grouping of machines, a department, or a cost center. You can assign each operation or task on a routing to a work center in which the operation or task takes place. Additionally, you can assign one or more resources (crew, machine, or tool) to each work center.

Prerequisites

Before you begin to fully use the work center functionality, complete a few setup steps:

1. If you want to associate different resources to work centers, you must define your resources prior to creating and maintaining work centers.
2. If you want to maintain work center exceptions to the production calendar, then create alternate calendar codes and create the calendar for the alternate calendar code using the Calendar Code Definition page.

You can associate a calendar code with each work center whose operating times differ from the production calendar defined for the business unit.

3. To define conversion codes by work center, as opposed to by task, set the business unit rate maintenance to *By Work Center* by using the Rate Maintenance/Defaulting group box on the MFG Business Unit Options page.
4. Define your conversion codes and their associated labor, machine, and overhead rates or costs within PeopleSoft Cost Management.

You can assign a conversion code and up to four conversion overhead codes to the work center.

5. Since you must associate a WIP inventory location with each work center, these inventory locations must be defined prior to adding work centers.

See Also

Chapter 11, “Defining Resources,” page 243

Chapter 3, “Defining Your Business Unit Structure,” Setting Up Manufacturing Business Unit Options, page 34

PeopleSoft Managing Costs 8.8 PeopleBook, “Defining the Cost Foundation for Makeable Items”

Common Elements Used in This Chapter

Work Center	Unique identifier for the work center.

Defining Work Centers

To create and maintain work centers and their associated resources, conversion codes, text, locations, departments, and distribution types by business unit, use the Work Center Definition component (WORK_CENTERS).

If you have enabled PeopleSoft Workflow and when you add a new work center, or when you change any attribute in an existing work center, the system optionally sends the Workcenter Change workflow notification to the roles that you’ve defined, such as an engineering manager or cost accountant.

This section discusses how to:

1. Define work center attributes.
2. Define work center resources.
3. Define work center planning options.
4. Associating conversion codes to work centers.
5. Associating conversion overhead codes to work centers.
6. View work center where used data.

See Also

Chapter 1, “Getting Started with PeopleSoft Manufacturing,” page 3

Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649

Pages Used to Define Work Centers

Page Name	Object Name	Navigation	Usage
Define Work Center - Definition	EN_WORK_CENTER	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Work Centers, Define Work Center, Definition	Define and maintain work centers for use on routings.
Define Work Center - Text	EN_WORK_CENTER_TXT	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Work Centers, Define Work Center, Text	Enter up to 254 characters of text to associate with the work center.
Define Work Center - Attachments	EN_WC_ATT	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Work Centers, Define Work Center, Attachments	Attach work center-related documents. Click the Get Attachment button to launch the multimedia object that is attached to the work center. Select the type of media that you want to attach and enter the file name.
Define Work Center - Resources	EN_WC_RESOURCE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Work Centers, Define Work Center, Resources	Define work center resources.
Define Work Center - Planning Opts (planning options)	EN_AGGREG_WC	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Work Centers, Define Work Center, Planning Opts	Define the planning options associated with the work center.
Define Work Center - Conv Code (conversion code)	EN_WC_CONCODE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Work Centers, Define Work Center, Conv Code	Associate conversion codes with the corresponding labor and machine rates for the work center.
Define Work Center - Conv Ovhd Codes (conversion overhead codes)	EN_WC_CONOHCODE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Work Centers, Define Work Center, Conv Ovhd Codes	Associate work center conversion overhead codes.

Defining Work Center Attributes

Access the Define Work Center - Definition page.

Define Work CenterResourcesPlanning OptsConv CodeConv Qvhd Codes

DefinitionTextAttachments

Unit:US008

Work Center:BR-ASSY

Description:Brake Assembly Work Center

Short Desc:Brake Assy

Work Center Location:

Department:54000Assembly

Distrib. Type:ENGINEEREngineering

Average Daily Hours:16.00

Work Center Calendar Code

Calendar Code:

Run-time Calendar Code:

Work Center WIP Location

	*Area	Level 1:	Level 2:	Level 3:	Level 4:
Owned:	SA	AIS1	ROW1	BIN1	
Non-Owned:	NOWN	BIN			

Define Work Center - Definition page

Prior to defining your routings, you can define a master dictionary of tasks or jobs that can be performed at work centers.

- Department (optional)

Informational use only and used for reporting purposes.
- Distrib. Type (distribution type) (optional)

Predefine distribution types within PeopleSoft Cost Management. When used in conjunction with the assembly completion transaction, they can determine the general ledger accounts when posting earned conversion costs, such as labor, machine, subcontracting, and overhead costs.

The distribution type automatically defaults to the values defined within PeopleSoft Inventory for the transaction group for earned conversion costs.
- Average Daily Hours

Average number of hours that the work center is in operation each day. This field determines the operation’s setup, fixed run, run rates, and post-production times in hours, when the time unit for an operation is expressed in days for planning and costing purposes.

For example, suppose that you set the run rate for an operation to 100 units per day and the work center’s average daily hours to 8 hours, the system converts this to 100 units per 8 hours.
- Default Queue Time

The default amount of time that a job must wait before it can be processed by this work center. The value is copied to a task when you create a task and specify queue time on the task. The system copies it to a routing when you assign a task to an operation sequence on the routing.
- Queue Time Unit

Use to designate whether the default queue time is in *Minutes*, *Days*, or *Hours*.

Note. If you change the average daily hours, and you have run rates on routing operations, expressed in terms of units per day, revisit all routing operations that are using the work center and adjust your run rates accordingly.

Note. Default Queue Time and Queue Time Unit do not appear if you are using PeopleSoft Supply Planning.

Work Center Calendar Code

Calendar Code

You can associate a calendar code with the work center. Use the Calendar Code Definition page to define calendar codes.

If you intend to use a production calendar, as opposed to a five-day work week definition, define at least one Calendar Code and the associated calendar. You can optionally define alternate calendar codes with alternate calendars. A calendar code entered here indicates that the Work Center has different hours of operation than the business Unit.

If you have enabled PeopleSoft Workflow and when you change a work center calendar code, the Work Center Calendar Code Change workflow notifies the planner of the change. The planner may want to reschedule production.

Run-time Calendar Code

Display-only field that indicates which calendar code is being used for scheduling the work center.

When you either associate a Calendar Code that is different from the current Run-time Calendar Code, or when you associate a calendar code for the first time, the system optionally sends a workflow notification to selected roles that you have defined. This workflow notifies the role, such as a production control manager, that the calendar originally used for scheduling is not synchronized with the calendar code that you just specified for the work center.

See [Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649](#).

Work Center WIP Location

You can select the WIP location to which material associated with the operation is delivered for use in production. This is also the WIP location from which material is consumed upon operation or assembly completion, if the component or production area/item's issue method is set to *Issue* or *Replenish*.

Owned and Non-Owned

Indicate a WIP location for both owned and non-owned inventory. The system can only issue owned components to (and consume them from) owned WIP locations. Likewise, the system can only issue non-owned material to (and consume it from) non-owned locations.

Consigned inventory is issued to non-owned WIP locations. Once consumed, it is considered owned. If you never use consigned inventory, maintain non-owned inventory, or never issue non-owned inventory to production, you can leave these fields blank.

Note. If you are using consigned components, you must define both an owned location and a non-owned location. Consigned components will be consumed from a non-owned location but, once consumed, can only be returned to an owned location.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook

Chapter 4, “Establishing Production Calendars,” Defining Calendar Codes, page 53

Defining Work Center Resources

Access the Resources page.

Define Work Center
Resources
Planning Opts
Conv Code
Conv Ovhd Codes

Unit: US008
Work Center: BR-ASSY Brake Assembly Work Center

Costing Resource Defaults

Crew Size: 1.00 Machine Resources: 1.00

Resources Used on Work Centers
Customize Find View All First 1-3 of 3

Resource Type	Crew/Machine/Tool	Description	Status	Priority
Primary Crew	ASSY03	Assembly Crew 3	Available	10
Alt Crew	ASSY01	Assembly Crew 1	Available	10
Primary Machin	BRAKE01	Brake Assembly Equipment 1	Available	10

Work Center - Resources page

Costing Resource Defaults

Crew Size (optional) Number of people at the work center. Appears by default from the *Primary Crew* selected for the work center definition.

Machine Resources (optional) Number of machines at the work center. If multiple machines exist in the work center, and you want to factor their costs into an item's cost, enter that factor here.

While these are optional fields, the system considers the crew size and machine resources when it calculates standard labor and machine costs for items in the standard cost calculations.

In specific cases, the system also considers crew size and machine resources when it calculates the per unit cost of an item as well as the earned labor and machine amounts within PeopleSoft Manufacturing. The system only uses crew size and machine resources in labor and machine cost calculations if the value of the labor and machine rate is defined as a rate per hour, rather than a rate per unit. If the value is per unit, it's expected to be factored in and the system doesn't include it in the calculation. However, if the rate is per hour, the system considers and uses the crew size in the calculation.

The system only considers crew size and machine resources for run-time labor and machine calculations. Setup times, for example, are typically of fixed duration and amount. Therefore, it is assumed that you have already factored in crew size and machine resources when you define them.

To better understand an item's cost calculation and the earned labor cost calculations, let's look at a few equations.

For setup time operations, the item's cost calculation equation is:

Set up labor or machine rate per hour $\times$ set up time (expressed in hours) = Set up cost

Set up cost / item's average order quantity = Per unit set up cost

When calculating earned setup costs in PeopleSoft Manufacturing, the system calculates the setup cost for the production quantity. It does not divide by the average order quantity.

For run-time operation, the cost calculation equation differs, depending on whether the labor or machine rate is a rate per unit or rate per hour. If it's a rate per unit, then the applicable per unit item cost equation is the labor or machine rate per unit. To calculate the earned labor or machine run cost, the system uses this equation:

Run labor or machine rate $\times$ units completed = Cost

If the labor or machine rate is a rate per hour, then the applicable per unit item cost equation is as follows:

Labor Crew size $\times$ labor rate for run $\times$ run time (expressed in hours) = Labor run cost

Machine Machine resources $\times$ machine rate for run $\times$ run time (expressed in hours) = Machine run cost

To calculate the earned labor or machine run costs in production, the system multiplies the per unit cost by the quantity completed at the operation.

The system copies the resources to the task when you enter the work center for the task. It copies the resources to the routing when you specify the task for an operation, or, if you are not using tasks, when you specify the work center for the routing operation. If you choose not to define resources, you can enter the crew size and number of machines used in the work center here.

Resources Used on Work Centers

Resource Type, Crew/ Machine/Tool Select a type and resource to associate with the work center. You can only associate one *Primary Tool*, *Primary Crew*, and *Primary Machine* with the work center, but you can designate unlimited *Alternate Crews*, *Machines*, or *Tools*. A primary resource is the preferred resource to be used in production.

You can assign tools, crews, and machines to multiple work centers.

Status Indicates the availability of a resource for this work center.

Priority A whole number ranking, which you define, indicating which resource will have preference over another when considering multiple resources. The lower the priority assigned to a resource, the more likely it is that the resource will be chosen. You can manually specify a priority for the task resource or work center resource. The priority appears by default onto the routing. The primary resource for tool, crew, and machine automatically changes to a priority of 10. Other resources of like type automatically change to a priority of 20. The priority allows you to designate the order in which planning should consider a resource.

If you are using PeopleSoft Supply Planning, you must enter at least one resource in the resource list (crew or machine) at each work center. PeopleSoft Supply Planning only uses the priority that you define on the routing.

Note. To specify a resource on a task or routing, first associate it with the work center in which the task or operation is performed.

Changing the resources for a work center does not change the resources for any routing operation that is using the work center. Furthermore, you cannot delete a work center resource if it is being used on a task or routing.

The system only copies primary resources when it copies routings to production.

Defining Work Center Planning Options

Access the Planning Opts page.

The screenshot shows the 'Define Work Center - Planning Opts' page. At the top, there are five tabs: 'Define Work Center', 'Resources', 'Planning Opts' (which is active), 'Conv Code', and 'Conv Qwhd Codes'. Below the tabs, the following fields are visible:

- Unit:** US008
- Work Center:** BR-ASSY Brake Assembly Work Center
- Resource Class:** Time (dropdown menu)
- Bucket Size:** Weekly (dropdown menu)
- Allocation Strategy:** Proportional (dropdown menu)
- Availability %:** 100

On the right side of the form, there are three unchecked checkboxes:

- ☐ Ignore Violations
- ☐ Continuous Scheduling
- ☐ Ignore Capacity

At the bottom, there is a table titled 'Capacity/Multiplier/Units Set'. The table has two main columns: 'Effective Date' and 'Multiplier / Units'. The first row shows '01/01/1900' in the date field and '5.00' in the multiplier field. There are also navigation buttons like 'First', 'Last', and '1 of 1'.

Define Work Center - Planning Opts page

Resource Class

Since work centers are modeled as aggregate resources in PeopleSoft Supply Planning, define your work center as either an aggregate resource by time or an aggregate resource by unit. Values are:

- **Time:** You can plan for all resources based on the amount of time available in the time bucket that you select.
- **Unit:** You can plan for all resources based on the number of units the resources can produce in a time bucket. The default Resource Class is *Time*.

Bucket Size

Enter your summation period, the period over which you are aggregating. Values are *Daily*, *Weekly*, and *Monthly*. The default is *Weekly*.

Allocation Strategy

Determines how you are going to spread the time and unit over the bucket size. Values are *Start*, *Finish*, and *Proportional*. This answers the question: if the task is stretched across two or more buckets, should the task, in its entirety, be placed in the first bucket, the last bucket, or spread proportionally across all buckets? The default is *Proportional*.

Availability %	Define a percentage of the total capacity time that the resource is available for use. You might take into consideration scheduled maintenance or include a buffer for unexpected repairs when you define the percentage. You can change the resource availability percentage for all the aggregate resources. The default is <i>100</i> .
Ignore Violations	Select to prevent the solvers from analyzing and resolving capacity issues impacting the work center. When this check box is selected, capacity issues—although not recognized by the solvers—will appear in the Supply Planning Violations workbench if they are before the capacity fence defined for the planning instance. By selecting the Ignore Violations check box on non-critical work centers, you enable the solvers to ignore these work centers and focus on critical work centers for capacity repair. Clear this check box to generate <i>what-if</i> scenarios.
Continuous Scheduling	Used as a routing operation default. Select to complete the corresponding operation in a single run of continuous valid calendar time, with no gaps allowed between shifts.
Ignore Capacity	Used as a routing operation default. Select to prevent solvers from considering the corresponding operation as required capacity for the work center.

Capacity Multiplier/Units Set

This is used by the system to determine the available capacity on a work center. Because these sets are effective-dated, you can use the Capacity Multiplier/Units to vary the work center's available capacity over time.

If you define the work center as an aggregate resource by time, the system uses the capacity multiplier to represent the number of identical work centers that exist for scheduling purposes.

For example, suppose that you define a work center as an aggregate resource by time with weekly buckets, and it has a Capacity Multiplier of 2, with an effective date of March 5, 2003. Then, beginning on March 5, 2003, PeopleSoft Supply Planning views this aggregate resource as two identical work centers that it can use simultaneously for jobs. If the work center has 40 hours of available calendar time in a weekly bucket, then the available capacity for the bucket, based on a Capacity Multiplier of 2, would be 80 hours total. PeopleSoft Supply Planning uses this capacity multiplier to determine the work center's available capacity until the next Capacity Multiplier becomes effective.

If you define the work center as an aggregate resource by unit, the system uses the capacity units to represent the number of units that can be produced on that work center in an entire bucket (assuming a 24 hours/day, 7 days/week calendar during the entire bucket).

For example, suppose that you define a work center as an aggregate resource by unit with weekly buckets. If this resource has capacity units of 100 with an effective date of April 10, 2003, then, beginning on April 10, 2003, PeopleSoft Supply Planning views this work center as being capable of producing 100 units per week, based on a 24-hour/day, 7 days/week calendar. The actual available capacity on this work center is then calculated by factoring in the actual production calendar during each weekly bucket. If the work center has 40 hours of available calendar time in a weekly bucket, then the available capacity for the bucket, based on a capacity unit of 100, would be $(100 \text{ units} \times 40 \text{ hours per week}) / (24 \text{ hours per day} \times 7 \text{ days per week}) = 24 \text{ units}$. PeopleSoft Supply Planning uses these capacity units to determine the work center's available capacity until the next capacity multiplier becomes effective.

Associating Conversion Codes to Work Centers

Access the Conv Code page.

Define Work Center
Resources
Planning Opts
Conv Code
Conv Ovhd Codes

Unit: US008
Work Center: BR-ASSY Brake Assembly Work Center
Conversion Code: Assembler

Conversion Rates				
Conversion Rate Type	Rate	Per	Cost Elmnt	Short Description
Labor Setup Rate	9.5000	Hour	300	Set Up Lab
Labor Fixed Run Rate	9.0000	Hour	301	Run Labor
Labor Run Rate	0.1500	Unit	301	Run Labor
Labor Post Prod Rate	5.5000	Hour	302	Post Prod
Machine Setup Rate	8.8500	Hour	400	Set Up Mac
Machine Fixed Run Rate	16.7500	Hour	401	Run Machin
Machine Run Rate	14.5000	Hour	401	Run Machin
Machine Post Prod Rate	18.0000	Hour	402	Post Prod

Work Center - Conv Code page

Enter the conversion code that you want to associate with the work center.

Conversion Codes

The system copies conversion codes and their associated labor, machine, and overhead rates and costs into the item's routing when you assign the work center to a routing operation. The system uses the conversion codes to calculate the cost of the operation using the work center. Conversion costs are optional, but if you define them, the system can calculate the labor, machine, and overhead costs associated with manufactured items during cost roll-ups. When the routing is copied, the system uses PeopleSoft Manufacturing costs to calculate the earned labor, machine, and overhead costs that are added to the WIP inventory value when operation or end item completions are recorded.

Conversion Rates

The system displays the conversion rates from the Costing Conversion Rates page. The rates displayed are from the frozen conversion rate and costs that were updated during the last cost update and revaluation. More specifically, when production costs are updated using a selected cost type and version, the system copies the conversion rates and conversion overhead rates, used to calculate the item costs, into a frozen conversion rate record. The system uses those frozen rates to calculate earned labor, machine, and overhead costs when end items are completed at operations or to stock.

Additionally, the system uses the rates to calculate the cost of end items scrapped during manufacturing. You must have a labor or machine rate or cost for each costing operation time type specified on the routing. For example, suppose that you enter a costing labor setup time on the routing, there must be a corresponding labor setup rate per hour, for the system to calculate the operation cost and include it in the item's cost.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, “Defining the Cost Foundation for Makeable Items”

Associating Conversion Overhead Codes to Work Centers

Access the Conv Ovhd Codes (conversion overhead codes) page.

Define Work Center
Resources
Planning Opts
Conv Code
Conv Ovhd Codes

Unit: US008
Work Center: BR-ASSY Brake Assembly Work Center

Ovhd	Description	Type	Ovhd Rate	Ovhd %	Cost Elmnt	Short Desc
6501	Assembly	% Lab Amt		55.0	500	Ovhd - Lab
6504	Depreciation	Amt/Mach H	3.8500		501	Ovhd - Mac
6505	Administration	Per Unit	0.6500		502	Ovhd per U

Conversion Overhead Codes page

Enter the Ovhd code that you want to associate with the work center. The system displays the overhead rates from the Conversion Ovhd Codes page. The rates displayed are from the frozen conversion overhead rates and costs that were updated during the last cost update and revaluation. More specifically, when production costs are updated using a selected cost type and version, the system copies the conversion rates and conversion overhead rates, used to calculate the item costs, into a frozen conversion rate record. The system uses those frozen rates to calculate earned labor, machine, and overhead costs when end items are completed at operations or to stock. You can associate up to four codes with a work center.

Note. The system copies the overhead rates and costs into the item’s routing when you assign the work center to a routing operation. The system uses these codes to calculate the cost of the operation that is using the work center.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, “Defining the Cost Foundation for Makeable Items”

Creating Work Center Groups

PeopleSoft Manufacturing allows you to define work center groups. This enables you, within PeopleSoft Supply Planning, to analyze aggregate capacity and detail resource usage for a subset of work centers contained in a planning instance.

To create a work center group, all work centers must share the same:

- Allocation Strategy
- Resource class
- Bucket size

Page Used to Define Work Center Groups

Page Name	Object Name	Navigation	Usage
Work Center Groups	EN_WC_GRP_PG	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Work Center Groups	Define work center groups.

Defining Work Center Groups

Access the Work Center Groups page.

Work Center Groups

Business Unit: US008
 ***Allocation Strategy:** Proportion

Work Center Group: PAINT
 ***Resource Class:** Unit

Description: Painting Work Centers
 ***Planning Bucket Size:** Daily

Work Centers

Customize | Find | First 1-3 of 3

*Work Center	Description	Allocation Strategy	Resource Class	Planning Bucket Size
PAINT01	Painting Work Center 1	Proportion	Unit	Daily
PAINT02	Painting Work Center 2	Proportion	Unit	Daily
PAINT03	Painting Work Center 3	Proportion	Unit	Daily

Work Center Groups page

To define a work center group:

1. Enter a *Description* of the new work center group.
2. Add the *Work Centers* to the group.
3. After you've added all the work centers, select the common *Allocation Strategy*, *Resource Class*, and *Planning Bucket Size*.
4. Click *Save* to create the work center group.

Viewing Work Center Where-Used Data

Using the Review Work Center Where Used component, you can view the tasks, routings, and production that are associated with a selected work center. On all pages in this component, you can control the data and pages that you see by changing the Search field selection. Initially, the page automatically changes to the choice that mirrors the page; for example, to *Only Tasks* for the Work Centers Used on Tasks page. You can change this to *Search All* or to search for *Only Tasks*, *Only Routings*, or *Only Production*.

If you select *Select All* after entering the business Unit and Work Center, the system populates all pages in this group with data. If you select only the default, the system populates only the visible page with data, after you click the Search button.

If you select something other than the default or *Search All*, you move to the page that corresponds with your choice. For example, if you are in the Work Centers Used on Tasks page, and you select *Only Routings*, you move to the Work Centers Used on Routings page. Then, click the Search button to view the routings that are associated with a specific work center. You can change the selected options, which appear by default from the previous page, before you click Search.

This section discusses how to:

- View work centers used on tasks.
- View work centers used on routings.
- View work centers used in production.

Pages Used to View Work Center Where-Used Data

Page Name	Object Name	Navigation	Usage
Work Center Where Used - Used on Tasks inquiry	EN_WC_WHERE_TASK	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Review Work Center Where Used, Used on Tasks	View tasks associated with a specific work center.
Work Center Where Used - Used on Routings (inquiry)	EN_WC_WHERE_RTG	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Review Work Center Where Used, Used on Routings	View routings whose operations use a specific work center.
Work Center Where Used - Used in Production	EN_WC_WHERE_PRD	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Review Work Center Where Used, Used in Production	View production IDs or production schedules that use a specific work center.
Work Centers Where Used Report	RUN_ENS1006	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Work Center Where Used Report	Generate the Work Centers Where Used Report (ENS1006).

See Also

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” ENS1006 - Work Centers Where Used Report, page 665

Viewing Work Centers Used on Tasks

Access the Used on Tasks inquiry page.

Select the Subcontracted check box if the task is a subcontracted operation.

Select the Count Point check box if the operation step is a count point. Count points allow you to record assembly completion information at preset operations. The default for this field comes from the Define Task - Definition page or the Routing Definition - Summary page.

Viewing Work Centers Used on Routings

Access the Used on Routings inquiry page.

Rtg State (routing state) Values are:

- *PR* (production)
- *EN* (engineering)

Routing Types Values are:

- *PR* (production)
- *TR* (teardown)
- *RW* (rework)

Routing code Indicates whether this routing is the primary (routing code *1*) or an alternate routing (routing codes 2-99) for the routing type

Op Seq (operation sequence) Indicates the operation step that uses the work center.

Viewing Work Centers Used in Production

Access the Used in Production inquiry page.

The system displays all production that uses the Work Center. It segregates production information by those items in a production area, using production IDs and the items that are managed by production schedules. In the case of production IDs, it displays the production IDs that have an operation that uses the work center. For all other production, the system displays the Production Area and the Item ID in which it is produced. In both cases, it displays the Op Seq along with the operation's Status, Start Date, Start Time, Due Date, and Due Time.

See Also

Chapter 14, “Structuring Routings,” Defining Routing Operations, page 286

Copying Work Centers

Rather than entering new work centers from scratch, you may find it easier to copy them and then make changes. Additionally, if another business unit's work centers have similar attributes, you can copy data from one business unit to another and then change the information for the specific business unit.

This section discusses how to:

- Copy work centers.
- Copy work center WIP locations.

Pages Used to Copy Work Centers

Page Name	Object Name	Navigation	Usage
Copy Work Centers - Work Centers	EN_WC_COPY	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Copy Work Centers, Work Centers	Copy a range of work centers, optionally including associated resources and text.
Copy Work Centers - Work Center WIP Locations	EN_WC_COPY_LOC	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Copy Work Centers, Work Center WIP Locations	Copy both owned and non-owned work center WIP locations.

Copying Work Centers

Access the Copy Work Centers - Work Centers page.

Work Centers
Work Center WIP Locations

*Unit:

Search

From Work Center: Brake Assembly Work Center

*To Work Center: Final Assembly Work Center

Target Defaults

Default BU:
☒ Copy Resrc
☒ Copy Att
☐ Overwrite WC

Default WC:
☒ Copy Text
☒ Copy Cap Mult

Copy Attributes

Customize | Find | View All |
First 1-2 of 2 Last

Copy WC	Work Center	Description	Copy Resrc	Copy Att	Copy Text	Copy Cap Mult	Target BU	Target Work Center	Overwrite
☒	BR-ASSY	Brake Assembly Work Center	☒	☒	☒	☒	US008	BR-ASSY	☐
☒	FI-ASSY	Final Assembly Work Center	☒	☒	☒	☒	US008	FI-ASSY	☐

Copy Work Centers - Work Centers page

Target Defaults

Default BU (default business unit)

Select the default business unit. If you are copying work centers within the same business unit, you can accept the default business unit. If you are copying to another business unit, select the business unit to which you want to copy as the Default BU.

Default WC(default work center)

Select *Source WC* (source work center) or *Leave Blank*. You can copy a single work center or a range of work centers.

If you select *Source WC*, the system displays the source work center codes in the Target Work Center field under Copy Attributes.

If you select *Leave Blank*, the Target Work Center field is blank. You can enter a different work center code in this field.

Search

Click to retrieve the selected information.

Copy Attributes

You can copy the resources, text, and attachments associated with the source work center, such as Copy Resrc (copy resources), Copy Text, Copy Att (copy attachments), and Copy Cap Mult (copy capacity multiplier) to the target work center. You can make the default that you want to overwrite an existing target work center Overwrite WC (overwrite work center) with information from the source work center.

Copy Cap Mult (copy capacity multiplier)

When you select this check box, the system creates a default record with an effective date of 01/01/1900 and a capacity multiplier of 1.0 for the new target work center.

Copy Resrc (copy resources)

If you select this check box, the system copies all of the resources in the source work center to the target work center, along with the resource priorities.

You can change all these selections on an individual basis, including clearing the Copy WC check box, if you decide not to copy the individual work center after all.

If you select *Leave Blank* as the Default WC in the page header, enter the work center codes for the target business unit. If the Target Work Center already exists in the target business unit, and you select the Overwrite check box, the system deletes all existing Target Work Center data and replaces it with the source work center data.

If the WIP inventory locations specified on the source work center do not exist in the target business unit or if you are using different levels of locations in the two business units, enter the WIP locations for the target work centers in the Work Center WIP Locations page.

Note. If you copy the Copy Resrc information along with the work center, the resources must already exist in the target business unit. If they do not exist, the system displays an error message and does not copy the work center.

Copying Work Center WIP Locations

Access the Copy Work Centers - Work Center WIP Locations page.

Work Centers											
Work Center WIP Locations											
WIP Locations											
Target BU	Target Work Center	Owned Area	Owned Lev 1	Owned Lev 2	Owned Lev 3	Owned Lev 4	Non-Owned Area	Non-Owned Lev 1	Non-Owned Lev 2	Non-Owned Lev 3	Non-Owned Lev 4
US008	BR-ASSY	SA	AIS1	ROW1	BIN1		NOWN	BIN			
US008	FI-ASSY	FA	AIS1	ROW1			NOWN	BIN			

Copy Work Centers - Work Center WIP Locations page

Owned Area and Non-Owned Area

Enter both the owned and the non-owned inventory storage areas. Specify all inventory locations if the target business unit is different from the source business unit.

The system displays the number of storage levels, such as Lev 1 (level 1), Lev 2, Lev 3, and Lev 4, defined for each storage area.

Save

The copy is completed when you click Save.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Structuring Inventory”

CHAPTER 13

Maintaining Tasks

This chapter provides an overview of tasks and discusses how to:

- Define and maintain tasks.
- Copy tasks.

Understanding Tasks

Tasks are jobs that can be performed within your manufacturing facility. When defining a task, you can set up default data, such as times and rates, that the system copies to an item's routing when you select the task for a given operation. Multiple items can reference the same task or you can set up unique tasks for each item.

You must define work centers before defining tasks. Prior to setting up tasks, you can optionally define resources (crews, machines, tools), and associate them to work centers.

To define conversion codes by task (as opposed to by work center) set the business unit rate maintenance to *By Task* in the Rate Maintenance/Defaulting group box on the MFG Business Unit Options page. You define conversion codes and their associated labor, machine, and overhead rates or costs within PeopleSoft Cost Management. You can assign a conversion code and up to four conversion overhead codes to the task.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, "Defining the Cost Foundation for Makeable Items"

Common Elements Used in This Chapter

Task Code

A unique identifier for the specific task.

Work Center

A unique identifier for the specific work center.



Click the Attachments button to launch the multimedia object attached to the task.

- You can enter a set of planning times and rates. Click the Planning to Costing Rate Copy button, and the system adds the same set of times and rates for costing.

- You can add a set of costing times and rates. Click the Costing to Planning Rate Copy button, and the system adds the same set of costing times and rates for planning.

Defining and Maintaining Tasks

To define and maintain tasks, use the Task Definition component (TASKS1).

You can create and maintain, by business unit, the master list of jobs or tasks that can be performed in the manufacturing process. You can also define the tasks' intensity and associated work centers, resources, operation times, conversion codes, attachments, and text information. You can associate multiple tasks with the same work center.

The use of tasks is optional, but it reduces duplication of maintenance within routings. If you perform the same task on multiple items, define the task only once and then reference that task on each item's routing. The system automatically copies the associated task information into the item's routing. At the routing level, you can change any attribute on the task that is specific to the item without affecting the task definition.

If each item requires unique processes or operations, you do not have to define task information. However, you do need to define the work center, resources, times, and conversion codes on the routing for each item.

When you add a new task or when you change any attribute in an existing task, the system optionally sends the Task Change workflow notification to the selected roles that you've defined, such as an engineering manager or cost accountant.

This section discusses how to:

1. Define task attributes.
2. Define task resources.
3. Define task operation times.
4. Define task conversion codes.
5. View task where-used data.

See Also

[Chapter 1, "Getting Started with PeopleSoft Manufacturing," page 3](#)

[Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 649](#)

Pages Used to Define and Maintain Tasks

Page Name	Object Name	Navigation	Usage
Definition	EN_TASKS	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Definition	Define task information such as the time required to complete the task, the resources used for the task, and the task intensity.

Page Name	Object Name	Navigation	Usage
Text	EN_TASK_TXT	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Text	Enter text about a task. Note. Use this page to enter up to 254 characters of text. Use the Attachments page for larger blocks of text.
Attachments	EN_TASK_ATT	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Attachments	Specify task attachments.
Resources (optional)	EN_TASK_RESOURCE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Resources	Define task resources.
Times	EN_TASK_TIME	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Times	Define task operation times and run rates.
Conversion Code (optional)	EN_TASK_CONCODE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Conversion Code	Define conversion codes associated with the labor and machine rates for a task.
Conversion Overhead Code (optional)	EN_TASK_CONOHCODE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Conversion Ovhd Code	Define task conversion overhead codes. You can select up to four overhead codes. The system displays data from the current production overhead rates.
Tasks Where Used - Used on Routings inquiry	EN_TASK_WHERE_RTG	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Review Tasks Where Used, Used on Routings	View all routings on which the task is specified.
Tasks Where Used - Used in Production inquiry	EN_TASK_WHERE_PRD	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Review Tasks Where Used, Used in Production	View all production that is associated with a specific task.
Tasks Where Used (report)	RUN_ENS1006B	Manufacturing Definitions, Tasks and Work Centers, Tasks Where Used Report	Lists the routings and production associated with either a selected task or a range of tasks within a particular business unit.

Defining Task Attributes

Access the Define Task - Definition page.

Define TaskResourcesTimesConversion CodeConversion Qvhd Codes

Definition TextAttachments

Unit:US008

Task Code:BRAKE

Description:Brake Assembly

Short Description:Brake Assy

*Work Center:BR-ASSYBrake Assembly Work Center

*Intensity:Longest

Subcontracting

☐ Subcontracted

Count Point Control

☐ Count Point

Planning Defaults

☐ Continuous Scheduling

☐ Ignore Capacity

Define Task - Definition page

Prior to defining your routings, you can define a master dictionary of tasks or jobs that can be performed at work centers.

After entering the business Unit and Task Code, associate the task with a Work Center. You can associate multiple tasks with the same work center, but tasks can only take place in one work center.

Intensity

Determines the basis of your scheduling. You can base the start and end date of the operation on the operation’s *Labor Time* (labor intensive) or *Mach Time* (machine intensive). Alternately, you can base the start and end date on *Longest* (longest of the two times) or on *Cumulative* (the sum of *Mach Time* and *Labor Time*).

Note.

If you define a task as subcontracted, the system automatically sets the Intensity to *Labor Time*.

Subcontracted

A task that’s performed by an outside subcontractor rather than done in-house. PeopleSoft Purchasing uses this when creating subcontracted purchase orders.

Count Point

Select if you want this task to be a count point operation. A count point indicates which operations on a routing you want to record completions and scrap. You can define count points on the Define Routings - Summary page.

Note.

Count points are optional and are used on only production IDs.

Planning Defaults

Select either or both of these options:

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- *Continuous Scheduling*: Select to complete the corresponding operation in a single run of continuous valid calendar time, with no down time.
- *Ignore Capacity*: Select to prevent PeopleSoft Supply Planning solvers from checking the corresponding operation for capacity violations.

Note. If you change a task with one of these pages, and the task is already associated with a routing operation, it does not change the routing information. Go to the Define Routings - Summary page and change the task.

See Also

Chapter 14, “Structuring Routings,” Defining Routing Operations, page 286

Chapter 23, “Completing Operations and Recording Scrap,” Recording End Item Completions Using Count Points, page 541

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Defining Task Resources

Access the Define Task - Resources page.

Define Task	Resources	Times	Conversion Code	Conversion Qvhd Codes			
Unit: US008 Task Code: BRAKE Brake Assembly							
Resource Defaults							
Crew Size: 1.00 Machine Resources: 1.00 Work Center: BR-ASSY							
Resources Used on Tasks							
Customize Find View All First 1-3 of 3 Last							
*Resource Type	Crew/Machine/Tool	Description	Status	Qty Used	Priority		
Primary Crew	ASSY03	Assembly Crew 3	Available		10	+	-
Alt Crew	ASSY01	Assembly Crew 1	Available		10	+	-
Primary Machir	BRAKE01	Brake Assembly Equipment 1	Available		10	+	-

Define Tasks - Resources page

Resource Defaults and Resources Used on Tasks

The system copies the Resource Defaults, as well as the Resources Used on Tasks information associated with the Work Center into the task information.

Resource Type and Crew/Machine/Tool

Edit resources (crews, machines and tools) by selecting a resource type and the specific crew, machine, and tool, provided that you have already associated the resource with the task's work center. For example, on the Work Center pages, you can specify primary and alternate machines on the work center. On the Define Task - Resources page, you can change those selections for this particular task.

Qty Used (quantity used) When you select *Primary* or *Alternate* tool as a resource type, the quantity used field becomes available for entry. Enter the tool quantity required to perform the task. This field is for informational purposes only.

Priority You can manually specify a priority for the task resource. The priority is an integer ranging from 1 to 999. The primary resource for tool, crew, and machine automatically changes to a priority of 10. Other resources of like type automatically change to a priority of 20.

Using the priority factor, choose between a crew and a machine, irrespective of their resource type. The priority appears by default onto the routing.

Note. You can have only one *Primary Crew* and one *Primary Machine* associated with the task. You can, however, have unlimited *Primary Tools* and *Alternate Crews, Machines* and *Tools*.

Note. You cannot associate crew and machine resources with subcontracted tasks.

Defining Task Operation Times

Access the Define Task - Times page.

Define Task - Times page

*Type	Op Time	Time Unit	Op Rate	Rate Unit	Inc. Setup		
Planning Labor Run	10.00	Minutes			☐	+	-
Planning Machine Run	10.00	Minutes			☐	+	-
Costing Labor Run	10.00	Minutes			☐	+	-
Costing Machine Run	10.00	Minutes			☐	+	-

Define Task - Times page

Task times are divided into labor and machine setup, run, fixed run, and post production. Additionally, you can have separate sets of times and run rates for planning and costing purposes. You can define intransit and queue time for planning purposes only. When defining time and run rates, define only the types that apply to the task.

Setting Schedule Options

Simultaneous Setup and Queue Select if setup for an operation can occur during the defined queue period. If this check box is selected, the system considers the longer of the two times when determining the lead time of an operation. When

you associate a task to a routing operation, this option is not valid if the task is the first operation on the routing.



The function of the Planning to Costing Rate Copy and the Costing to Planning Rate Copy buttons depends on existing planning or costing values on the page:

Note. If you are using PeopleSoft Supply Planning, you cannot select the Simultaneous Setup and Queue option.

Setting Operation Times and Rates

In the Operation Times group box, define the manufacturing times or rates:

Setup	The amount of time required to prepare an item, machine, or work center for production. This might involve calibration of a machine or running samples prior to the start of actual production. Express setup time in minutes, hours, or days. When the time is expressed in days, the system uses the average daily hours for the work center assigned to the task, to determine the number of operational hours in a day. When determining an operation's lead time, the scheduling function considers the setup time and does not factor in the number of units that must be processed. You can optionally specify that setup can be done during a work center's queue time or that operation setup can take place anytime after the start of production, except at the first operation.
Run	The amount of time necessary to process one unit, with the rate expressed in minutes, hours, or days. Or, alternatively, the number of units that can be processed in one time period, with the rate expressed in units per minute, units per hour, or units per day. When determining the lead time of an operation, the scheduling function calculates the total run time by factoring in the number of units to be produced.
Fixed Run	The amount of time necessary to complete the task, regardless of the number of units processed. For example, if it takes 24 hours to burn in a board, and the process must run for 24 hours if it's burning in 1 board or 10 boards, you can express this time as fixed run. Fixed run time is added to the total lead time of the operation. You can express it in minutes, hours, or days.
Post Production	The amount of time required to clean up, flush, or break down a machine, a work center or an area, once production has been completed. The system does not include post-production time in the operation lead time calculation because it is assumed this occurs when the units have moved on to the next operation. The system considers it in the item's cost. You can express post-production time in minutes, hours, or days.
Queue	Used in operation scheduling, this is the amount of time that units must wait at an operation before setup or processing can begin. You cannot define queue time for the first operation. For subsequent operations, however, you can define a queue time and whether or not setup can occur during the queue time. You can express queue time in minutes, hours, or days. The system does not include queue time in the operation's cost nor is it considered in PeopleSoft Supply Planning.

Intransit

Used in operation scheduling, this is the amount of time required to transport completed units from one operation to the next. Express intransit time in minutes, hours, or days. Intransit time is not included in the operation's cost nor is it considered in PeopleSoft Supply Planning.

When setting up the task times and rates, you can designate a set of times and rates for planning purposes and a set of times and rates for costing purposes. You do not need to include all the planning times for scheduling the operation or task, nor do you need to include all the costing times in the item's cost. Simply select the time types that are appropriate for the task. The system displays this data on the Routing Operations - Times page when you select the Task Code that you want to associate with the operation sequence.

Note. If you define a task as subcontracted, you can only maintain queue, intransit, and labor times.

You can make changes to the task times on an item-by-item basis on the Routing Operations - Times page without affecting the task master data. Conversely, if you change task information on the Task Times page after the task has been assigned to a routing, the item's routing information is not automatically changed.

Op Time (operation time)
and **Op Rate** (operation rate)

After selecting the operation Type, enter an operation time or operation rate.

Time/Rate Unit

If you enter an operation time, then the values are:

- *Days*
- *Hours*
- *Minutes*

For example, if you enter 5 in the Op Time field and *Days* in the Time/Rate Unit field, one unit would be completed every five days for the operation. Express setup, fixed run, post production, queue, and intransit in terms of operation times. You can define run in terms of operation time or a run rate.

If you enter an operation rate, then the values are:

- *Units/Day*
- *Units/Hour*
- *Units/Minute*

For example, suppose that you enter 3 in the Op Rate field and *Units/Day* in the Time/Rate Unit field, three units are completed every day for the operation. Use only operation rates to define run times.

Note. If a task is already linked to a routing, and you change any times and rates for the task with this page, the system makes no update to the routing data. If you want the data to be identical, make the change using the Routing Time page.

Including Setup

You can only select Inc. Setup (include setup in your operation lead time calculation) for the *Planning Labor Setup* and *Planning Machine Setup* operation types. In all other cases, the Inc. Setup check box is cleared and is unavailable for selection. If you do not select include setup, setup can begin prior to any production units arriving at the work center. The system assumes that setup can occur at any time after the start of production and does not include it as part of the item's lead time, except at the first operation. If you elect to include setup, the set up time is factored into the task or operation's lead time. The system always considers setup in the lead time calculation of the first operation, if setup is specified, regardless of the check box setting.

PeopleSoft Supply Planning Considerations

If you are using PeopleSoft Supply Planning, be aware that:

- If, in the item planning attributes, you've elected to maintain rates based on routings and resources as opposed to a lead time, then you must define labor or machine planning times (such as setup, run, or fixed run).

Do this so PeopleSoft Supply Planning can schedule operations and determine work center or resource capacity.

- PeopleSoft Supply Planning does not consider labor or machine post-production time as a requirement on the work center or the work centers resources.
- PeopleSoft Supply Planning does not consider queue and intransit times, even if you have specified them for the task.

Costing Considerations

In order to calculate costs for a given item, operation, and time type, you must have a corresponding costing rate type defined for a given cost version. For example, if you have a costing fixed run time of 5 hours defined on the task here, you should define a fixed run conversion rate (for example 100/hour USD) on the Costing Conversion Rates page.

If you intend to cost the operation using a fixed amount per unit, as opposed to a rate per hour, you must include a corresponding costing operation time Type. The costing operation time can represent the amount of time to complete the task, and the system uses it to calculate earned hours. However, the system uses the amount per unit in calculating the cost, regardless of the time specified. If you do not specify a costing time, the system does not include the per unit cost, even if there's a rate defined for the code assigned to the task.

Defining Task Conversion Codes

Access the Define Task - Conversion Code page.

Conversion costs are optional, but you define them so the system can calculate labor, machine, and overhead costs that are associated with manufactured items during cost roll-ups. The system uses these costs within PeopleSoft Manufacturing to calculate earned labor, machine, and overhead costs that are added to work in process inventory value when operation or assembly completions are recorded.

After you enter the task's conversion code, the system displays the Conversion Rate Type as well as labor and machine data from the current production rates.

The rates that appear are from the frozen conversion rates and costs updated during the last cost update and revaluation.

If your labor or machine rate is in cost per unit, and you want to include the cost in the cost roll-up calculation, select a corresponding costing rate type. For example, suppose that *Labor Run Rate* is .50 per unit, the task, or ultimately the routing, must have an entry for costing labor run time in order for the .50 to be included in the operation's cost.

See Also

[Chapter 12, "Defining Work Centers," page 251](#)

Viewing Task Where-Used Data

Access the Review Task Where Used component.

Routing Code

On the routing inquiry, the routing code indicates whether this routing is the primary (routing code 1) or alternate (routing codes 2-99) routing for the routing type.

Production Area

On the production inquiry, the system displays all production on which the task is performed. It segregates the production information by those items in a production area using production IDs and those items that are managed by production schedules.

Production ID

In the case of production ID, it displays the production IDs that have an operation that uses the task. For all other production, the system displays the item and the production area in which it is produced. In both cases, it displays the Op Seq (operation sequence), along with the operation's start time and date and due date and time.

See Also

[Chapter 12, "Defining Work Centers," page 251](#)

Copying Tasks

This section discusses how to copy tasks and associated attributes.

Page Used to Copy Tasks

Page Name	Object Name	Navigation	Usage
Copy Tasks	EN_TASK_COPY	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Copy Tasks, Copy Tasks	Copy a range of tasks, including associated times, text, and resources. If another business unit's tasks have similar attributes, you can copy data from one business unit to another and then change the information for the specific business unit.

Copy Tasks and Associated Attributes

Access the Copy Tasks page.

Copy Tasks

*Unit: US008

Search

From Task Code: BRAKE

Brake Assembly

*To Task Code: WHEEL

Wheel Assembly

Target Defaults

Default BU: US008

☒ Copy Resrc
 ☒ Copy Att
 ☐ Overwrite Task

Default Task: Source Task

☒ Copy Text
 ☒ Copy Times

Copy Attributes

Customize | Find | View All |

First 1-3 of 14 Last

Copy Task	Task Code	Description	Copy Times	Copy Resrc	Copy Text	Copy Att	Work Center	Target BU	Target Task	O/W
☒	BRAKE	Brake Assembly	☒	☒	☒	☒	BR-ASSY	US008	BRAKE	☐
☒	FINAL	Final Assembly	☒	☒	☒	☒	FI-ASSY	US008	FINAL	☐
☒	FORK	Add Fork	☒	☒	☒	☒	FI-ASSY	US008	FORK	☐

Copy Tasks page

You can copy a single Task or a range of tasks. Once you're entered the source information, click the Search button to display the task information.

Unit	Select the business Unit from which the tasks will be copied.
From Task Code and To Task Code	Select the (alphanumeric) range of tasks codes for which you want data copied.
Search	Click to populate the fields in the lower half of the page.
Default BU (default business unit)	The system displays the source business unit as the target business unit. Use this option if you are copying tasks within a business unit. Otherwise, specify the business unit to which the system copies the source information.
Default Task	Values are: • <i>Source Task</i>: The system displays the source task codes in the Target Task field in the lower-right part of the page. • <i>Leave Blank</i>: The Target Task field is blank. You can enter a different task code in this field. If you are copying tasks within a business Unit, select this option and enter the new task codes.
Copy Times, Resources, Text, and Attachments	You can copy the times, resources, text, and attachments associated with the source task to the target task. If you select Copy Resrc (copy resources), the system copies all of the resources in the source work center to the target work center, along with the resource priorities. You can change all of these selections on an individual basis on the detail part of the screen, including clearing the Copy Task check box,

if you decide not to copy the individual task after all. You can also change the Target BU (target business unit).

O/W (overwrite)

Select to make the default overwrite a target task with the information from the source task.

Task Code

If you select *Leave Blank* as the Default Task in the page header, enter the task code for the Target BU. If the Target Task already exists in the target business unit, and you select the O/W (overwrite) check box, the system deletes the information from the target task and replaces it with the source task data.

Note. If you copy resource information along with the task, the resources must already exist in the target business unit. If they do not exist, the system displays an error message and does not copy the task.

Save

When you click this button, the copy is complete.

CHAPTER 14

Structuring Routings

This chapter provides an overview of structuring routings and discusses how to:

- Maintain routings.
- Define master routings.
- Copy routings.
- Delete routings.
- View manufacturing routing comparisons.

Understanding Routings

You can create and maintain routings by using PeopleSoft Manufacturing. Routings include defining the routing code, operations, scheduling options, routing times, conversion costs, routing text, attachments, and the associated tasks, count points, work centers, and resources. You can specify a routing by business unit for any manufactured or purchased item.

When you add a new routing, or when you change any attribute in an existing routing, the system optionally sends a workflow notification to the selected roles defined by you—such as engineering manager or cost accountant.

You can also maintain routings for consigned items that you manufacture.

If you have enabled PeopleSoft Workflow, when a change is made to a routing, the system uses the Routing Change workflow to notify the manufacturing engineer (or other defined role) that a change has been made to a routing.

See Also

[Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649](#)

Understanding Yield by Operation in PeopleSoft Manufacturing

In many manufacturing processes, parent items (subassemblies, primary items or final assemblies) are lost during manufacturing. This loss manifests itself as assembly scrap, which can be due to breakage, poor quality, or non-conformance to specifications. Operation yield allows you to specify the quantity of goods expected to make it through the process. The expected lost can then be incorporated into the cost of the usable end items. Additionally, planning can take into account process yield and increment the demand by the expected loss so that demand will still be met once the manufacturing process has been completed. This function will enable you to specify a yield percentage on the routing operation step and will calculate the additional resources necessary to meet the scheduled quantity with the anticipated yield loss.

The system calculates the quantities required at the beginning of each operation sequence based on the yield percentage. When you create new production, you can enter either the beginning or ending quantities and the system will calculate the other quantity automatically.

Determining Order Quantities Using PeopleSoft Supply Planning

When using yield by operation and to ensure that the demand quantity is met, PeopleSoft Supply Planning recommends an inflated production quantity. This allows the ending production quantity to fulfill the demand should a standard yield loss occur.

Determining Operation Yield Percentages

You can specify a yield percentage at each routing operation using the Define Routings - Summary page.

Note. You do not have to use yield by operation. If you do not anticipate any yield loss during the production phase, you'll accept the default yield percentage value of 100% yield (or accept the default values) at all operation sequences.

See Also

[Chapter 18, "Maintaining Production Orders and Production Schedules," page 371](#)

[Chapter 14, "Structuring Routings," Defining Routing Operations, page 286](#)

Prerequisites

Prior to creating and maintaining routings you must, *at a minimum*:

- Define work centers where jobs or tasks will be performed.
- Define your conversion codes, if you want to calculate conversion costs.
- Define your conversion rates (labor, machine, and overhead rates or costs), if you want to calculate conversion costs.

When defining routings, you have several options regarding information that you can associate with a routing. These steps are optional:

1. Define your resources. Resources can be crews (people), machines, or tools. You can associate resources with a work center. If you are scheduling using PeopleSoft Supply Planning, you must define at least one crew or machine for each operation.
2. Define the master list of tasks to be performed in the manufacturing process. Tasks are useful if the same task is performed when manufacturing several items. You need to define the processing information only once on the task and then assign the task to the routings of those items.
3. You can also define any optional count points. Count points are an automated way to predefine where in the item's routing you want to record completions and scrap costs. If an operation is designated as a count point, assembly completions must be recorded at that operation. Material will only be consumed, and labor and overhead will only be earned, back to the previous count point.

Note. Count points can be used only on production IDs.

See Also

Chapter 12, "Defining Work Centers," page 251

PeopleSoft Managing Costs 8.8 PeopleBook, "Defining the Cost Foundation for Makeable Items"

Chapter 23, "Completing Operations and Recording Scrap," Recording End Item Completions Using Count Points, page 541

Common Elements Used in This Chapter

Routing Type

Select the type of routing. The options are:

- *Production*: The default routing type. Production routings are used for standard manufacturing processes.
- *Rework*: Create rework routings when you have a standard rework process. Rework routings list the routing steps that are commonly used for reworking an assembly.
- *Teardown*: Use for breaking down an assembly into its component parts and returning the components back to inventory. Teardown routings can differ from the production routing, but can use any of the existing tasks or work centers defined for production. Teardown outputs can be produced at any operation. Operations that produce teardown outputs cannot be subcontracted.

Note. Rework and teardown routings are used with production IDs only.

Cumulative Yield

This display-only field indicates the percentage of beginning quantity for the manufactured end item that is expected at the end of the production process as defined on the item's routing.

The cumulative yield is the compounded yield across the entire routing. This yield will be applied to determine order quantities,

Op Seq (operation sequence) Sequences operations on a routing. It is advisable to increment operation sequence numbers by a set amount (5) or (10) to enable insertion of additional operations at a later date.

Maintaining Routings

To create and maintain routings, use the Routing Definition component (EN_ROUTING).

This section discusses how to:

- Define routing operations.
- Define routing header information.
- Specify routing header attachments.
- Define routing resources.
- Set routing scheduling options.
- Define routing operation times and rates.
- Associate conversion cost codes with an operation.
- Specify routing operation attachments.

Pages Used to Maintain Routings

Page Name	Object Name	Navigation	Usage
Define Routings - Summary	EN_RTG_SUMMARY	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Summary	Assign item operations and attach tasks and work centers to a routing.
Define Routings - Header: Description	EN_RTG_HEADER	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Header, Description	Define header information such as the routing type and code.
Define Routings - Header: Documents	EN_RTG_HEADER_DC	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Header, Documents	Associate, access, and manage pertinent routing header documents in the embedded document management system. Note. You must have PeopleSoft Engineering installed to access this page.
Define Routings - Header: Attachments	EN_RTG_HEADER_ATT	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Header, Attachments	Attach files to the routing header information.

Page Name	Object Name	Navigation	Usage
Define Routings - Operations: Resources	EN_RTG_RESOURCE	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Operations, Resources	Define routing resources.
Define Routings - Operations: Scheduling	EN_RTG_SCHED	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Operations, Scheduling	Select operation scheduling options for routings.
Define Routings - Operations: Times	EN_RTG_TIME	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Operations, Times	Define routing operation times and rates for an operation.
Define Routings - Operations: Conv Cost Codes (conversion cost codes)	EN_RTG_CONCOST	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Operations, Conv Cost Codes	Associate routing conversion cost codes with an operation. Conversion rates and costs are associated with each code. The system uses these rates and costs to determine the labor, machine, and overhead cost of the operation.
Define Routings - Operations: Text	EN_RTG_OP_TXT	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Operations, Text	Attach text to an operation.
Define Routings - Operations: Documents	EN_RTG_OP_DC	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Operations, Documents	Associate, access, and manage pertinent routing operation documents in the embedded document management system. Note. You must have PeopleSoft Engineering installed to access this page.
Define Routings - Operations: Attachments	EN_RTG_OP_ATT	Manufacturing Definitions, Resources and Routings, Routings, Define Routings, Operations, Attachments	Specify routing operation attachments.
Routing Report	RUN_ENS1001	Manufacturing Definitions, Resources and Routings, Routings, Routing Report	Lists the routing information for manufacturing or engineering routings.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Setting Up Document Management Options

PeopleSoft Engineering 8.8 PeopleBook, “Managing Documents”

PeopleSoft Engineering 8.8 PeopleBook, “PeopleSoft Engineering Reports,” ENS1001 - Routing Report

Defining Routing Operations

Access the Define Routings - Summary page.

Summary | Header | Operations

Unit: US008
Item ID: MT2000 Std UOM: EA Source: Make
Professional Road Bike, Womans
Routing Code: 1 Routing State: Manufacturing Routing Type: Production Cum Yield %: 100.0000

Summary

Customize | Find | View All | First 1-5 of 5 Last

Operation List

*Op Seq	Task Code	Description	Sub	Count Point	*Work Center	Description	Yield %		
10	FORK	Add Fork	☐	☐	FI-ASSY	Final Assembly Work Center	100.000	+	-
20	FINAL	Final Assembly	☐	☐	FI-ASSY	Final Assembly Work Center	100.000	+	-
30	INSP	In Process Inspection	☐	☐	INSP	In Process Inspection	100.000	+	-
40	PAINT	Prime and Paint	☐	☐	PAINT01	Painting Work Center 1	100.000	+	-
50	INSP	In Process Inspection	☐	☐	INSP	In Process Inspection	100.000	+	-

Define Routings - Summary page

The operation sequences defined here correspond to the operation sequences you specified for components on the item's BOM. If you have not assigned operation sequences to the item's BOM, and you want to issue a component to the operation's WIP location, return to the BOM Maintenance component after you have added the item's routing.

Task Code (optional)

Enter this code to copy to the operation all related task and resource data, including whether the task is subcontracted, the work center, queue, setup, run, and post-production time information. If you have not predefined tasks, examine all succeeding pages and links to ensure that you set up the correct data for the designated item operation.

If you do not enter a task code, you need to manually enter extensive task data, including work center, routing time, resource, scheduling options, text attachments, and conversion rate code data on the subsequent pages.

Note. If you change the task code, the system deletes the old task information and copies the associated new task information into the item's routing. After you specify the task on the routing, this page does not reflect changes you make to the task in the Define Tasks component.

Sub (subcontracted)

This check box is selected if the task is a subcontracted operation.

You can change whether the task is subcontracted on this routing without affecting the default task information.

Work Center

If you enter a task code, the page displays the work center associated with the task.

If you haven't entered a task, you must enter a valid work center for the operation.

You can change the work center for this task on this routing without affecting the default task information. If you change the work center, the system automatically deletes the resources defined for the old work center and then adds the resources associated with the new work center. Also, if you are maintaining conversion costs by work center, the system adds the new conversion rates and deletes the old rates.

Note. Changing either task information or the work center after the item's cost has been calculated and updated in PeopleSoft Cost Management can result in process change variances for the item on any production subsequent to the change. These variances continue until the item's cost is recalculated and updated.

Yield %

Indicates the percentage of manufacturing items expected at the end of the operation sequence. The default value comes from the routing; you can change the value here.

Count Point (optional)

Select this check box to define an operation step as an operation count point. Count points can be used only on production IDs. You can predefine the count point operations by selecting the Count Point check box on the Define Task, Define Routings, and the Operation List Maintenance pages.

By default, this check box shows the count point setting from the Task Definition page.

Important! If you are using count points, the last operation step and any subcontracted operations must be defined as count points.

See Also

Chapter 1, "Getting Started with PeopleSoft Manufacturing," page 3

Defining Routing Header Information

Access the Define Routings - Header: Description page.

Summary		Header		Operations	
Description		Documents		Attachments	
Unit:	US008				
Item ID:	MT2000	Std UOM:	EA	Source:	Make
Professional Road Bike, Womans					
Routing Code:	1	Routing State:	Manufacturing	Routing Type:	Production
				Cum Yield %:	100.0000
Description:	Pro Road Bike, Wmn				
Short Desc:	Pro Road				
Copy Routing to Production	☒	Copy Routing to Planning	☒		
Priority:	1				
Text:					

Define Routings - Header: Description page

Unit, Item ID, Routing Type, and Routing Code

Enter information about a routing to add or maintain the routing for an owned item.

The system reserves a routing code of 1 for an item's primary production routing and uses it as the default routing for planning and costing (in PeopleSoft Supply Planning, PeopleSoft Cost Management, and PeopleSoft Manufacturing including production conversion cost calculations). You can specify up to 98 alternate routings for production, rework, or teardown routing types by entering additional routing codes (greater than 1) for the same routing type.

Note. You can add routings only for assembly items that are both owned and approved. Also, you can maintain routings only for those items whose business unit item attributes Used in Manufacturing is set to Yes.

Although you can add a routing for both manufactured and purchased items, you cannot add a routing for floor stock, planning, expensed, or configured items. If you add a routing for an item that references another item for its routing information, you receive a warning message. The item's own routing is never considered unless you change its reference routing information on the Define Business Unit Item - Manufacturing page.

Note. When adding a routing for an item with an item status of Hold or Discontinue, you receive a warning message. Similarly, when updating a routing for an item with an item status of Hold or Discontinue, you receive a warning message at save time. However, these warning messages do not prevent you from performing the action.

Routing Code

Enter a value to give the routing a unique numeric identifier.

Copy Routing to Production

Select this check box to copy the routing to operation lists for production IDs or production schedules. This enables you to track operation details and record completions at specific operations.

If you choose not to copy the routing to production, the system still uses the routing to calculate costs and calculate planning start/end order and schedule dates. If a rework routing is specified, the check box is automatically selected and is unavailable for selection.

Copy Routing to Planning

If you use PeopleSoft Supply Planning, select this check box to schedule at the operation level while optimizing resources. This check box is unavailable for rework and teardown routings.

However, if a rework or teardown routing has been copied to production for a specific production ID, that routing becomes the operation list used as the production option for the production ID.

Priority

If you use PeopleSoft Supply Planning, enter a routing priority to specify the order in which PeopleSoft Supply Planning uses alternate routings when planning production. The lower the priority number, the higher the priority.

Rework and teardown routings have no priority numbers.

MR (master routing) button

If the item's routing is a master (or reference) routing currently used by another item, an MR button appears on all the pages in this component. If you click this button, the system displays the Master Routing Where Used inquiry page. Use that inquiry to determine whether the changes made to a routing are applicable to all items for which it's a reference routing.

Note. You receive a warning if you modify an item's routing that is used by another item.

Engineering Considerations**ECO**

If you are using PeopleSoft Engineering and there are outstanding engineering change orders (ECOs) pending for the item—and you have selected the ECO Pending Alert check box on the ECO Item Status page, the system displays the ECO button next to the assembly Item ID field in this entire component. Click the ECO button to see information about pending ECOs associated with the item.

See Also

PeopleSoft Engineering 8.8 PeopleBook, “Structuring Engineering Routings,” Defining Master Routings
[Chapter 8, “Maintaining Bills of Material,” Maintaining Revisions, page 155](#)

Specifying Routing Header Attachments

Access the Define Routings - Header: Attachments page.

File Ext (file extension)

Select the type of media you want to attach.

Note. You must set up file extensions in advance on the File Locations page.

Document ID

Enter the file name.



Click the Attachments button to launch the multimedia object attached to the routing header.

See Also

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, “Defining Procurement Options,” Defining File Locations

Defining Routing Resources

Access the Define Routings - Operations: Resources page.

The screenshot displays the 'Define Routings - Operations: Resources' page. At the top, there are tabs for Summary, Header, and Operations. Below these are links for Resources, Scheduling, Times, Conv Cost Codes, Text, Documents, and Attachments. The main section contains routing header information: Unit (US008), Item ID (MT2000), Std UOM (EA), Source (Make), and a description (Professional Road Bike, Womans). Routing details include Routing Code (1), Routing State (Manufacturing), Routing Type (Production), and Cum Yield % (100.0000). The 'Operations' section has a sub-header with 'Find | View All' and 'First 1 of 5 Last'. It includes fields for *Op Seq (10), Task Code (FORK), *Work Center (FI-ASSY), Crew Size (1.00), Machine Resources (1.00), and Operation Yield % (100.0000). There are checkboxes for 'Continuous Scheduling' and 'Ignore Capacity'. Below this is a 'Resources' table with columns: *Resource Type, Crew/Machine/Tool, Description, Status, Qty Used, and Priority. The table lists three resources: Primary Crew (ASSY01), Alt Crew (ASSY02), and Primary Machine (FINAL01), all with a status of 'Available' and a priority of 10.

*Resource Type	Crew/Machine/Tool	Description	Status	Qty Used	Priority
Primary Crew	ASSY01	Assembly Crew 1	Available	0.0000	10
Alt Crew	ASSY02	Assembly Crew 2	Available	0.0000	10
Primary Machine	FINAL01	Final Assembly Equipment 1	Available	0.0000	10

Define Routings - Operations: Resources page

Operations

Op Seq, Task Code, and Work Center

These values appear by default from the Define Routings - Summary page, but they can be changed here.

Continuous Scheduling

Select this check box to indicate that the operation is continuous, cannot be stopped once started, and must be completed in one run.

Crew Size

Specifies the number of people at the work center. This value appears by default from the specified task or, if no task has been specified, from the work center.

If you change the crew size after the item's cost has been calculated and updated, the change results in process change variances for the item on

any production subsequent to the change. These variances continue until the item’s cost is recalculated and updated.

Machine Resources	Specifies the number of machines at the work center. This value appears by default from a specified task or, if no task has been specified, from the work center.
Ignore Capacity	Select this check box to indicate that Planning should not check a work center’s available capacity.

Note. Specifying resources on the routing operation is optional. You can delete existing resources if they are not appropriate for use with the manufactured item.

Resources

Resource Type	The resource must have been previously associated with the work center. Select to designate the type of resource. Options are: • <i>Primary Crew</i> • <i>Primary Machine</i> • <i>Primary Tool</i> • <i>Alternate Crew</i> • <i>Alternate Machine</i> • <i>Alternate Tool</i>

Note. You can have only one of each primary resource type. You can have unlimited alternate crews, machines, and tools.

Crew/Machine/Tool	Specify the code for the resource.
Qty Used (quantity used)	If the resource changed or added is a tool, enter the quantity used.
Priority (optional)	Manually specify a priority for the routing resource. The priority is an integer that ranges from 1 to 999. Using the priority factor, you can choose between a crew and a machine, regardless of the resource types.

Note. You cannot associate crew and machine resources with subcontracted tasks and operations, and you cannot associate resources with a Pending status to a production routing.

Setting Routing Schedule Options

Access the Define Routings - Operations: Scheduling page.

Production SelectionSummaryDetails

TimesOperation TextDocumentsAttachmentsResourcesConv Cost CodesScheduling

Unit:US008Released

Area:FINAL

Item ID:MT3000

Mountain Bike, Womans

Rtg Itm:MT3000

Prdn ID:PRD00234

Prdn Type:Production

Prdn Start Qty:5.0000

Prdn End Qty:5.0000

Routing Code:1

Source Cd:Make

Frozen:

UOM:EA

Expected Yield %:100.0000

Sch Method:Backward

Calculate Yield and Reschedule

Operation Detail

Find | View AllFirst1 of 5Last

*Op Seq:10

Task Code:FORKAdd Fork

*Work Center:FI-ASSYFinal Assy

Start Dt/Time:09/03/20039:23PM

Due Dt/Time:09/03/20039:38PM

Intensity:Longest

☐ Subcontracted

☐ Count Point

Operation Overlap

Op Overlap:No Overlap

Define Routings - Operations: Scheduling page

Scheduling

Op Seq, Task Code, and Work Center

These values appear by default from the Define Routings - Summary page, but they can be changed here.

Count Point

The check box is selected if the operation sequence is a count point. This display-only field appears by default from the Define Routings - Summary page.

Simultaneous Setup and Queue

Select this check box if setup can occur during the queue time of an operation. If selected, the system uses the longer of the two times when determining production start and end dates.

Note. You cannot select this check box for the first operation in a routing. You also cannot select it if you are using PeopleSoft Supply Planning.

Intensity

Use this field to determine the basis of your scheduling. Base the start and end date of the operation on labor time, machine time, or both. Select from these options:

- *Labor Time:* Use for labor intensive operations.
- *Machine Time:* Use for machine intensive operations.
- *Longest:* Use to base scheduling on the longer of the two times, evaluated for each time type within the operation.
- *Cumulative:* Use to base scheduling on the sum of the machine time and labor time.

Operation Overlap

Op Overlap (operation overlap)

Select to indicate whether a subsequent operation can begin prior to the completion of the prior operation. The options are:

- *No Overlap*: The subsequent operation does not overlap.
- *Percentage*: The subsequent operation overlaps by a percentage of elapsed run time completed. If you select this option, the Overlap % (overlap percentage) field appears.
- *Send Ahead*: The subsequent operation begins when a specified number of units are accumulated or finished. If you select this option, the Send Ahead field appears.

Overlap % (overlap percentage)

An overlap percentage of *100* means that the next operation can begin setup at the same time as the current operation's start of run. An overlap percentage of *5* means that 95 percent of the operation run must be completed before the next one can start.

Note. This value cannot be less than *0* or more than *100*, and there can be no overlap on the last routing operation sequence. Do not define operation overlap on an operation before a subcontracted operation because all assemblies and subassemblies must be sent out to the subcontractor as a batch. Because the vendor can send the item back in multiple batches, the system allows, on a subcontracted operation, operation overlap for send-ahead quantity and percentage.

Send Ahead

Specify the number of units that need to be accumulated or finished before they can be sent to the next operation and the next operation can begin. The quantity must be a positive number.

Important! If an operation has a fixed run rate assigned to it, the preceding operation cannot have a send-ahead quantity because fixed run operations require that the entire quantity is available at the beginning of the run. For example, operation 1 cannot have a send-ahead quantity assigned if operation 2 has a fixed run time.

Note. For multiple output batch items (where at least one co-product exists), the send-ahead quantity or percentage overlap is specified in terms of the BOM (bill of material) quantity, as defined on the primary item's BOM.

Note. To provide greater flexibility when defining BOMs, PeopleSoft Manufacturing does not require the Quantity field to follow the quantity precision rules defined for the item. A warning is issued if you define a decimal quantity value for an item whose quantity precision value is a whole number. For example, if one B0004 component is required to make two assembly A0001s, then when defining the BOM, the quantity per assembly (QPA) for B0004 would be 0.5. If PeopleSoft Manufacturing applied the rounding rules to the QPA, then it would round the QPA for B0004 to 1, and thereby inflate the production costs.

Defining Routing Operation Times and Rates

Access the Define Routings - Operations: Times page.

Summary **Header** **Operations**

[Resources](#) [Scheduling](#) [Times](#) [Conv Cost Codes](#) [Text](#) [Documents](#) [Attachments](#)

Unit: US008
Item ID: MT2000 **Std UOM:** EA **Source:** Make
 Professional Road Bike, Womans

Routing Code: 1 **Routing State:** Manufacturing **Routing Type:** Production **Cum Yield %:** 100.0000

Operations Find | View All First 1 of 5 Last

***Op Seq** 10 **Task Code** FORK Add Fork ***Work Center** FI-ASSY **Sub** ☐

Operation Times						
*Type	Op Time	Time Unit	Op Rate	Rate Unit	Inc. Setup	
Planning Labor Run	3.00	Minutes	0.00		☐	+ -
Planning Machine Run	3.00	Minutes	0.00		☐	+ -
Costing Labor Run	3.00	Minutes	0.00		☐	+ -
Costing Machine Run	3.00	Minutes	0.00		☐	+ -

Define Routings - Operations: Times page

Operations

You can insert a new operation in the same manner as on the Define Routings - Summary page.

Op Seq, Task Code, and Work Center

These values appear by default from the Define Routings - Summary page, but they can be changed here. You can change the task associated with any added or existing operation.

If you have already associated a task code with an operation, and you change the task, the system deletes the existing task information, including work center, resources, task times, and scheduling options and adds the new task information for the specific operation. Also, if you define your conversion rates at the task level, the system deletes the old task rates and adds the new rates.

If you change the work center, the system deletes the resources associated with the old work center and adds the new work center's resources.

If you maintain conversion rates at the work center level, the system deletes the old rates and adds the new rates.

Sub (subcontracted)

If the task is subcontracted, this check box is selected and the Vendor ID field appears. You can specify only labor times for a subcontracted operation.

Operation Times

In the Operation Times group box, the times or run rates appear by default from the task information, if defined. You can modify the manufacturing times or rates for fixed run, post production, run, and setup for the task. Changing the times and run rates here has no effect on the default master task information. If you did not specify a task, you can enter the times necessary to complete this operation.

If you are changing the operation costing times and run rates after the item’s cost has been calculated and updated, the change results in process change variances for the item on any production subsequent to the change. These variances continue until the item’s cost is recalculated and updated. If you are changing the operation from a regular task to a subcontracted one, you cannot select machine times or rates for the operation.

Type	Specify the type of operation time and then enter an operation time or rate.
Op Time (operation time)	Enter the operation time.
Time Unit	If you enter an operation time, this field gives the options <i>Days</i> , <i>Hours</i> , and <i>Minutes</i> . For example, if you enter 5 in the Op Time field and Days in the Time Unit field, one unit is completed every five days for the operation. The system determines the number of hours in a day by the work center’s average daily hours as defined in the Work Center Definition page.
Op Rate	Enter the operation rate. You can specify operation rates only for planning or costing run times.
Rate Unit	If you enter an operation time, you can select <i>Units/Day</i> , <i>Units/Hour</i> , or <i>Units/Minute</i> . For example, if you enter 3 in the Op Rate field and <i>Units/Day</i> in the Rate Unit field, three units are completed every day for the operation.
Inc Setup (include setup)	Select to include setup in your operation lead time calculation. You can only select this check box for <i>Planning Labor Setup</i> and <i>Planning Machine Setup</i> operation types. If you do not select include setup, setup can begin prior to any production units arriving at the work center. The system assumes that setup can occur at any time after the start of production and does not include it as part of the item’s lead time, except at the first operation. If you elect to include set up, the set up time is factored into the task or operation’s lead time. The system always considers setup in the lead time calculation of the first operation, if setup is specified, regardless of the check box setting.
	Click Planning to Costing Rate Copy button if you’ve entered or modified the planning times and want to copy the planning-related types to the costing rates.
	Click Costing Rate to Planning Copy button if you’ve entered or modified the costing times and want to copy the costing-related types to the planning rates.

Note. If you are defining routing times for a batch item (a multiple output item with at least one co-product), then both the routing times and rates for costing and planning must relate to the in-process batch item’s BOM quantity. The routing times and rates are not related to the individual outputs. For example, if the BOM quantity for Item ID 10001 is 1000, and the BOM’s primary output quantity for 10001 is 500—meaning for every batch of 1000 you anticipate getting 500—the routing times and rates must be defined in terms of the 1000 and not 500.

Note. You can change any production times or rates for the task for the specific item routing without affecting the master task information. If you make a change here, and you want to make the task data identical, you need to also make the change in the Task Time page. The reverse is also true. Once you have associated times or rates with an operation, changing the task's master data will not affect this data on this page.

The system allows only these times for subcontracted tasks and operations:

- Queue
- Intransit
- Planning and costing labor setup, run, fixed run and post production

You cannot specify machine times for subcontracted tasks and operations.

Costing Considerations

Here are some costing considerations when defining operation times and rates:

- To calculate costs for a given item, operation, or time type, you must have a corresponding costing rate type defined for a particular cost version.

For example, if you have a costing fixed run time of 5 hours defined on the task, you should also have defined within PeopleSoft Cost Management a fixed run conversion rate (for example, 100.00 per hour) associated with the cost version and conversion code combination.

- If you intend to cost the operation using a fixed amount per unit (as opposed to a rate per hour), you must include a corresponding costing operation time type.

The costing operation time can represent the amount of time to complete the task and the system uses it to calculate earned hours. However, the system uses the amount per unit in calculating the cost, regardless of the time specified. If you don't specify a costing time, the system won't include the per-unit cost even if there's a rate defined for the code assigned to the task.

PeopleSoft Supply Planning Considerations

If you are using PeopleSoft Supply Planning, you need to be aware that:

- If, in the item planning attributes, you elected to maintain rates based on routings and resources (as opposed to a lead time), you must define labor or machine planning times (setup, run, or fixed run) in order for PeopleSoft Supply Planning to schedule operations and determine work center or resource capacity.
- PeopleSoft Supply Planning uses labor or machine postproduction time as a requirement on the work center or the work centers resources.
- PeopleSoft Supply Planning uses queue and intransit times, if they are specified for the task.
- If you have indicated that setup isn't included for scheduling purposes (that is, setup can begin at any time after the start of production), the system does not use it for capacity planning purposes.

See Also

Chapter 13, "Maintaining Tasks," page 269

Associating Conversion Cost Codes With an Operation

Access the Define Routings - Operations: Conv Cost Codes page.

The screenshot displays the 'Define Routings - Operations: Conv Cost Codes' page. At the top, there are tabs for Summary, Header, and Operations. Below these are links for Resources, Scheduling, Times, Conv Cost Codes, Text, Documents, and Attachments. The main section shows routing details for Unit US008, Item ID MT2000 (Professional Road Bike, Womans). The Routing Code is 1, Routing State is Manufacturing, Routing Type is Production, and Cum Yield % is 100.0000. The 'Conversion Cost Codes' section is expanded, showing a table with columns for Op Seq, Task Code, Work Center, and Conversion Code. The table lists conversion codes 4402, 6501, 6505, and 6506, each associated with a specific work center (Assembler, Assembly, Administration, Support).

Define Routings - Operations: Conv Cost Codes page

Op Seq, Task Code, and Work Center

These values appear by default from the Define Routings - Summary page, but they can be changed here. If you maintain conversion rates at the work center level, the system displays the conversion codes that are associated with the operation's work center.

If you maintain conversion rates at the task level and entered a task code, the system displays the conversion codes that are associated with the operation's task.

Conversion Code

Select a value to change the labor, machine, or overhead cost for a specific operation on a routing.

To view the labor, machine, and overhead rates or costs assigned to the code, see the Conversion Code and Conversion Overhead Code pages for the task or work center.

Note. Changing conversion codes creates variances until the item cost is recalculated and updated.

First Conversion Ovhd Code (first conversion overhead code), Second Conversion Ovhd Code, Third Conversion Ovhd Code, and Fourth Conversion Ovhd Code

Select up to four conversion overhead codes in these fields. The codes are used to calculate the overhead costs associated with the operation.

Note. If you specify the labor or machine rate in cost per unit and you want to include the cost in the cost roll-up calculation, you must also define the corresponding costing rate type. For example, if Labor Run Rate is *0.50* per unit, the task (or the routing) needs an entry for costing labor run time so that the *0.50* is included in the operation’s cost.

Note. The rates displayed are the current rates used in production to calculate earned labor, machine and overhead costs. These costs are copied into a frozen production rate record during the production cost update and inventory revaluation process and are based on the rates associated with the cost type and version used to calculate the new production costs.

Specifying Routing Operation Attachments

Access the Define Routings - Operations: Attachments page.

Op Seq, Task Code, and Work Center These values appear by default from the Define Routings - Summary page, but they can be changed here. Specify the operation with which you want to associate the attachment.

File Ext (file extension) Select the type of media you want to attach.

Note. You must set up file extensions in advance on the File Locations Page.

Document ID Enter the file name.

See Also

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, “Defining Procurement Options,” Defining File Locations

Defining and Viewing Master Routings

This section provides an overview of master routings and discusses how to:

- Define master routings.
- View manufacturing master routings where-used information.

Understanding Master Routings

You can define master or reference routings in PeopleSoft Inventory on the Manufacturing page within the Define Business Unit Item pages. If many items have the same processing steps, you can create a master routing that many items can use as their individual routing.

You have four options:

- An item can have its own set of routings.
- You can directly link an item to the routings of another item.

- You can link the routings of a particular item to an inventory item group.

This option indicates that the item uses the set of routings assigned to its inventory item group.

Note. Before making this link, you need to define an item group and assign that item group to a reference routing item within PeopleSoft Inventory.

- You can link the routings of a particular item to an inventory item family.

This option indicates that the item uses the set of routings assigned to its inventory item family.

Note. Before making this link, you need to define an item family and assign that item family to a reference routing item within PeopleSoft Inventory.

Note. Cost roll-ups, PeopleSoft Supply Planning, and PeopleSoft Manufacturing always use the routing indicated—the item’s own routing, the referenced item’s routing, or the routing assigned to its group or family. Items use the reference routing item’s rework and teardown routings in addition to the production routing. Also, within PeopleSoft Manufacturing, you see the reference or master routing displayed everywhere a routing code is displayed.

Changing the reference item’s routing does not affect current production that has a production status of Firmed, Released, or In Process, because the routing has already been copied into the operation list. However, subsequent production of the listed items will be affected by the master routing item changes.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Item Control Values”

Pages Used to Define and View Master Routings

Page Name	Object Name	Navigation	Usage
Manufacturing - General	MFB_ATTRIB	Items, Define Items and Attributes, Define Business Unit Item, Manufacturing, General	Define a master routing for an item.
Master Routing Where Used inquiry	EN_RTG_MST_WH_USED	Manufacturing Definitions, Resources and Routings, Routings, Review Master Rtg Where Used, Master Routing Where Used	Display the items that reference an item as its reference routing. You can display master routing where-used information for an item.
Master Rtg Where Used Report	RUN_ENS1003	Manufacturing Definitions, Resources and Routings, Routings, Master Rtg Where Used Report, Master Rtg Where Used Report	Generate the Master Routing Where Used report.

Defining a Master Routing

Access the Define Business Unit Item: Manufacturing - General page.

General		Inventory		Substitutes		Manufacturing		Planning		Configuration		Custom	
General <u>WIP Replenishment</u>													
Unit: US008		Item ID: MT2000		Standard Unit of Measure: EA									
Professional Road Bike, Womans													
Production Area:				☐ Calc Comp Yield at Completion		Component Issue Method ☒ Issue ☐ Kit ☐ Replenish							
Source Code:		Make		☐ Phantom Item									
Average Order Qty:		10.0000											
Associated Primary BOM:		MT2000		BOM Usage ☒ Revision Control ☐ By Effectivity Date ☒ Auto Revision ☒ By Revision									
Master Routing Option ☒ Item ☐ Item Group ☐ Item Family Reference Routing Item: MT2000													
Production Option Control ☒ Use BOM/Routing Defaults BOM Code: ☐ Use Prdn Option Maintenance Routing Code: ☐ Valid Production Options only													

Define Business Unit Item: Manufacturing - General page

Master Routings Option

- Item** Select this option to link an item directly to the routing of the item you select in the Reference Routing Item field. The default is the item itself.
- Item Group** Select this option to link the routings of a reference routing Item to an item group. To use this option you must first define item group routings on the Group Rtg Assignment page.
- Item Family** Select this option to link the routings of a reference routing Item to an item family. To use this option you must first define item group routings on the Family Rtg Assignment page.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Item Control Values”

Viewing Manufacturing Master Routings Where-Used Information

Access the Master Routing Where Used page.

Master Routing Where Used

Business Unit:

US008

Master Routing Item:

SR1001 

Routing State:

Manufacturing

Omega 500 Touring Bike

Std UOM:

EA

☐ Lot Control

Source Cd:

Make

☒ Serial Control

Planner Code:

AWV

☒ Revision Control

Items

Customize | Find | 

First  1-6 of 6  Last

Item	Descr	Std UOM	Lot	Serial	Source Cd	Revision	Planner Cd
LT5010 	Custom Road Bicycle	EA	☒	☐	Make	☐	AWV
LT5011 	Custom Road Bicycle Wheel	EA	☒	☐	Make	☐	LK
SR1002 	Carrera 6000 Hi Performance Ro	EA	☐	☒	Make	☐	AWV
SR1003 	Mt. Whitney 3000 Mountain Bike	EA	☐	☒	Make	☐	AWV
SR1301 	Denali 500 Touring Bike	EA	☐	☒	Make	☐	AWV
SR3001 	Diablo 500 Touring Bike	EA	☐	☐	Make	☐	AWV

Master Routing Where Used inquiry page

Item and Desc (description) The page displays basic information about the item.



Click the Production for an Item button next to the Master Routing Item field to view all production that is using the referenced (master) routing.



Click the Production for an Item button next to the Item ID to access the Production Item List page to view item where-used production information for the *specific* item.

See Also

PeopleSoft Engineering 8.8 PeopleBook, “PeopleSoft Engineering Reports,” ENS1003
- Master Routing Where Used Report

Copying Routings

This section discusses how to:

- Copy routings.
- Copy routing details.

Pages Used to Copy Routings

Page Name	Object Name	Navigation	Usage
Copy Routing	EN_RTG_COPY	Manufacturing Definitions, Resources and Routings, Routings, Copy Routings, Copy Routings	Copy routing data from one item to another within a business unit or, optionally, across business units.
Copy Routing: Detail	EN_RTG_COPY_DET	Manufacturing Definitions, Resources and Routings, Routings, Copy Routings, Copy Routing Detail	Review the data that the system will copy.

Copying Routings

Access the Copy Routing page.

Copy Routing

Copy Routing Detail

Target Routing

Unit: US008
Item ID: MT3000 Mountain Bike, Womans
Std UOM: EA

Edit Rtg

☒ Copy Operation Times
☒ Copy Assembly Text
☒ Copy Operation Text
☒ Copy Operation Att

☒ Copy Operation Resources
☐ Copy Assembly Docs
☒ Copy Assembly Att
☐ Copy Operation Docs

View Source

View Target

Same as Except:

Apply

Operations

Customize | Find | View All | First 1-5 of 5 Last

Copy	Op Seq	Task Code	Description	Sub	Count Point	Work Center	Description	Yield %
☒	10	FORK	Add Fork	☐	☐	FI-ASSY	Final Assembly Work Center	100.0000
☒	20	FINAL	Final Assembly	☐	☐	FI-ASSY	Final Assembly Work Center	100.0000
☒	30	INSP	In Process Inspection	☐	☐	INSP	In Process Inspection	100.0000
☒	40	PAINT	Prime and Paint	☐	☐	PAINT01	Painting Work Center 1	100.0000
☒	50	INSP	In Process Inspection	☐	☐	INSP	In Process Inspection	100.0000

Copy Routing page

Source Routing

Routing Code

Select the code for the desired source business unit and item ID combination.

Routing Type

Select for the source routing. After you select a routing type for the source routing, the system uses the same routing type by default for the target routing.

Search

Click to display the routing information associated with source business unit and item.

Cumulative Yield

Displays the cumulative yield that will be copied if all operations are copied.

Target Routing

Routing Code

Select the code for the desired target business unit and item ID combination. You cannot specify as the target an item that has a source code of floor stock, expense, or planning. If you want to use one item's routing as the basis for the routing of another item with similar processing, enter the same business unit for both the source and the target.

Routing Type

The target routing type is the same as for the source.

Operations

Copy

Select to copy any specific row of data.

Sub (subcontracted)

If the task is subcontracted, this check box is selected.

Count Point

If the source routing or target routing contains an operation sequence that is a count point, this check box is selected.

Copying Routing Details

Access the Copy Routing Detail page.

Copy Routing

Copy Routing Detail

Target Routing

Unit: US008
Item ID: MT3000 Mountain Bike, Womans Std UOM: EA

Edit Rtg

☒ Copy Operation Times
☒ Copy Assembly Text
☒ Copy Operation Text
☒ Copy Operation Att
☒ Copy Operation Resources
☐ Copy Assembly Docs
☒ Copy Assembly Att
☐ Copy Operation Docs

View Source

View Target

Same as Except:

Apply

Operations

Customize | Find | View All | First 1-5 of 5 Last

Copy	Op Seq	Task Code	Description	Sub	Count Point	Work Center	Description	Yield %
☒	10	FORK	Add Fork	☐	☐	FI-ASSY	Final Assembly Work Center	100.0000
☒	20	FINAL	Final Assembly	☐	☐	FI-ASSY	Final Assembly Work Center	100.0000
☒	30	INSP	In Process Inspection	☐	☐	INSP	In Process Inspection	100.0000
☒	40	PAINT	Prime and Paint	☐	☐	PAINT01	Painting Work Center 1	100.0000
☒	50	INSP	In Process Inspection	☐	☐	INSP	In Process Inspection	100.0000

Copy Routing Detail page

You have the option to copy the associated routing operation times, resources, text, attachments, and documents, as well as assembly text, attachments, and documents. If you don't want to copy routing attributes, clear the attributes by unchecking the appropriate check boxes.

Note. You can copy documents only if you have selected identical item IDs for both the source routing and target routing.

Copy	Select which operations to copy or not copy by selecting or clearing the appropriate check boxes.
Same as Except	Use to select the operations to copy. The options are: • <i>Exclude All:</i> Use this option to clear all the check boxes. You can then select only the operations that you want to copy by selecting their Copy check boxes. • <i>Exclude Op Seq Range:</i> Use this option to exclude by ranges. When you select this option, the system displays the From and To Seq Nbr (sequence number) fields. Enter the range of operations that you want to exclude and then click the Apply button. • <i>Include All:</i> Use this option to select all the check boxes. You can then clear only the operations that you do not want to copy by clearing the appropriate Copy check boxes. • <i>Include Op Seq Range:</i> Use this option to include by ranges. When you select this option, the system displays the From and To Seq Nbr (sequence number) fields. Enter the range of operations that you want to include and then click the Apply button.
Copy Operation Resources	Copy all resources in the source work center to the target work center, along with the resource priorities.
View Source	Click to see the source item's routing and the operations selected to copy.
View Target	Click to see what the target item's routing will look like when it's copied.
Save	Click to complete the copying process. If the exact business unit, item ID, routing type, and routing code combination already exist as the target, the system prompts you to overwrite the existing routing. If you overwrite the routing, the system deletes the target routing and replaces it with the source routing. The Edit Routing button appears so that you may transfer to the Routing Maintenance pages to make changes on the copied routing.
Edit Routing	Click to edit the source item's routings with the Define Routings - Summary page.

Engineering Considerations - Transferring Routings

If you have PeopleSoft Engineering installed, you also have the option to transfer multiple routings at the same time from Engineering to Manufacturing or from Manufacturing to Engineering.

See Also

PeopleSoft Engineering 8.8 PeopleBook, "Processing ECRs and ECOs," Transferring BOMs and Routings

Deleting Routings

This section discusses how to delete routings.

Page Used to Delete Routings

Page Name	Object Name	Navigation	Usage
Delete Routings	EG_RTG_DELETE	Manufacturing Definitions, Resources and Routings, Routings, Delete Routings, Delete Routings	Delete routings for a range of items.

Deleting Routings

Access the Delete Routings page.

Delete Routings

*Unit:

US008

Search

From Item ID:

MT2000

Professional Road Bike, Womans

To Item ID:

MT3000

Mountain Bike, Womans

*Routing Type:

Production

Routing Code:

Routing State:

Manufacturing

Routings				
Customize Find View All 1-2 of 2 First Last				
Item	Description	Routing	Source Cd	Delete?
MT2000	Professional Road Bike, Womans	1	Make	☐
MT3000	Mountain Bike, Womans	1	Make	☐

Delete Routings page

Routing Type, Routing Code, From Item ID, To Item ID

Select the basic information, including the ID range, for the items whose routings you want to delete.

Delete?

Select for every item whose routing you want to delete.



Click the Select All button to select all the Delete? check boxes.



Click the Deselect All button to clear all the Delete? check boxes.

Note. You cannot delete an item's Routing Code if it's in use in a production area nor can you delete one if *Firm* or *Released* production IDs or production schedules exist.

Viewing Manufacturing Routing Comparisons

This section covers manufacturing routing comparisons and discusses how to:

- Compare manufacturing routings in general.
- Compare manufacturing routing header detail differences.
- Compare manufacturing routing operation detail differences.
- Compare manufacturing routing resource differences.
- Compare manufacturing routing operation time differences.

Common Elements Used in This Section

Differences

Displays the differences between the two routings. The possible values in this column are:

- *Added*: Indicates an element has been added to the target routing (RTG2) that does not appear on the baseline routing (RTG1).
- *Deleted*: Indicates an element appears on the baseline routing, but doesn't appear on the target routing.
- *Chg* (change): Indicates that the element exists on both routings, but there are differences in the operation attributes.
- *Chg RTG1*: Specifies the attributes of the baseline routing.
- *Chg RTG2*: Specifies the attributes of the target routing.

Pages Used to View Manufacturing Routing Comparisons

Page Name	Object Name	Navigation	Usage
Routing Comparison - RTG Selections	EG_RTG_INQ_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, RTG Selections	Display the comparison of two manufacturing routings or the same manufacturing item based on two different routing codes.
Routing Comparison - Header: Details	EG_RTG_HDR_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Header, Details	Display header details of the routing comparisons.
Routing Comparison - Header: Documents	EG_RTG_HDC_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Header, Documents	Display any header document information that is associated with selected routings. Note. You must have PeopleSoft Engineering installed to access this page.

Page Name	Object Name	Navigation	Usage
Routing Comparison - Header: Attachments	EG_RTG_HATT_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Header, Attachments	Display header attachment information for the two routings that you've compared.
Routing Comparison - Operations: Details	EG_RTG_OPS_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Operations, Details	Display the differences in operations for the two routings.
Routing Comparison - Operations: Resources	EG_RTG_RSRC_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Operations, Resources	Display differences in resources for the two manufacturing routings.
Routing Comparisons - Operations: Times	EG_RTG_TIME_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Operations, Times	Display operation time differences.
Routing Comparison - Operations: Documents	EG_RTG_OPDC_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparisons, Operations, Documents	Display the routing document differences. Note. You must have PeopleSoft Engineering installed to access this page.
Routing Comparison - Operations: Attachments	EG_RTG_OPAT_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Operations, Attachments	Display differences in operation attachments.
Routing Compare Report	RUN_ENS1002	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison Report, Routing Compare Report	Generate a hard-copy report that extensively compares an item's primary or alternate routings to another item's routing. Alternatively, you can select the primary or any alternate routing and compare it to any of the item's other routings.

See Also

PeopleSoft Engineering 8.8 PeopleBook, "PeopleSoft Engineering Reports,"
ENS1002 - Compare Routings Report

Comparing Manufacturing Routings

Access the Routing Comparison - RTG Selections (routing selections) page.

RTG Selections

Header

Operations

Unit:
*Routing Type:

Baseline Routing (RTG1)

Routing State:
Item ID: Professional Road Bike, Womans
*Routing Code:

Target Routing (RTG2)

Routing State:
Item ID: Mountain Bike, Womans
*Routing Code:

Routing Comparison - RTG Selections page

Baseline Routing (RTG1)

- Routing State** Appears by default as *Manufacturing* and is display-only.
- Item ID** Select the item ID of the baseline routing to use for the comparison.
- Routing Code** Select a routing code that is valid for the specified item ID.

Target Routing (RTG2)

- Item ID** Select the item ID of the target routing to use for the comparison.
- Routing Code** Select a routing code that is valid for the specified item ID.

Click the Compare Routings button to display the comparison of the two routings.

Comparing Manufacturing Routings Header Detail Differences

Access the Routing Comparisons - Header: Details page.

RTG Selections		Header		Operations	
Details Documents Attachments					
Unit: US008		Rtg Type: Production			
Baseline Routing (RTG1)			Manufacturing Routing (RTG2)		
Rtg State: Manufacturing			Rtg State: Manufacturing		
Item ID: MT2000 Professional Road Bike, Womans			Item ID: MT3000 Mountain Bike, Womans		
Routing Code: 1			Routing Code: 1		
Routing	Description / Short Descr	Copy to Prdn.	Copy to Planning	Text	
RTG1	Pro Road Bike, Wmn	☒	☒		
	Pro Road Priority 1				
RTG2	Mountain Bike, Womans	☒	☒		
	Mt Bike Wm Priority 1				

Routing Comparisons - Header: Details inquiry page

Routing, Description, Priority, Text, Copy to Prdn (copy to production), and **Copy to Planning**

These fields display the routing header data for both routings, including whether the routing is to be copied to production and planning.

See Also

Chapter 14, "Structuring Routings," Defining Routing Header Information, page 287

Comparing Operation Detail Differences

Access the Operations - Details page.

RTG Selections		Header		Operations					
Details		Resources		Times					
Documents		Attachments							
Unit: US008		Rtg Type: Production							
Baseline Routing (RTG1)									
Rtg State:		Manufacturing							
Item ID:		MT2000							
		Professional Road Bike, Womans							
Routing Code:		1							
Manufacturing Routing (RTG2)									
Rtg State:		Manufacturing							
Item ID:		MT3000							
		Mountain Bike, Womans							
Routing Code:		1							
Operation Details									
Customize Find First 1-2 of 2 Last									
Operations		Resources		Conversion/Overheads					
Vendor Details		Text							
Differences	Op Seq	Task Code	Description	Count Point	Sub	S/Q	Intensity	Send Ahead	Yield %
Chg RTG1	40	PAINT	Prime and Paint	☐	☐	☐	Longest		100.0000
Chg RTG2	40	SUB-1	Subcontracted Painting	☐	☒	☐	Labor Time		100.0000

Operations - Details page

This page displays the differences in the operation sequence and other related operation detail information.

Operations Tab

Select the Operations tab.

This page displays the differences including information such as task code, count point, whether it's subcontracted operation, any setup and que, intensity, operation yield percentage and any send ahead quantity.

Resources Tab

Select the Resources tab.

This page displays resource differences in work centers, crew size, and machines.

Conversion/Overheads Tab

Select the Conversion/Overheads tab.

This page displays conversion/overhead Differences, including information such as Conversion Code, Description, and overhead conversion codes (Overhead 1, Overhead 2, Overhead 3, Overhead 4) associated with the operations.

Comparing Operation Resource Differences

Access the Operations - Resources page.

RTG Selections

Header

Operations

[Details](#)
[Resources](#)
[Times](#)
[Documents](#)
[Attachments](#)

Unit: US008 Rtg Type: Production

Baseline Routing (RTG1)

Rtg State: Manufacturing
Item ID: MT2000
Professional Road Bike, Womans
Routing Code: 1

Manufacturing Routing (RTG2)

Rtg State: Manufacturing
Item ID: MT3000
Mountain Bike, Womans
Routing Code: 1

Operation Resources

Customize | Find |

First 1-3 of 3 Last

Differences	Op Seq	Resource Type	Crew/Machine/Tool	Description	Qty Used	Priority
Deltd CC	40	Primary Crew	PAINT01	Painting Crew 1		10
Deltd CC	40	Alt Crew	PAINT02	Painting Crew 2		10
Deltd MC	40	Primary Machine	PAINT01	Painting Equipment 1		10

Operations - Resources page

The page displays Differences in Op Seq (operation sequence), Resource Type, Crew/Machine/Tool, Description, Qty Used (quantity used), and Priority.

If there is a difference in resource priority between two routing codes for a single item, or between two items, it will appear on this page.

Comparing Operation Time Differences

Access the Operations - Times page.

RTG Selections

Header

Operations

[Details](#)
[Resources](#)
[Times](#)
[Documents](#)
[Attachments](#)

Unit: US008 Rtg Type: Production

Baseline Routing (RTG1)

Rtg State: Manufacturing
Item ID: MT2000
Professional Road Bike, Womans
Routing Code: 1

Manufacturing Routing (RTG2)

Rtg State: Manufacturing
Item ID: MT3000
Mountain Bike, Womans
Routing Code: 1

Operation Times

Customize | Find |

First 1-6 of 6 Last

Differences	Op Seq	Time / Resource Type	Op Time	Time Unit	Op Rate	Rate Unit	Inc. Setup
Deleted	40	Planning Labor Fixed Run	15.00	Minutes			☐
Added	40	Planning Labor Run	0.00		200.00	Units/Hour	☐
Deleted	40	Planning Machine Fixed Run	1.00	Hours			☐
Deleted	40	Costing Labor Fixed Run	15.00	Minutes			☐
Added	40	Costing Labor Run	0.00		200.00	Units/Hour	☐
Deleted	40	Costing Machine Fixed Run	1.00	Hours			☐

Operations - Times page

This page displays Differences in the Op Seq (operation sequence), Time/Resource Type, Op Time (operation time), Time Unit, Op Rate (operation rate), and Rate Unit, and whether the time is included in the setup.

CHAPTER 15

Defining Production Options

This chapter provides an overview of production options and discusses how to:

- Define the items that are to use production options.
- Create production options.
- Use the autocreate production options process.
- Copy production options.
- View component and output mix and production options.
- Use production options with other PeopleSoft applications.

Note. In the documentation, the term PeopleSoft Supply Planning refers to both PeopleSoft Supply Planning Multi-Site Material and Advanced Multi-Site Planner, unless stated otherwise.

Understanding Production Options

Some companies' products have either cyclical or seasonal variations in their method of producing an item. They need the ability to define different effective-dated BOM and routing combinations at different times of the year and at the same time, have planning recommend those combinations, based on production order due dates. For the discrete user, the main advantage in using this functionality is that you can link a BOM and routing code together, specify which BOM and routing combinations can be extracted to PeopleSoft Supply Planning, and use these predefined combinations in PeopleSoft Manufacturing. Optionally, you can also ensure that the production ID maintenance users select only valid combinations.

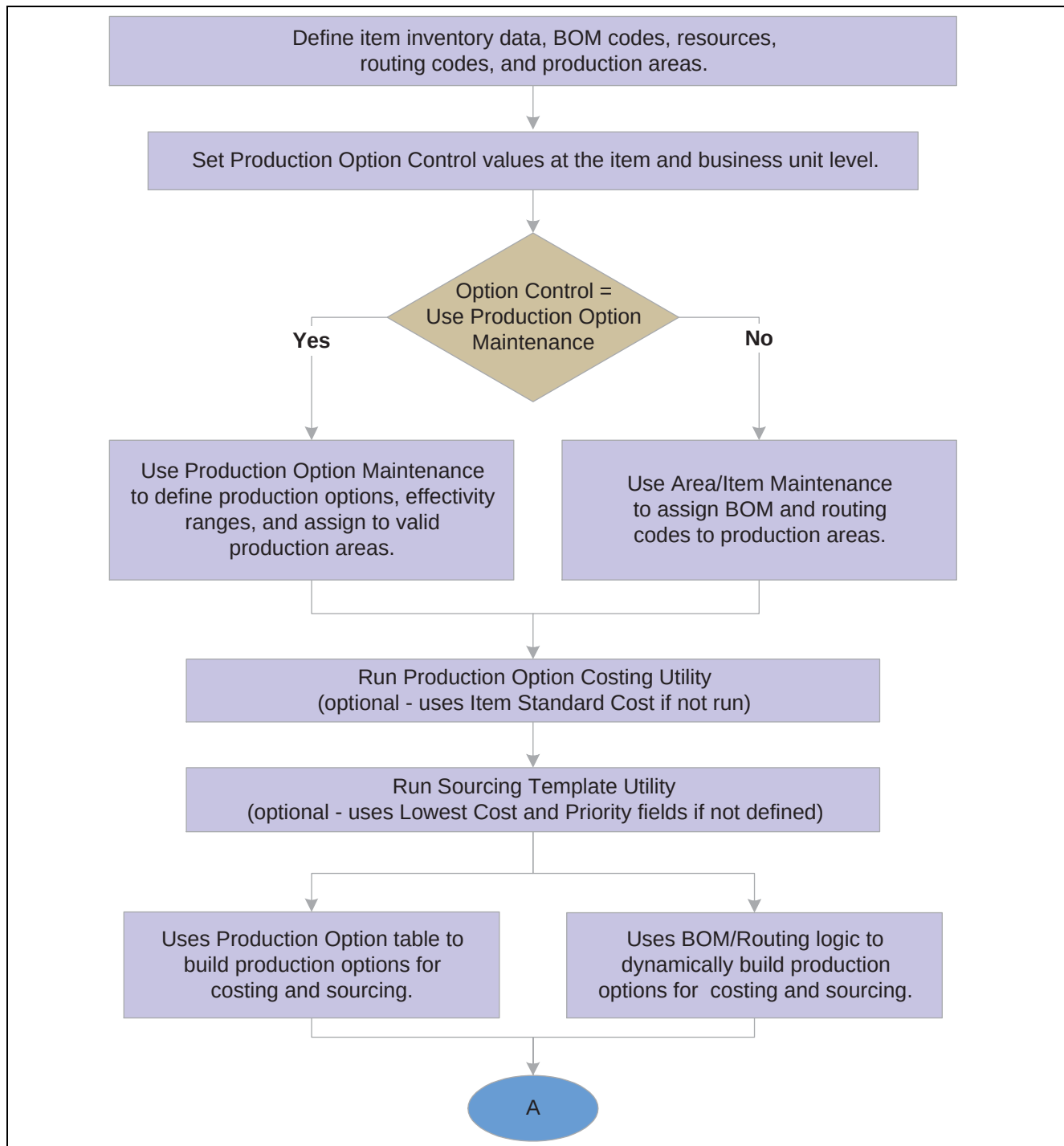
Production options are effective-dated BOM and routing combinations that can be extracted to PeopleSoft Supply Planning and used in production. Once you have defined your BOMs and routings, you can link individual production BOM codes to specific production routings, enabling you to define sets of valid BOM and routing combinations for an item. By specifying an effective and obsolete date for each combination, you can take into account seasonal variations in production. You can also indicate whether the production option is to be included in PeopleSoft Supply Planning, which determines whether the combination is valid in the planning instance and considered in the optimization process. During the optimization process, PeopleSoft Supply Planning recommends a production option based on the due date of the planned order.

During the production option definition, you can:

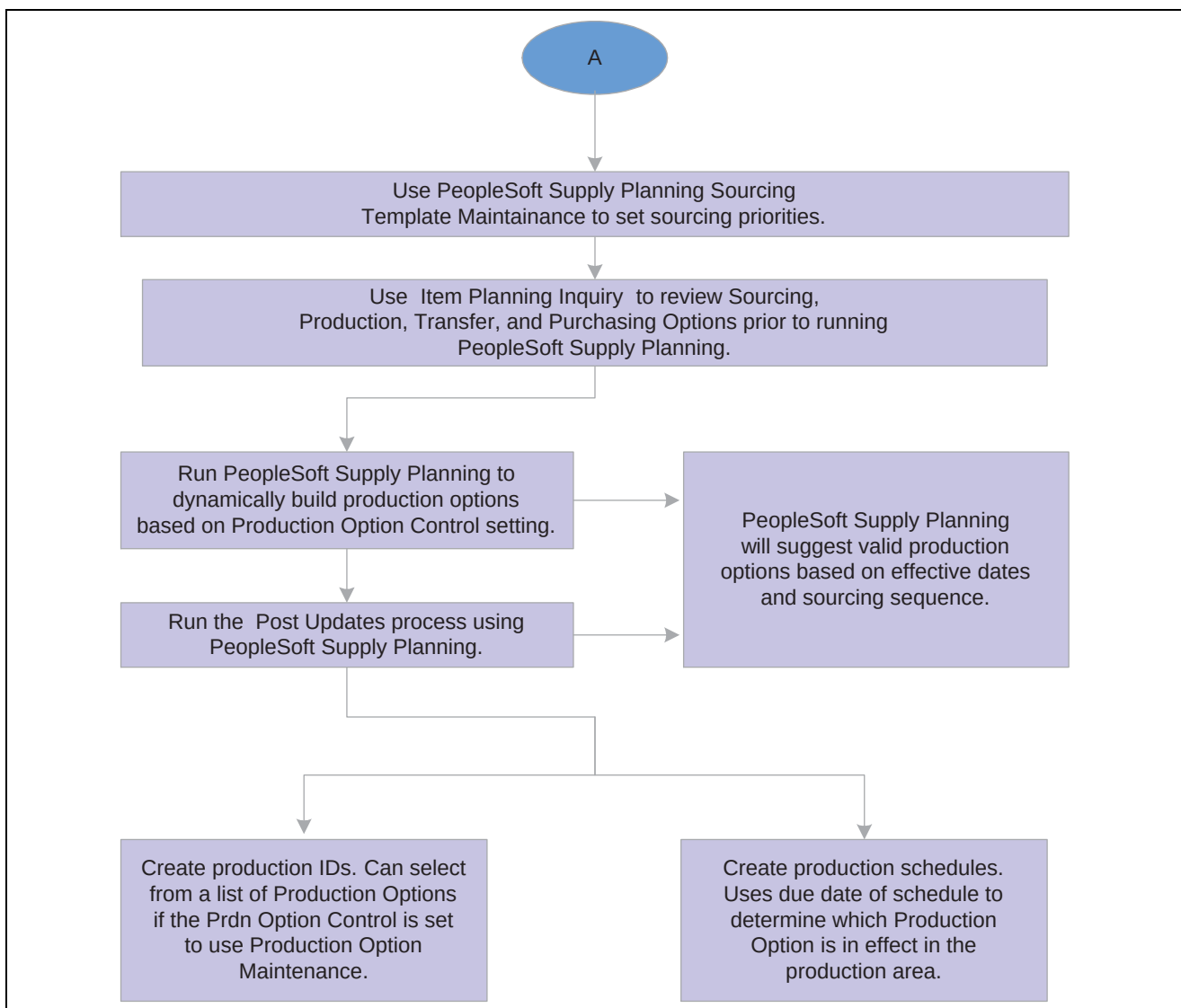
- Assign individual production options to specific production areas.
- List all production areas where an item can be built.
- Attach text and documents to production options.

A set of inquiries enables you to view all the data related to your production options, including component and output mix through which you can view, by operation, the components used and the outputs from that operation. In addition, you can copy production options within or between business units and automatically create production options for all or a range of items or production areas.

This flowchart provides a top-level view of how you can use production options:



Production Option Business Process Overview (1 of 2)



Production option business process overview (2 of 2)

Prerequisites

Before you begin defining and maintaining production options, you must perform several set up tasks:

1. Decide which items will use production options.
2. Define BOMs and routings for items using production options.
3. If you plan to associate production options with production areas, then production areas must already be defined within PeopleSoft Manufacturing using the Area - Summary page.

See Also

[Chapter 17, “Setting Up Production Areas,” page 355](#)

[Chapter 8, “Maintaining Bills of Material,” page 147](#)

[Chapter 14, “Structuring Routings,” page 281](#)

Defining Items that are to Use Production Options

To define items that will use production options, use the Production Option Maintenance component (EN_PDO_MAINT).

Page Used to Define Items that are to Use Production Options

Page Name	Object Name	Navigation	Usage
Define Business Unit Item - Manufacturing: General	GEN_ATTRIB_INV	Items, Define Items and Attributes, Define Business Unit Item, Manufacturing, General	Define production option control information for an item.

Defining Items Using Production Options

Access the Define Business Unit Item - Manufacturing: General page.

The screenshot displays the 'Define Business Unit Item - Manufacturing: General' page. At the top, there are tabs for General, Inventory, Substitutes, Manufacturing (selected), Planning, Configuration, and Custom. Below the tabs, the 'General' section is active, showing 'WIP Replenishment' as the item type. Key fields include 'Unit' (US012), 'Item ID' (000000000000020036), and 'Standard Unit of Measure' (CS). The item description is 'Creamy Tomato Sauce Bottled, 28 oz.'. The 'Production Area' field is empty, and 'Source Code' is set to 'Make'. 'Average Order Qty' is 375.0000, and 'Associated Primary BOM' is 000000000000020036. The 'Component Issue Method' section has 'Issue' selected. The 'BOM Usage' section has 'By Effectivity Date' selected. The 'Master Routing Option' section has 'Item' selected, and the 'Reference Routing Item' is 000000000000020036. The 'Production Option Control' section has 'Use BOM/Routing Defaults' selected, with 'BOM Code' and 'Routing Code' fields. The 'Valid Production Options only' checkbox is also present.

Define Business Unit Item - Manufacturing: General page

Production Option Control

Use BOM/Routing Defaults Use to create specific BOM and routing combinations for PeopleSoft Supply Planning.

If you select Use BOM/Routing Defaults, you cannot access the production option maintenance pages for the item, but you can limit the production options that are created in PeopleSoft Supply Planning by using the BOM Code and Routing Code fields.

Use Prdn Option Maintenance (use production option maintenance)

If you select Use Prdn Option Maintenance for a specific item ID, you can access the specified item using the Production Option Maintenance component. With these pages, you can define specific BOM and routing combinations that can be extracted to PeopleSoft Supply Planning and used in PeopleSoft Manufacturing. You can define effective start and end dates for the combinations in addition to assigning the combinations to valid production areas.

If you select Use Prdn Option Maintenance, select Valid Production Options only to use only predefined production options when creating production IDs.

If any BOM or routing combination is valid, leave this blank.

Note. You can only select Use Prdn Option Maintenance no area or items have been defined for the specific item. If you have already assigned an item to a production area in PeopleSoft Manufacturing, you cannot select Use Prdn Option Maintenance for that same item on the Define Business Unit Item - Manufacturing: General page. You can, however, create production options by running the Autocreate Production Options process, which sets the item's Production Options group box to Use Prdn Option Maintenance, rather than Use BOM/Routing Defaults.

Note. If you have marked an item to Use Prdn Option Maintenance, you must set the planning rates to be based on routings; you cannot select them to be based on lead time. If the item is already going to be produced based on lead times, you cannot select the Use Prdn Option Maintenance option on the Define Business Unit Item - Manufacturing: General page.

This table outlines the production options that you can create by entering various values in the BOM Code and Routing Code fields:

BOM Code and Routing Code Setting	Production Option Created
If both are blank.	System creates a production option for every possible BOM and routing combination.
If BOM Code field is not blank and Routing Code field is blank.	System creates a production option for all routing codes with the specific BOM code selected.

BOM Code and Routing Code Setting	Production Option Created
If Routing Code field is not blank and BOM Code field is blank.	System creates production options for all BOMs with the specific routing code selected.
If both are not blank.	System creates one production option for the single, specified BOM and routing combination.

By selecting a specific BOM and routing code, you can limit the number of BOM and routing combinations that are extracted by PeopleSoft Supply Planning. For example, by selecting a specific BOM code and routing code, you eliminate all but this specific combination from consideration by PeopleSoft Supply Planning. At the other extreme, if you leave both fields blank, then PeopleSoft Supply Planning extracts all possible combinations.

This example illustrates various BOM and routing values and the production options that would be created by various BOM code and routing code settings.

If a specific item has BOM codes 1, 2, and 3 and routing codes 1 and 2, here are the numbers of production options created in PeopleSoft Supply Planning, based on the BOM Code and Routing Code field settings:

BOM Code	Routing Code	Production Options Created	Total Combinations
Blank	Blank	1-1, 1-2, 2-1, 2-2, 3-1, 3-2	6
1	Blank	1-1, 1-2	2
Blank	2	1-2, 2-2, 3-2	3
1	2	1-2	1

The number of production options created in PeopleSoft Supply Planning depends on the BOM and routing default values.

Note. Only routing codes that have the Copy Routing to Planning check box selected in the Routing Definition - Header: Description page are copied to PeopleSoft Supply Planning.

Note. You can only select Use BOM/Routing Defaults if there are no production options defined for the item. If production options exist, you must manually delete them first.

Also, if you select Use BOM/Routing Defaults, use the Production Area Maintenance set of pages to define area BOM and routing combinations.

Production Option Control Setting	Steps Based on Control Setting
Select Use Prdn Option Maintenance to: • Define specific BOM and routing combinations that can be extracted to PeopleSoft Supply Planning or used to create production IDs and schedules. • Effective-date the BOM and routing combinations; this can be used to handle seasonal variations in the product mix.	1. Create BOM and routing codes for an item. 2. Use the Production Option Maintenance pages to link the BOM and routing codes together and (optionally) assign them to production areas. Select the Incl Plan (include in planning) check box to specify which BOM and routing combinations should be extracted to PeopleSoft Supply Planning. 3. Create production IDs and production schedules for the item.
Select Use BOM/Routing Defaults, if specific BOM and routing combinations are not required. Additionally, it's possible to limit the number of BOM and routing combinations extracted to PeopleSoft Supply Planning using the BOM and routing fields.	1. Create BOM and routing codes for an item. 2. Use the Production Area Maintenance pages to define area BOM and routing combinations.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining Generation of Item Supply Information

[Chapter 14, “Structuring Routings,” Defining Routing Header Information, page 287](#)

[Chapter 17, “Setting Up Production Areas,” page 355](#)

Creating Production Options

The Production Option Maintenance pages enable you to specify multiple production variations for an item and control the variations by effectivity dates. You do this by linking specific production BOM codes with specific production routings at the item level.

This section discusses how to:

- Define production options.
- Associate production areas.
- Manage production option attachments.

Common Elements in This Section



Click the Item Search button to access any of these pages:

- Component/Output Mix Inquiry: Select to view the components and outputs associated with the corresponding routing operation for the BOM code and routing code specified.

- **BOM Maintenance and Routing Maintenance:** If you did not specify a BOM or routing code, access the BOM Maintenance or Routing Maintenance components in Add mode.

However, if you entered a BOM or routing code, then you will view that BOM or routing in Update mode.

- **Copy Previous Row:** This page enables you to copy data from the previous row, and this option is only available on a newly inserted row. You can then make changes to the effective and obsolete dates, descriptions, and indicate whether this new production option should be available for extraction to PeopleSoft Supply Planning.

Pages Used to Create Production Options

Page Name	Object Name	Navigation	Usage
Production Option Maintenance - Definition	EN_PDO_BR	Manufacturing Definitions, Production Options, Define Production Options, Definition	Define production options and effective-dated BOM and routing combinations that can be extracted to PeopleSoft Supply Planning.
Production Option Maintenance - Production Area	EN_PDO_BR_PA	Manufacturing Definitions, Production Options, Define Production Options, Production Area	Associate production areas with each production option.
Production Option Maintenance - Text	EN_PDO_BR_TXT	Manufacturing Definitions, Production Options, Define Production Options, Text	Add production option text.
Production Option Maintenance - Documents	EN_PDO_BR_DC	Manufacturing Definitions, Production Options, Define Production Options, Documents	Associate documents with production options. Note. You must have PeopleSoft Engineering installed to access this page.
Production Option Maintenance - Attachments	EN_PDO_BR_ATT	Manufacturing Definitions, Production Options, Define Production Options, Attachments	Attach multimedia objects or files that relate directly to the production option. Once attached, you can view these objects directly from this page.

Defining Production Options

Access the Define Production Options - Definition page.

Definition		Production Area		Text		Documents		Attachments	
Unit:	US012	Std UOM:	GAL	Source Cd:	Make				
Item ID:	000000000000020020	Rtg Itm:	000000000000020020						
Classic Spaghetti Sauce - Processed - Mixed Spice & Tomatoes									
Production Options									
Customize Find View All First 1-7 of 12 Last									
BOM	Routing	*Eff Date	*Obs Date	*Description	Short Desc	Incl Plan			
1	1	01/01/2000	06/30/2000	Winter / Spring Classic	Winter / S	☒			
1	1	01/01/2001	06/30/2001	Winter / Spring Classic	Winter / S	☒			
1	1	01/01/2002	06/30/2002	Winter / Spring Classic	Winter / S	☒			
1	1	01/01/2003	06/30/2003	Winter / Spring Classic	Winter / S	☒			
1	1	01/01/2004	06/30/2004	Winter / Spring Classic	Winter / S	☒			
1	1	01/01/2005	06/30/2005	Winter / Spring Classic	Winter / S	☒			
2	1	07/01/2000	12/31/2000	Summer / Fall Classic	Summer / F	☒			

Define Production Options - Definition page

Rtg Itm (routing item)

Displays the master routing item if the item selected is linked to a master routing.

BOM and Routing

If you are adding a new production option, select the BOM code and routing code that you want to define as a production option for the item that you selected.

Eff Date (effective date) and **Obs Date** (obsolete date)

Enter the effectivity dates of the production option.

Incl Plan (include in planning)

Select if you want to make the production option available for extraction to PeopleSoft Planning. This field appears by default from the Copy to Routing check box in Routing Maintenance. If the Copy to Routing check box is selected, then this field is automatically selected.



Click the Select All or Deselect All buttons to control the Incl Plan field.

See Also

[Chapter 8, “Maintaining Bills of Material,” page 147](#)

[Chapter 14, “Structuring Routings,” page 281](#)

[Chapter 15, “Defining Production Options,” Viewing Component and Output Mix and Production Options, page 326](#)

Associating Production Areas

Access the Define Production Options - Production Area page.

Definition

Production Area

Text

Documents

Attachments

Unit:

US012

Std UOM:

GAL

Source Cd:

Make

Item ID:

000000000000020020

Rtg Itm:

000000000000020020

Classic Spaghetti Sauce - Processed - Mixed Spice & Tomatoes

Production Options

Find | View All

First

1 of 12

Last

BOM:

1

Routing:

1

*Eff Date:

01/01/2000

*Obs Date:

06/30/2000

*Description: Winter / Spring Classic

Production Areas

Customize | Find | View All

First

1 of 1

Last

*Production Area	Revision	Primary	Maintain PID	*Method	*Status	Rate Qty per Shift
SAUCE		☒	☒	Issue	Active	

Define Production Options - Production Area page

The BOM, Routing, Description, Eff Date (effectivity date), and Obs Date (obsolete date) fields appear by default from the Production Option - Definition page. For each production option, you can add one or more production areas using the Production Area field.

Note. You can select only one primary production area. Also, only one BOM and routing combination can be in effect in a production area at one time.

Because the same fields are being updated, the Revision, Primary, Maintain PID (maintain production ID), Method, Status, and Rate Qty per Shift (rate quantity per shift) fields operate identically to those fields on the Production Area Maintenance pages in PeopleSoft Manufacturing.

See Also

Chapter 17, “Setting Up Production Areas,” page 355

Managing Production Option Attachments

Access the Production Option Maintenance - Attachments page.

Attachments

- File Ext (file extension)

Select the type of media that you want to attach.
Set up file extensions using the File Locations page.
- Document ID and Description

Enter the file name and description of the multimedia file that you are attaching.
- 

Click the Attachments button to launch the multimedia object attached to the production option.

Using the Autocreate Production Options Process

You can automatically create production options by item ID or by production area. By using the autocreate production options process, you can quickly convert items that are currently not using production options to use production options.

Page Used to Create Production Options Automatically

Page Name	Object Name	Navigation	Usage
Autocreate Production Options	EN_PDO_AUTOCREATE	Manufacturing Definitions, Production Options, Autocreate Production Options	Create production options automatically by item ID or by production area.

Creating Production Options Automatically

Access the Autocreate Production Options page.

This page is useful for users who are new to the production option functionality. You can use it to create production options quickly for all or a range of items or production areas. Begin by selecting either Item ID or Production Area. Then, depending on your choice, the Item ID or Prdn Area (production area) fields become available for selection.

When you click the Save button, the system converts all items that are currently not using production options to using production options. For all items converted to production options, the item's Production Option Control value on the Define Business Unit Item - Manufacturing: General page is set to Use Prdn Option Maintenance. You can then access the item on the Production Option maintenance pages. This function automatically adds the BOM and routing combination defined in the production area as a production option.

Note. If an item is going to be produced based on lead times rather than routings, the item is not converted, because items set to Use Prdn Option Maintenance cannot use lead times.

Note. If you have already assigned an item to a production area in PeopleSoft Manufacturing, then you cannot select Use Production Option for that same item on the Define Business Unit Item - Manufacturing: General page. You can, however, create production options by using the autocreate functionality.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining Generation of Item Supply Information

Copying Production Options

You can copy production options from one item to another and across business units, if needed. This section lists common elements and discusses how to copy production options.

Common Elements Used in This Section



Click the View Related Links button to access any of these pages:

- Item Search: Search for a different item.
- BOM Copy: Copy BOMs from one business unit and item ID combination to another business unit.
- Routing Copy: Copy routings from one business unit and item combination to another business unit.
- Area Maintenance: View or maintain items for a specific production area.
- Production Option Maintenance: View or maintain existing production options.

Page Used to Copy Production Options

Page Name	Object Name	Navigation	Usage
Copy Production Options	EN_PDO_COPY	Manufacturing Definitions, Production Options, Copy Production Options	Copy production options from one item to another.

Copying Production Options

Access the Copy Production Options page.

Copy Production Options

Source

Unit: US012 Std UOM: GAL Search

Item ID: 000000000000020020 Classic Spaghetti Sauce - Proc

Target

Unit: US012 Std UOM: GAL

Item ID: 000000000000020013 Creamy Tomato Sauce - Processe

View Source View Target

☒ Copy Prdn Area Same As Except: Apply

☒ Copy Text

☒ Copy Att

Production Options

Customize Find View All First 1-2 of 12 Last

Copy	BOM	Routing	Eff Date	Obs Date	Description	Incl Plan
☒	1	1	01/01/2000	06/30/2000	Winter / Spring Classic	☒
☒	1	1	01/01/2001	06/30/2001	Winter / Spring Classic	☒

Copy Production Options page

Source

Unit and **Item ID**

Select the business unit and item ID whose production option you want to copy.

	Note. If the source item has been identified as using production options, but has no actual production options defined, then the system displays an error message, because there are no options to copy.
Search	Click to display the production options for the source item.
Target	
Unit and Item ID	Select the business unit and item ID. The target item ID cannot be identical to the source item ID. If the target item already has production options defined, the system provides the option either to not continue or to overwrite the existing production options on the target; you cannot overwrite any production option that is already in use on a production order.
Copy Prdn Area (copy production area), Copy Text and Copy Att (copy attachment)	Select to copy production areas, text, and attachments to the target item.
Same As Except	Select the production options to be copied by using this field. Values are: • <i>Excl'd All</i> (exclude all): Clears all the rows. • <i>Incl'd All</i> (include all): Selects all the rows. • <i>Incl'd Date</i> (include date): Enables you to specify a date range, and the system selects the options that are effective in that date range. If you've already selected a row, but it does not fall in the date range, the system does not clear the row. You can click the Apply button to apply the selection that you made in the Same As Except field. For example, suppose that you select <i>Excl'd All</i> and then click the Apply button, the system clears all the rows.
View Source and View Target	Click to view the production options for the respective items.
Copy	Select the rows that you want to copy to the target item. Note. You must select at least one production option to copy or the system displays an error message.
Save	Click and the system completes the copy.

See Also

[Chapter 8, “Maintaining Bills of Material,” Copying BOMs, page 181](#)

[Chapter 14, “Structuring Routings,” Copying Routings, page 301](#)

[Chapter 17, “Setting Up Production Areas,” Defining Production Area Summaries, page 362](#)

[Chapter 15, “Defining Production Options,” Creating Production Options, page 319](#)

Viewing Component and Output Mix and Production Options

This section discusses how to:

- Select component and output mix information.
- View component and output mix information.
- View production option definitional data.
- View production option production areas.
- View production option selections.

Pages Used to View Component and Output Mix and Production Options

Page Name	Object Name	Navigation	Usage
Component/Output Mix - Operation (inquiry)	EN_PDO_INQ_SUM	Manufacturing Definitions, Production Options, Review Component/Output Mix, Operation	Enter the search for the component and output mix, and view the routing operation sequences associated with BOM and routing combinations. You can view operation information such as tasks and work centers.
Component/Output Mix - Component/Output (inquiry)	EN_PDO_INQ_DTL	Manufacturing Definitions, Production Options, Review Component/Output Mix, Component/Output	View the component and output mix by routing operation for a BOM and routing combination at a particular time. This inquiry displays the inputs and outputs at each operation for a specific BOM and routing combination.
Production Option - Definition (inquiry)	EN_PDO_BR_INQ	Manufacturing Definitions, Production Options, Review Production Options, Definition	View production option data.

Page Name	Object Name	Navigation	Usage
Production Option - Production Area (inquiry)	EN_PDO_BR_INQ_PA	Manufacturing Definitions, Production Options, Review Production Options, Production Area	View the production area data that is defined for the production option.
Production Option - Text (inquiry)	EN_PDO_BR_INQ_TXT	Manufacturing Definitions, Production Options, Review Production Options, Text	View production option text.
Production Option - Documents (inquiry)	EN_PDO_BR_INQ_DC	Manufacturing Definitions, Production Options, Review Production Options, Documents	View documents that are associated with the production option. Note. You must have PeopleSoft Engineering installed to access this page.
Production Option - Attachments (inquiry)	EN_PDO_BR_INQ_ATT	Manufacturing Definitions, Production Options, Review Production Options, Attachments	View attachments that are associated with the production option.
Production Option Selection, Update Production (in PeopleSoft Supply Planning)	EN_PDO_SEL_SP , PL_SRC_PROD_SP	- Production Control, Production IDs/Schedules, Production Area, Summary, Summary Click the Item Search button next to the Item to access the Production Option Selection page. - Production Control, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the Production Option Selection button next to the BOM or Routing fields. - Supply Planning, Define Planning Attributes, Sourcing Templates, Define Sourcing Templates Click the Production button to select a production option.	View and select existing production options.

Selecting Component and Output Mix Information

Access the Component/Output Mix - Operation page.

Operation

Component/Output

Unit:
Prdn Opt Cntl:

Search

Item ID:
Rtg Itm:

Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream

BOM:
Routing:
BOM Qty:

Eff Date:

Operation List

Customize | Find | First 1-4 of 4 Last

Op Seq	Task Code	Description	Sub	Work Center	Description	Yield %
10			☐	PUMP	Pump Sauce	100.0000
20			☐	MIX	Mix Sauce	100.0000
30	COOKCR	Cook Creamy Sauce	☐	COOK	Cook Sauce	100.0000
40	QC-CR	Quality Control - Creamy	☐	QC/ADJ	Quality Control	100.0000

Component/Output Mix - Operation inquiry page

Unit and Item ID

Select the business unit and item ID for the BOM and routing combination that you want to view.



Click the View Related Links button to select one of these pages:

- Item Search: You can select a different item.
- Production Option Selection: You can view existing production options.

BOM, Routing, Revision and Eff Date (effectivity date)

Select the desired BOM, routing, effectivity date, and revision. If the item is revision-controlled, the system pulls the BOM revision data. If it's not revision-controlled, the system sets the effectivity date to today's date.

In addition, the system displays the BOM Qty.

Prdn Opt Cntl (production option control)

Displays the production option control, which indicates whether the item has been defined as using production options with the Define Business Unit Item - Manufacturing: General page. Therefore, it displays either *Prdn Opt* (use production option maintenance) or *BOM/Rtg* (BOM and routing combination defaults).

Rtg Itm (routing item)

Displays the item's reference routing. All of the data that appears is for the item's reference routing, if one exists.

Note. All of the data that appears is for the item's reference routing, if one exists.

Search

Click to populate the operation list. This section displays the operation sequence for the BOM and routing combination that you selected. The page also indicates whether the operation sequence is subcontracted, and displays the work center and its description.

In addition, clicking the Search button populates the Component/Output page in this component.

Note. A production option does not have to exist for you to view the BOM and routing combination data. You view the same information in either case. In addition, use this inquiry for multiple what-if scenarios.

See Also

[Chapter 17, “Setting Up Production Areas,” Defining Production Area Summaries, page 362](#)

[Chapter 15, “Defining Production Options,” Creating Production Options, page 319](#)

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining Manufacturing Information for an Item

Viewing Component and Output Mix Information

Access the Component/Output Mix - Component/Output inquiry page.

Yield %	This display-only field indicates the percentage of manufacturing items expected at the end of the operation sequence.

Note. If the BOM component and output operation sequence do not match the header operation sequence, an asterisk appears in front of the number. The header operation that appears against the output or component is an operation assigned when defining the BOM and might not match the routing operation. For components, the component appears as part of the first operation sequence. For outputs, the output appears as part of the last operation sequence.

Viewing Production Option Definitional Data

Access the Production Option - Definition inquiry page.



Click the Item Search button to view the components and outputs at each routing operation for a specific BOM and routing combination.

Viewing Production Option Production Areas

Access the Production Option - Production Area inquiry page.



Click the Item Search button to view the components and outputs at each routing operation for a specific BOM and routing combination.

Viewing Production Option Selections

Access the Production Option Selection page.

Select	Select this check box to populate the production option data on the page that called this page.

Using Production Options with Other PeopleSoft Applications

You define production options in PeopleSoft Manufacturing, but they also are present in PeopleSoft Supply Planning and PeopleSoft Cost Management. While the specifics of these impacts are discussed in the respective pieces of application documentation, this is a high-level discussion of the cross-product use of production options.

This section discusses how to:

- Use production options with PeopleSoft Supply Planning.
- Use production options with PeopleSoft Manufacturing.

Using Production Options with PeopleSoft Supply Planning

The Production Option Control check box (set at the item and business unit level on the Define Business Unit Item - Manufacturing: General page) determines how production options (formerly build options) are created in PeopleSoft Supply Planning.

There are two production option control options:

- Use Prdn Option Maintenance (production option maintenance).
- Use BOM/Routing Defaults.

Use Production Option Maintenance Setting

There are two different settings for the Production Option Control flag. If you select Use Prdn Option Maintenance, you can define specific BOM and routing combinations with effective dates assigned to each combination. You make these definitions with the Production Option Maintenance pages. All BOM and routing combinations with the Incl Plan (include in planning) check box are visible to PeopleSoft Supply Planning.

Use BOM and Routing Defaults Setting

If you select Use BOM/Rtg Defaults as the production option, you cannot define and maintain specific effective BOM and routing combinations, but you can still limit the number of production options created in PeopleSoft Supply Planning. For example, suppose that you have BOM codes 1, 2, and 3 and routing codes 1 and 2, then there are potentially six production options that can be created in PeopleSoft Supply Planning, if there is no way to limit that number. However, you can limit that number by using the BOM Code and Routing Code fields on the Define Business Unit Item - Manufacturing: General page. For example, if you select one specific BOM code and one specific routing code, then only one combination is extracted by PeopleSoft Supply Planning.

Other Production Option Planning Information

Regardless of the setting, it's possible to view the PeopleSoft Planning production options prior to running PeopleSoft Supply Planning by using the Item Planning Inquiry.

It's also possible to cost production options using the Production Option Costing Utility, so that an accurate build cost is sent to PeopleSoft Supply Planning for each production option. This utility effectively rolls up the costs for all production options in the range of items selected. Both the batch cost (total cost) and the unit cost can be viewed through the Item Planning Inquiry.

Using the sourcing template function, you can prioritize the production, transfer, and purchase options for an item and business unit, so that you have full control over how PeopleSoft Supply Planning creates new supply for the item.

Since PeopleSoft Supply Planning has visibility into the effective dates defined against the production option, the PeopleSoft Supply Planning recommends new planned production orders based on the current, effective BOM and routing combinations.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining Manufacturing Information for an Item

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner

Using Production Options with Production

This section discusses how production options are using in the manufacturing process.

Production ID Maintenance

If you select Use Prdn Option Maintenance for an item on the Define Business Unit Item - Manufacturing: General page, then any production options that you have predefined are available for selection in production ID maintenance. In addition, if the Valid Production Only check box is selected, only those BOM and routing combinations that have been set up in production option maintenance can be selected. If the check box is cleared, then any combination of BOM and routing codes can be entered for the item. The BOM and routing fields automatically change to the current BOM and routing combination that is effective for that item in the selected production area.

Production Schedule Maintenance

The item, production area, and the due date for each production schedule determine which BOM and routing combination is assigned to that schedule.

Although different BOM and routing combinations can be assigned to the same production area and item, there can be only one combination in effect at any one time. The due date of the schedule determines which BOM and routing combination is selected for that production schedule.

When completing against a production schedule, the BOM and routing effective date on the Record Completions/Scrap page determines the particular BOM and routing to be used for the production schedule. The BOM and routing effective date automatically changes to the current system date, and this field determines which combinations will be selected and appear in the BOM Code and Routing Code fields. For non-revision controlled items, this date is used to decide which BOM and routing combination will be used. A second effective date is used for the components and outputs. If the item is revision-controlled, then both the revision code and BOM and routing effective date must be selected. The revision code determines the components and outputs in effect for this revision, and the BOM and routing effective date determines the BOM and routing combination to use.

See Also

[Chapter 23, “Completing Operations and Recording Scrap,” page 521](#)

PART 3

Managing Your Production

Chapter 16
Using Serial Genealogy in PeopleSoft Manufacturing

Chapter 17
Setting Up Production Areas

Chapter 18
Maintaining Production Orders and Production Schedules

Chapter 19
Maintaining Component Lists

Chapter 20
Maintaining Operation Lists

Chapter 21
Releasing Production and Changing Production Statuses

Chapter 22
Issuing Material to Production

Chapter 23
Completing Operations and Recording Scrap

Chapter 24

Recording Completions and Scrap Using Electronic Data Collection

Chapter 25

Subcontracting

Chapter 26

Closing Production

Chapter 27

Archiving and Purging Production Data

Chapter 28

Scheduling Operations

CHAPTER 16

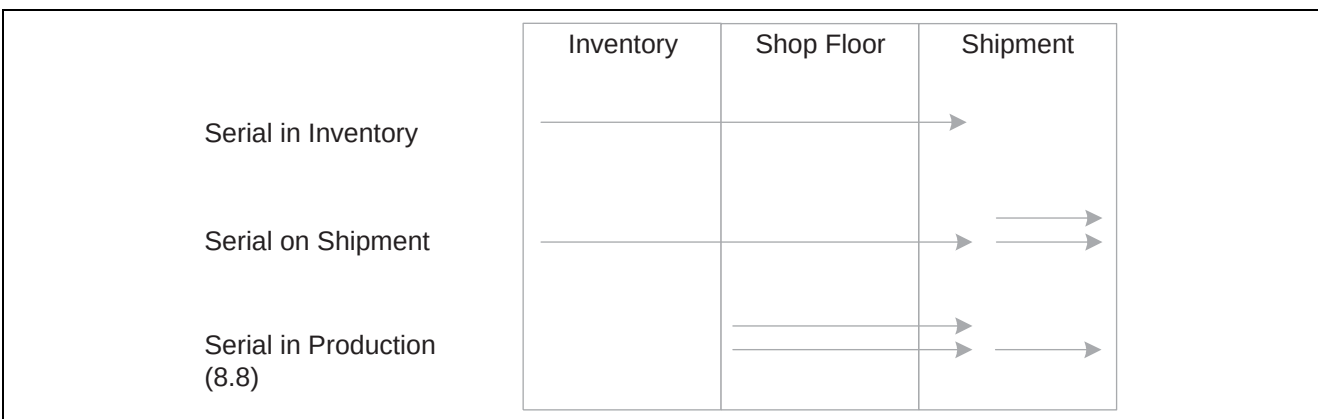
Using Serial Genealogy in PeopleSoft Manufacturing

This chapter provides an overview of serial genealogy in PeopleSoft Manufacturing and discusses how to:

- Set up items to be traced by serial genealogy.
- Associate assembly items and components.
- Disassociate assembly items and components.
- Maintain production being traced by serial genealogy.
- Review serial genealogy information.
- Make serial association using third-party systems.
- Make serial associations using the batch process.
- Generate serial ID labels.
- Generate serial genealogy exception reports.

Understanding Serial Genealogy

Prior to Release 8.8, PeopleSoft handled serial processing as illustrated in this diagram:



PeopleSoft and serial processing prior to Release 8.8

With PeopleSoft Manufacturing 8.8, you can trace the location and constituent components of finished goods items and trace source and usage of component parts during the production process.

Serial genealogy tracks the source and destination of any serialized item. A serialized item may be used in a serialized assembly, scrapped, used in a higher level serialized assembly that is then shipped to a customer.

Serial IDs may be associated with your production IDs at any time during the manufacturing process.

For rework or teardown production IDs, you do not manually associate serial IDs to the assembly. The serial association occurs when you issue the assembly that is to be reworked or torn down through the picking process or kit issues.

In addition to associating a serial ID with the assembly item, you can associate component serial IDs with an assembly serial ID.

You can correct errors by disassociating the serial ID from the assembly or disassociating the component from the assembly serial ID.

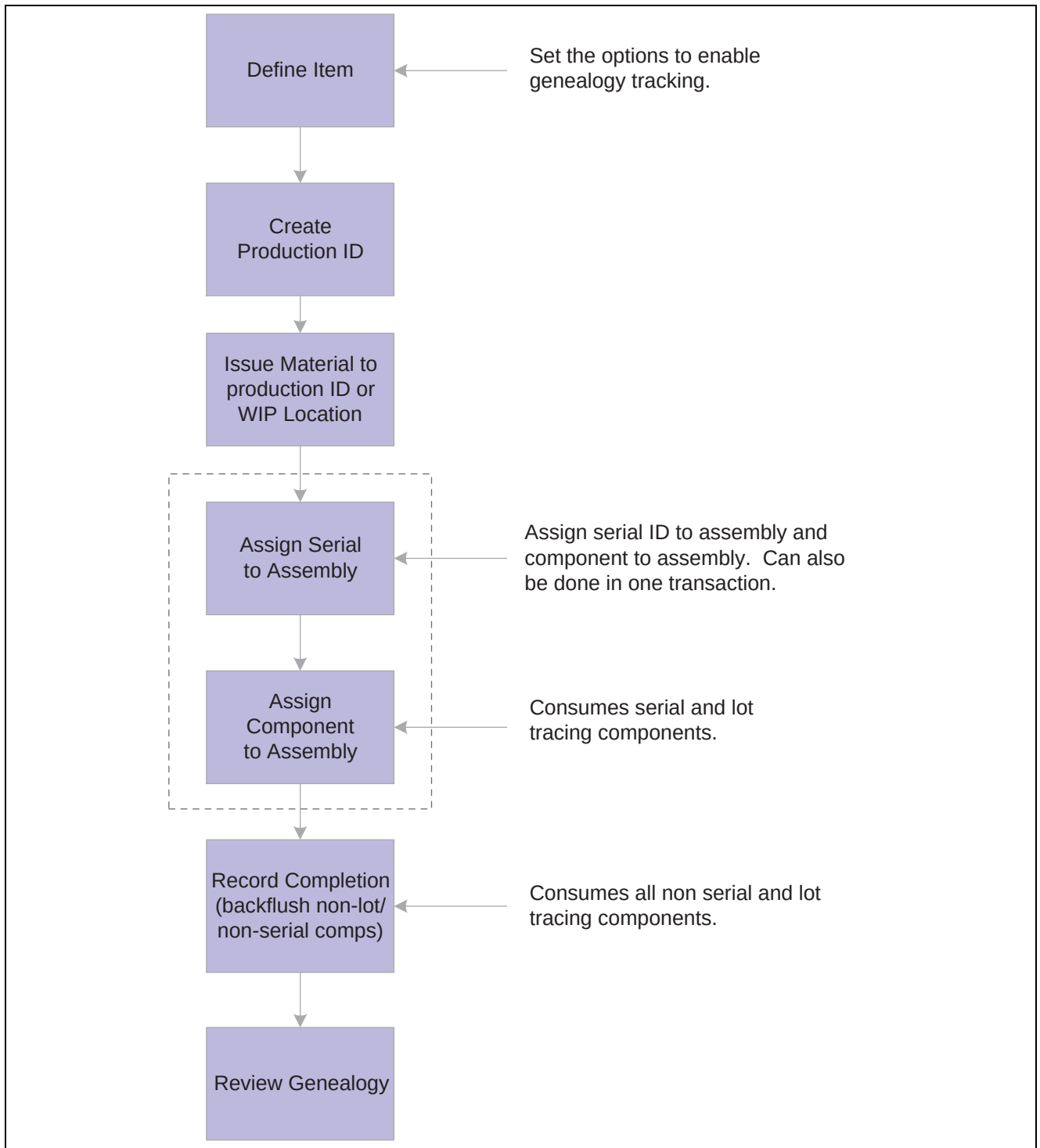
In addition, we provide an inquiry that displays the genealogy of a serialized item through multiple levels of BOMs. This inquiry also displays the transaction information associated with the serialized item.

Note. Serial genealogy is tracked with *single* output production orders (IDs) only.

Serial genealogy is not tracked on:

- Production schedules.
- Production IDs with multiple outputs such as co-products or by-products.
- Components with an quantity code of *per order*.

This diagram illustrates the serial genealogy process flow as of Release 8.8:



Serial Genealogy Process Flow

See Also

[Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371](#)

[Chapter 22, “Issuing Material to Production,” page 481](#)

[Chapter 23, “Completing Operations and Recording Scrap,” page 521](#)

[Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” page 585](#)

[Chapter 26, “Closing Production,” page 615](#)

Setting Up Items to be Traced by Serial Genealogy

This outlines the steps necessary to use serial genealogy:

1. Define and approve the item that will use serial genealogy using the Define Items - Inventory: Tracking Description page.
Set the appropriate serial tracking options.
2. Create a BOM and add the serial genealogy item using the Maintain BOMs and Revisions - Manufacturing BOMs: Summary page.
3. Create a production ID for the item to be produced using the Production ID Maintenance page.
4. Issue material to production using the various material issue processes.
5. Associate the serial ID to the assembly using the Assembly Serial page.
6. Associate the component serial ID or lot ID to the assembly using the Component Serial page.
Review the association by accessing the Genealogy Search (review) page.
Use the Maintain Serial Genealogy component to maintain or associate additional serial IDs.
7. Complete production using the Record Completions and Scrap component.

Note. You can associate a serial ID to an assembly at any time during the manufacturing process.

Serial ID Tracking Control

PeopleSoft Manufacturing enables you to track serial IDs by providing various options to determine the exact amount of control that you need.

Serial control indicates that you want to track the serial ID for each material movement transaction:

- Ship Serial: Indicates that you want to track the serial ID when you ship an item.
- Serial in Production: Indicates if you want to trace the genealogy of the assembly item during production.
- Trace Usage: Indicates if you want to trace the component as it is used in a specific serial assembly.

The combination of these options determines the level of serial control.

See Also

[Chapter 23, “Completing Operations and Recording Scrap,” page 521](#)

[Chapter 8, “Maintaining Bills of Material,” page 147](#)

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items”

Page Used to Set Up Items to be Traced by Serial Genealogy

Page Name	Object Name	Navigation	Usage
Define Item: Inventory - Tracking Description	INV_ITEMS_DEFIN2	Items, Define Items and Attributes, Define Item, Inventory, Tracking Description	Set serial genealogy options to enable genealogy tracing.

Defining Items Using Serial Genealogy

Access the Inventory - Tracking Description page.

Item Tracking

Serial in Production

Select this option if you want to track the key serial and lot components that make up this assembly item. You will assign a serial ID to the item during the manufacturing process. You will also identify serial and lot components that are used to produce this item.

This field can be used with and without the serial control option. If you do select serial control, then you will enter the serial ID for all material movement transactions. If you do not select the serial control option, then the system tracks the serial ID during the production process. This means that you assign a serial ID to the item during production and associate serial and lot components to this serial assembly. During completions you'll complete the serial ID to inventory.

Note. Typically, if you select Serial in Production, either *Serial Control* or *Ship Serial* will also be enabled. If you select serial in production and not serial control, during subsequent inventory movements of this item, you will not need to enter the serial ID.

Trace Usage

This option is used for component items and enables associating the component's serial or lot ID with a higher-level assembly item whose serial in production option is selected. Values include:

- *Serial*: Select to enable this component's serial ID to be tracked in a higher level assembly whose Serial in Production option has been selected. If the component's Lot Control option has been selected, then both the serial ID and Lot ID will be tracked.
- *Lot*: Select to enable this component's lot ID to be tracked in a higher level assembly whose serial in production option is Yes. To select the trace usage option of Lot, the item's lot control option must be selected.

- *None*: Select if you do not want to track this item.

Similar to serial in production, trace usage can be used in conjunction with the Serial Control option. If Serial Control option is selected, then the serial ID will be identified in inventory, and this serial ID remains with the item throughout the entire manufacturing process. If serial control is not selected, then the serial ID will not be identified in inventory but a serial ID will be specified when the item is associated with a serial assembly. This allows tracking the genealogy without requiring the need to track the serial ID in inventory.

Note. Typically, if you select the trace usage option of Serial or Lot, the assembly items that this item is used on is set to Serial in Production.

Note. If you change any of these values, it will have an effect on *new* production. Any existing production will retain the serial in production value at the time that the production ID was created. Components will retain the values at the time the component list is created.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items”

Associating Assembly Items and Components

You can associate assembly items to serial IDs and components to serialized assemblies by using the Assembly Serial page. You can access this page from the Production Control or Data Exchanges navigations.

This section discusses:

- Associating assembly items to serial IDs.
- Associating components to serialized assemblies.

Pages Used to Associate Assembly Items and Components

Page Name	Object Name	Navigation	Usage
Assembly Serial	BCT_MG_PRDN	• Production Control, Process Production, Production Genealogy, Record Assembly Serial • Data Exchanges, Create Transactions, Manufacturing, Assembly Serial Association	Associate serial IDs with assembly items of a production ID. Use Transaction Code 800 — <i>Associate Assembly</i> to associate a serial ID with a production ID.
Component Serial	BCT_MG_USAG	• Production Control, Process Production, Production Genealogy, Record Component Serial • Data Exchanges, Create Transactions, Manufacturing, Component Serial Association	Associate serial or lot components with an assembly serial (Transaction Code 802). Can also be used to associate a serial ID with an assembly and associate the component serial ID or lot ID with that serial assembly (Transaction Code 804).

Associating Assemblies to Serial IDs

Access the Assembly Serial page.

Assembly Serial

Business Unit: US008

Last Trans Nbr.: 3000000000000159000000001

Transaction Code: 0800 Associate Assembly

Production ID: DGR8300

Area: FINAL

Status: In Process

Item ID: GR8300

Crank Set Subassembly

Quantity: 2.0000

Serial ID

Find First 1-2 of 2 Last

Serial ID: 1

Serial ID: 2

Error Messages

Customize Find First 1 of 1 Last

General Details

	Message	Go to Error Row	DateTime
1		Go to Error Row	

Assembly Serial page

Use this page to associate a serial ID to the production ID.

Note. The Serial in Production option must be selected for the production ID.

To associate a serial ID with an assembly using Transaction Code 800 — Associate Assembly:

1. Select the Production ID.
2. Enter a Quantity. The Serial ID group populates with the number of lines based on the quantity entered.
3. Enter a Serial ID to associate with the production ID.
4. Upon saving this page, any errors, such as the serial ID may have already been associated with a different production ID, display in Error Messages.

Note. If you made the association using the Production Control navigation, the transaction is processed upon save. However, if you used the Data Exchanges navigation, the transaction will not be processed until you run the Process Serial Association process.

See [Chapter 16, “Using Serial Genealogy in PeopleSoft Manufacturing,” Making Serial Associations Using the Batch Process, page 352.](#)

Associating Components to Serialized Assemblies

Access the Component Serial page.

Component Serial

Business Unit:

US008

Last Trans Nbr.:

3000000000000159000000001

Transaction Code:

0802 Associate Component

Production ID:

DGR8300

Area:

FINAL

Status:

In Process

Item ID:

GR8300

Crank Set Subassembly

Serial ID:

SGR8300-1

Component ID:

Op Seq:

Orig Comp ID:

Per:

Quantity:

Std UOM:

Comp Lot ID:

Serial ID

Find

First

1 of 1

Last

Serial ID:

1

Error Messages

Customize | Find

First

1 of 1

Last

General

Details

	Message	Go to Error Row	Date Time
1		Go to Error Row	

Component Serial page

Associate serial or lot components to a serial assembly by using Transaction Code *0802 - Associate Component*.

If you're associating both assemblies and components, use Transaction Code *0804 - Associate Assembly & Component*.

Production ID and Serial ID Enter values.

Associate Assembly Serial If you're using Transaction Code 804, this check box will be automatically selected. When selected, the system associates the serial ID with the production ID. Once the first serial association is saved, this check box will be cleared so you can associate additional component serial IDs to the serial assembly. If you want to associate serial IDs to assemblies and component serials, then you should select this check box.

Component ID Enter the component that you're associating or disassociating from the production ID.

Op Seq, Orig Comp ID and Per You do not have to enter values for these fields. The system will populate them. If the component ID exists at multiple operation sequences or the

	component is a substitute item you will need to specify this information in order to identify the exact component you are associating or disassociating.
Quantity	Enter the number of components that you are associating or disassociating.
Serial ID	The Serial ID group populates the number of lines based on the quantity entered. Enter or select the appropriate serial ID number.
Lot ID	Enter or select the appropriate lot ID
Error Messages	View any errors associated with the component association.

Note. Upon Save, the production ID field is not cleared. You can add (associate) another component.

If you made the association using the Production Control navigation, the transaction is processed upon save. However, if you used the Data Exchanges navigation, the transaction will not be processed until you run the Process Serial Association process.

In addition, issue and replenish components are consumed from the WIP location upon association. Kit components are associated as they have already been consumed on the production ID.

See [Chapter 16, “Using Serial Genealogy in PeopleSoft Manufacturing,” Making Serial Associations Using the Batch Process, page 352.](#)

Disassociating Assemblies and Components

Use the Assembly Serial and Component Serial pages to disassociate serial IDs from assemblies, and to remove components from serialized assemblies. Access these pages from the Production Control or Data Exchanges navigations.

This section discusses how to:

- Disassociate assemblies from serial IDs.
- Disassociate components from serialized assemblies.

Pages Used to Disassociate Assemblies and Components

Page Name	Object Name	Navigation	Usage
Assembly Serial	BCT_MG_PRDN	- Production Control, Process Production, Production Genealogy, Record Assembly Serial - Data Exchanges, Create Transactions, Manufacturing, Assembly Serial Association	Disassociate serial IDs with assembly items of a production ID. Use Transaction Code <i>0801-Disassociate Assembly</i> to disassociate a serial ID from the assembly.
Component Serial	BCT_MG_USAG	- Production Control, Process Production, Production Genealogy, Record Component Serial - Data Exchanges, Create Transactions, Manufacturing, Component Serial Association	Disassociate serial or lot components with an assembly serial.

Disassociating Assemblies from Serial IDs

Access the Assembly Serial page.

To disassociate a serial ID with an assembly by using Transaction Code 801 — Disassociate Assembly:

1. Select the Production ID.
2. Enter a Quantity. The Serial ID group populates with the number of lines based on the quantity entered.
3. Enter a Serial ID to disassociate from the production ID.
4. Upon saving this page, any errors, such as the serial ID may have already been associated with a different production ID, display in Error Messages.

Note. If you made the disassociation using the Production Control navigation, the transaction is processed upon save. However, if you used the Data Exchanges navigation, the transaction will not be processed until you run the Process Serial Association process.

See [Chapter 16, “Using Serial Genealogy in PeopleSoft Manufacturing,” Making Serial Associations Using the Batch Process, page 352.](#)

Disassociating Components from Serialized Assemblies

Access the Component Serial page.

To disassociate a component from a serial assembly, use Transaction Code 803 — Disassociate Component.

1. Select the Production ID (serial assembly).
2. Select a Serial ID to disassociate from the production ID.
3. Select the Component ID to be disassociated.

4. Enter a Quantity of the component to be disassociated.
5. Upon saving this page, any errors, such as the serial ID may have already been associated with a different production ID, display in Error Messages.

Note. If you made the disassociation using the Production Control navigation, the transaction is processed upon save. However, if you used the Data Exchanges navigation, the transaction will not be processed until you run the Process Serial Association process.

See [Chapter 16, “Using Serial Genealogy in PeopleSoft Manufacturing,” Making Serial Associations Using the Batch Process, page 352.](#)

Maintaining Production Being Traced by Serial Genealogy

This section discusses how to maintain production being traced with serial genealogy.

Page Used to Maintain Production Being Traced by Serial Genealogy

Page Name	Object Name	Navigation	Usage
Genealogy Search (process)	SF_TRACE_U_SRCH	Production Control, Process Production, Production Genealogy, Maintain Serial Genealogy	Select the production ID to which you want to do an association or disassociation.
Production Picking	BCT_MG_PIK	Data Exchanges, Create Transactions, Manufacturing, Production Picking	For rework or teardown production IDs, enter the serial ID for the assembly items being reworked or torn down. The system associates the serial ID to the production ID. See Chapter 22, “Issuing Material to Production,” page 481 .
Kit Issue/Return Location, Kit Issue/ReturnKit Issue/Return Location page	SF_KIT_ISSUE_EXPR, BCT_MG_MIS	- Production Control, Process Production, Issue Materials, Issue/Return Kit Components - Data Exchanges, Create Transactions, Manufacturing, Kit Issues/Returns	For rework or teardown production IDs, enter the serial ID for the assembly items being reworked or torn down. The system associates the serial ID to the production ID. See Chapter 22, “Issuing Material to Production,” page 481 .
Review Plan	SF_PICK_TRANS	Production Control, Process Production, Issue Materials, Review Plan	For rework or teardown production IDs, enter the serial ID of the assembly items being reworked or torn down. The system associates the serial ID to the production ID. See Chapter 22, “Issuing Material to Production,” page 481 .
Recording Completions and Scrap	SF_COMPL_ID, BCT_MG_CPL	- Production Control, Process Production, Complete Production, Record Completions and Scrap - Data Exchanges, Create Transactions, Manufacturing, Record Completions and Scrap	Associate assembly serial IDs if the serial that is being completed and has not already associated. See Chapter 23, “Completing Operations and Recording Scrap,” page 521 and Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” page 585 .

Reviewing Serial Genealogy Information

This section discusses how to:

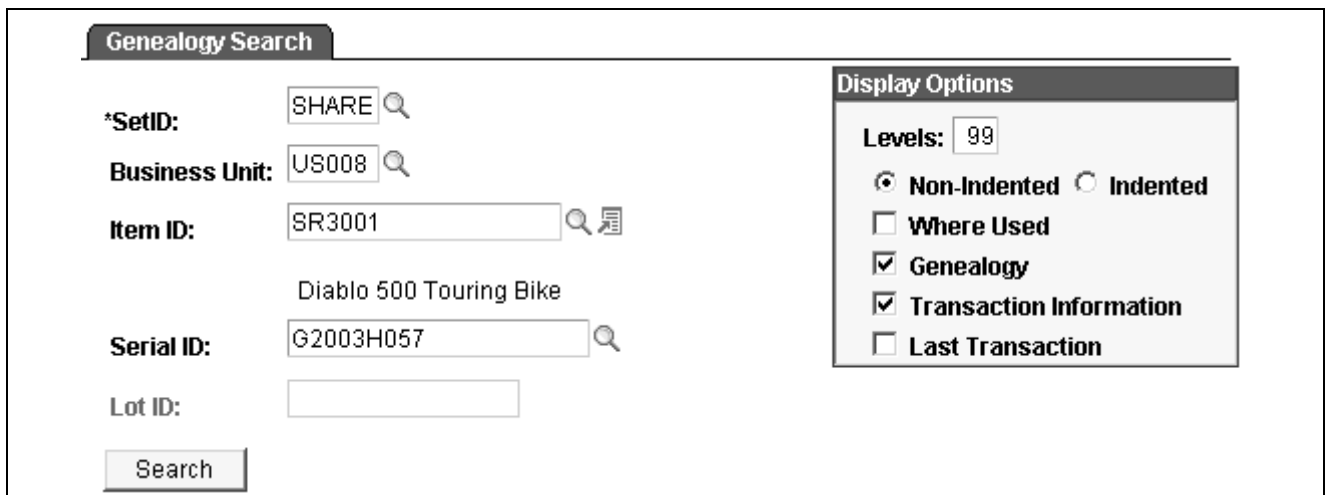
- Enter genealogy search review criteria.
- Review serial genealogy information.
- Review traceability information.

Pages Used to Review Serial Genealogy Information

Page Name	Object Name	Navigation	Usage
Genealogy Search (review)	SF_TRC_SER_INQ1	Production Control, Process Production, Production Genealogy, Review Serial Genealogy	Enter selection criteria for serial genealogy inquiry. Use the Review Serial Genealogy to view the genealogy of an item/serial. You can also view where the item/serial currently is at, such as which higher level assembly item it has been used in or to which customer it has been shipped.
Genealogy (review)	SF_TRC_SER_INQ2	Enter information on the Genealogy Search (review) page and click the Search button.	Displays genealogy information for the item (serial ID) specified in the search criteria. Displays where used and genealogy information.
Genealogy with Traceability	SF_TRC_SER_INQ3	Enter information on the Genealogy Search (review) page. You must select Transaction Information as a display option on the Genealogy Search page. Click the Search button.	View transaction information for the item/serial ID specified in the search criteria. Information is displayed in a grid format.
Transaction (review)	SF_TRC_SER_INQ4	Enter information on the Genealogy Search (review) page and click the Search button. Click a serial ID or lot ID link.	View transaction information associated with the specific serial or lot ID. Information is displayed in a pop up window.

Entering Genealogy Search Review Criteria

Access the Genealogy Search (review) page.



Genealogy Search (review) page

Item ID and Serial ID Enter values.

Display Options

Select any of these display options:

Levels Enter the number of levels that you want to display. The default is 99.

Non-Indented or Indented

- *Non-Indented*: Select if you do not want an non-indented format.
- *Indented*: Select if you want to view the genealogy structure in an indented format.

Where Used Select this check box if you want to go up the genealogy tree to display where the serial ID is used. This check box is not limited to just production where used. Information relating to which customer the item has been shipped to will also display.

Genealogy Select if you want to see the children of the serial selected.

Transaction Information Select if you'd like to view the transaction history for the item.

Note. You must select this option to access the Genealogy with Traceability page.

Last Transaction Select if you want to see the last transaction that has occurred for this item or serial ID. For example, if the last transaction is a shipment transaction, the customer to whom this serial ID has been shipped displays.

Reviewing Serial Genealogy Information

Access the Genealogy (review) page.

Genealogy Search
Genealogy
Genealogy with Traceability

SetID: SHARE
Business Unit: US008
Item ID: SR3001
Lot ID:
Levels: 99
View: Non-Indented
Diablo 500 Touring Bike
Serial ID: G2003H057

Item Type
☐ Serial Control
☐ Lot Control
☒ Shipping Serial Control
☒ Serial in Prdn
Trace Usage: None

Where Used/ Components						
Lvl	Item ID	Description	Serial ID	Lot ID	UOM	Quantity
0	SR3001	Diablo 500 Touring Bike	G2003H057		EA	
1	LT5000	Standard Wheel Subassembly		LOT-5001	EA	2.0000
1	SR2201	Gear Subassembly	J2003K088		EA	1.0000
2	GR8000	Gear, Sugishita	G890A10		EA	1.0000
2	GR8500	Crank Set Subassembly	X2003Y099		EA	1.0000
3	GR8301	Bottom Bracket Axle	B2003C123		EA	1.0000
2	HB7300	Hub Subassembly	S70103	LOT-7001	EA	1.0000
1	SR2300	Brake Subassembly	S30301		EA	1.0000

Genealogy (review) page

Item Type

Serial Control, Lot Control, Shipping Serial Control, Serial in Prdn, Trace Usage These item attributes are display only and are the default values from the Define Items component.

Where Used Components

Serial ID Click to access the transaction information for the item.

Lot ID Click to access the transaction information for the item.

Transaction Information Tabs

Access any of these Transaction Information tabs:

- Common** View general information such as date and time of transactions, such as production association, or production disassociation and quantities of the items.
- Production** View production information such as Prdn ID, Prdn Type, production Area, and Prdn ID split information such as To Prdn ID and To Prdn Area.
- Shipment** View shipping information such as Ship To ID, Customer Name, Order No., Ship to, and RMA Number.
- Inventory** View inventory-related information such as the Storage Area where the item is stored.
- Purchasing** View purchasing-related information such as Order No., Order Line, Vendor ID, Vendor Name, and Return to Vendor ID.

Reviewing Traceability Information

Access the Genealogy with Traceability page.

Genealogy Search | **Genealogy** | **Genealogy with Traceability**

SetID: SHARE **Levels:** 1
Business Unit: US008 **View:** Non-Indented
Item ID: SR3001 **Diablo 500 Touring Bike**
Lot ID: **Serial ID:** G2003H057

Item Type

- ☐ Serial Control
- ☐ Lot Control
- ☒ Shipping Serial Control
- ☒ Serial in Prdn

Trace Usage: None

Where Used/ Components Find First 1-4 of 4 Last

Lvl: 0 **Item ID:** SR3001 **Serial ID:** G2003H057 **UOM:** EA

Diablo 500 Touring Bike **Quantity:**

Transaction Information Customize | Find | First 1-3 of 3 Last

Inv BU	Description	Date/Time	Updated By	Base Qty	UOM
US008	Shipped	10/28/03 4:59:41.000000PM	SAMPLE	1.0000	EA
US008	Production Completion	10/28/03 3:38:05.000000PM	SAMPLE	1.0000	EA
US008	Production Association	10/28/03 3:35:55.097000PM	SAMPLE	1.0000	EA

Genealogy with Traceability page

This page appears when you select the Transaction Information display option on the Genealogy Search page.

Making Serial Associations Using Third-Party Systems

This section discusses how to make serial associations for production using third-party systems such as electronic data collection or a MES.

PeopleSoft Manufacturing uses the Production Serial Association EIP to import production data that has been associated with serial genealogy by an external system.

See Also

[Chapter 1, “Getting Started with PeopleSoft Manufacturing,” page 3](#)

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points”

Making Serial Associations Using the Batch Process

You can use the Run Serial Associations (SF_TRC) batch process to associate or disassociate production from serial genealogy. You'll run this batch process if you associated or disassociated production using the Data Exchanges navigation. You will also need to run this process if you have used the Production Serial Association EIP to load associate or disassociate transactions.

Page Used to Make Serial Associations Using the Batch Process

Page Name	Object Name	Navigation	Usage
Run Serial Assoc	RUN_SF_TRC	- Data Exchanges, Process Transactions, Manufacturing, Process Serial Associations, Run Serial Assoc - Production Control, Process Production, Production Genealogy, Process Serial Associations	Run the batch process for a specific business unit or all business units. You can also run the process based on a specific EIP, range of EIPs or all EIPs. Process serial associations that were loaded through EIPs or through the data collection pages under the Data Exchanges navigation. EIPs can be sent from third-party systems such as a data collection system or a manufacturing execution system (MES).

Generating Serial ID Labels

This section discusses how to generate bar code labels for serialized items.

Page Used to Generate Serial ID Labels

Page Name	Object Name	Navigation	Usage
Serial Label	RUN_INS6035	Data Exchanges, Barcode Labels, Serial Label	Create barcoded serial labels for serialized items. See <i>PeopleSoft Inventory 8.8 PeopleBook</i>, "PeopleSoft Inventory Reports".

Generating Serial Genealogy Exception Reports

You can generate serial genealogy exception reports that list those production IDs that have association inconsistencies.

This section discusses how to generate exception reports for production being traced by serial genealogy, and how to correct the exception messages that may occur.

Page Used to Generate Serial Genealogy Exception Reports

Page Name	Object Name	Navigation	Usage
Genealogy Except (report)	RUN_SF_TRC001	Production Control, Process Production, Production Genealogy, Genealogy Exception Report	Generate a report that lists those production IDs that have association inconsistencies.

Reviewing Genealogy Exception Report Messages

This table discusses the exception messages that you may encounter when you generate a Genealogy Exception Report.

Genealogy Report Exception Messages

Exception Message	Warning Description
Assembly Exceptions Serial IDs not associated with Assembly Scrap	There is assembly scrap that does not have a serial ID associated with it. If you want to associate serial IDs to the scrap, you will need to reverse the scrap and then rescrap.
Serial IDs associated > Completed + Scrap	There are serial IDs associated with the production ID that have not been completed or scrapped. You should verify that the serial IDs are still in production
Component serial/lot association rows do not exist	There are completed serial assemblies that do not have any serial or lot components associated. You may need to enter your component association transactions.
Component Exceptions Component Issue <> Trace Usage	You have consumed more serial IDs than have been associated with an assembly. You should verify the correct component associations have been recorded.
Component serial/lot association rows do not exist	You have consumed quantity but no component association rows have been recorded. You should verify the correct component associations have been recorded.
Comp List qty per <> Sum of Trace Issue Qty	You have associated more or less quantity than what is scheduled. You should verify the correct component associations have been recorded.

See Also

[Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS8000 - Genealogy Exception Report, page 677](#)

CHAPTER 17

Setting Up Production Areas

This chapter provides an overview of production areas and discusses how to define and maintain production areas.

Understanding Production Areas

Set up production areas before you begin tracking manufacturing processes on the shop floor. Define the production area's default WIP locations, the WIP, rework and teardown accounts, items that are manufactured within each production area, and how each item will be manufactured.

You can associate multiple items with a production area, or you can associate an item with multiple production areas. For example, you can designate one production area for regular production of an item and another for rework or teardown production.

You can define how to move components to the shop floor, and how to track production information. For example, do you want to use discrete orders, or do you want to track production by day and shift?

When planned orders are generated, they are associated with a production area defined for an item. A production area can:

- Represent a production line, production cell, or manufacturing process.
- Contain all of the work centers necessary to manufacture an item.

Before defining the production area and item relationship, determine how you plan to use production areas to track production on your shop floor:

- Decide whether you plan to use discrete production orders (production IDs) or use production schedules to manufacture repetitively.
- Determine how you plan to issue components to production for each production area and item combination.
- Defining a set of WIP accounts for each production area.

Note. Production areas cannot be deleted.

Tracking Production

After you determine which items are going to be manufactured in each production area, decide whether you want to use discrete production IDs or production schedules to manufacture repetitively in each production area.

Use production IDs if:

- Your company plans to perform completions at intermediate operations to track material and labor and machine usage.
- Any operation on the item's routing is going to be performed by a subcontractor.

Selecting the Component Issue Method for Each Item

When defining production areas, determine how you want to issue components to production for each item. PeopleSoft Manufacturing provides you with these component issue methods:

- Issue
- Kit
- Replenish
- Component's Issue Method

Issue Method

With this method, use picking plans to translate requested stock into material picking instructions for stockroom processing. Once the material has been pulled and the picking plan is confirmed, the system decrements the picked quantities from the quantity available at the stockroom location and issues it to the WIP location. PeopleSoft Manufacturing supports PUSH and PULL picking methods.

PUSH picking plan

The system determines the locations from which to pick each item and creates a hard reservation for this item when you generate the pick list. A hard reservation reserves the item in a specific location. Once a hard reservation exists, the item is unavailable for other inventory transactions.

PULL picking plan

The system suggests locations from which the stockroom personnel can pull the items. The stockroom personnel then enters the actual location information. When using the PULL method, PeopleSoft Manufacturing does not make a hard reservation at the time the picking plan is generated. Also, the system does not block items from inclusion in other inventory pick lists until after the picking plan is reviewed and confirmed.

Kit Method

Use this method to issue material directly to a production ID rather than to the WIP location, thus preventing other orders from using your material. The kitted material is charged to the production order upon material release, rather than backflushed when an operation or order is completed. The Kit method is the default method for issuing end items for rework and teardown production. The system issues any additional components required for rework or teardown production using the issue method set for each item on the production area and item level. This issue method is generated by default from the Define Business Unit Item - Manufacturing: General page; you can override it on the Production Area - Item Detail page.

Note. The Kit method is valid with production IDs only.

The Kit method relies on PUSH and PULL pick plans as does the Issue method. If a completed end item is used on a higher-level end item and the component is issued using the Kit method, you can route the completed end item directly to the production ID.

Replenish Method

In some instances, you may want only a fixed quantity to sit on the shop floor, especially when space is a constraint. Additionally, there may be some items that don't need to be allocated to specific orders or to a production run. In this case, use the Replenish method. This method assumes that you are stocking components in the WIP storage areas associated with the work center where you use the components. These components are typically stocked to a defined on-hand quantity that you establish. When the quantity on hand for an item falls below its minimum stocking quantity in that location, a Kanban request (if using PeopleSoft Flow Production) or workflow notification is sent indicating that the location must be replenished.

Before you move components into the replenishment locations in the production area:

- Specify the replenishment point for each component that you manage using the Replenish method.
- Specify the issue multiple used to replenish the WIP location.
- Define both of these parameters for each WIP location using the Prdn Replenish Locations - Prdn Replenish Detail page in PeopleSoft Inventory.

If you are using PeopleSoft Flow Production:

- Define other replenishment defaults using the Prdn Replenish Locations - Prdn Replenish Detail page to define how the replenishment is triggered for each WIP location using the WIP Replenishment Mode: Backflush, Kanban Card, or Manual.
- Specify how the replenishment request is communicated with the WIP Replenishment Method: Pull List, Pull Ticket, or Workflow.
- Determine if the material comes from an inventory location, feeder line, or vendor using the WIP Replenishment Source.

If you are using PeopleSoft Flow Production, you can also replenish your WIP locations directly from an inventory location, feeder line, or vendor using Kanban cards or online replenishment requests.

Use Component's Method

To issue some components using one method and others using another method, select Use Component's Method option when defining the component issue method for each production area and item.

To issue the components using any or all of the issue methods for a single end item, select Use Component's Method. When using this method, the system looks at the component's issue method defined at the business unit and item level to determine how to issue the component to the shop floor. Define the default by indicating the issue method for the item using the Item Attributes by Unit - Manufacturing Attributes page.

See Also

Chapter 22, "Issuing Material to Production," Defining Production Replenishment Locations, page 485

PeopleSoft Managing Items 8.8 PeopleBook, "Defining Items," Modifying Item Attributes for the Business Unit

PeopleSoft Flow Production 8.8 PeopleBook, "Understanding the Flow Production Process"

PeopleSoft Flow Production 8.8 PeopleBook, "Setting Up PeopleSoft Flow Production"

Setting Up WIP Accounts for Location Accounting

If you are using location accounting to provide financial visibility based on where your items reside, you must:

- Indicate that location accounting is required for the business unit.
- Define a set of account ChartFields for each storage area including WIP and inventory locations.
- Define production area accounts for regular, rework, and teardown production.

Note. You should indicate that location accounting is required and define a set of account ChartFields when you set up your business units and inventory storage areas.

To use location accounting, define a set of account ChartFields such as account, operating unit, department, product, project ID for each storage area and production area. These are the accounts that the accounting line generation process debits or credits for material movement, earned conversion costs, and variance transactions. This tables lists some examples:

Transaction	System Debits	System Credits
Issue material to production	WIP storage area or location account	Inventory storage area or location from which material is issued
Backflushing of an item in the production area	Production area account for all material consumption	WIP storage area or location account
Kit item issued to production	Production area account	Material storage area account
Accounting for earned labor, machine costs, and applied overhead	Production area account	Earned labor or applied overhead accounts when you set up the account distribution
End items completed to stock	Account associated with the storage area where the completed items are sent	Production area account

The ChartField functionality provides the necessary features to write debit and credit transactions to the appropriate accounts depending on the type of production taking place.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Structuring Inventory,” Defining and Maintaining Storage Locations

PeopleSoft Managing Costs 8.8 PeopleBook, “Structuring Your Cost Management System”

PeopleSoft Supply Planning Considerations

If you are using PeopleSoft Supply Planning, the system uses production area information to determine whether the item should be manufactured using production IDs or production schedules. When determining where the order should be produced, the system looks first for a production area that manufactures the item using the selected BOM and routing combination.

If there are multiple production areas defined for the BOM, routing, and item combinations, the system assigns the planned order based on the item's *primary* production area. Set the primary production area on the Primary Production Area page.

If no production areas have been defined for the BOM, routing, and item combination, the default is the production area as defined on the Define Business Unit Item - Manufacturing page.

See Also

Chapter 17, "Setting Up Production Areas," Selecting the Primary Production Area, page 365

Prerequisites

Before you define production areas:

- All WIP locations that you plan to use as production area default WIP locations must be defined as WIP locations using the Storage Areas page in PeopleSoft Inventory.

Define WIP accounts for each production type (*Production, Rework, or Teardown*) that you plan to perform in the production area.

Note. If you plan to use consigned items as components, define both owned and non-owned WIP locations. Consigned items are stored in non-owned WIP locations until they are consumed. Once consumed, if they are returned to stock, they're returned to an owned location.

- The items that you manufacture must be defined as approved, owned, and standard-costed manufacturing items in PeopleSoft Inventory.
- All applicable transaction accounts and ChartFields must be defined.
- Optionally define valid production options with the Production Option Maintenance components if you're producing co-products and by-products.

See Also

PeopleSoft Inventory 8.8 PeopleBook, "Structuring Inventory," Defining and Maintaining Storage Locations

PeopleSoft Managing Items 8.8 PeopleBook, "Defining Items"

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "Defining and Using ChartFields"

Chapter 15, "Defining Production Options," page 313

Common Elements Used in This Chapter

Production Area

Area where the end item was manufactured.

WIP Location (owned and non-owned)	The default storage locations for a production area where material is issued or from where material is consumed.
Item	End item being manufactured.
Eff Date (effective date) and Obs Date (obsolete date)	Dates represent the effectivity of the BOM and routing combination set up in the Production Option Maintenance component.
Rate Qty per Shift (production rate quantity per shift)	Default for the daily shift quantity when you are maintaining production schedules.



Click the Item Search button to access links to various other pages such as:

- Item Search: To select a different item.
- Production Option Selection: To select a specific production option to be used to manufacture an item.
- Primary Production Area: To designate a primary production area where the item is typically manufactured.
- Component/Output Mix Inquiry: To view input and outputs by operation sequence for the item.
- BOM Maintenance: To modify the BOM information for an item.
- Routing Maintenance: To modify the routing information for an item.

Defining Production Areas

To define and maintain production areas, use the Production Area Maintenance component (SF_PRDN_AREA).

This section discusses how to:

- Define general information about the production area.
- Select the primary production area.
- Define production area accounts.
- Define production area and item detail.
- Delete production area and item combinations.

Note. The system defines production areas at the business unit level.

Pages Used to Define Production Areas

Page Name	Object Name	Navigation	Usage
Summary - Summary	SF_PRDN_AREA_SUM	Production Control, Define Production, Production IDs/Schedules, Production Area, Summary	Define and maintain general information for each production area, indicate default WIP locations, and identify items to be manufactured within a production area. Note. You receive a message if the range of items for the production area exceeds the default of 100.
Select Primary Production Area for this Item	SF_PRDNAREA_SEL_SP	Production Control, Define Production, Production IDs/Schedules, Production Area, Summary Click the Item Search button and click the Primary Production Area link.	Select the default location where the production item will typically be manufactured.
Production Text	SF_PRDN_AREA_HD_TX	Production Control, Define Production, Production IDs/Schedules, Production Area, Production Text	Associate text with any production area.
Production Area Accounts	SF_PRAREA_ACCT	Production Control, Define Production, Production IDs/Schedules, Production Area, Accounts	Define WIP accounts for production areas.
Item Detail - Detail	SF_PRDN_AREA_ITEM	Production Control, Define Production, Production IDs/Schedules, Production Area, Item Detail, Detail	Define production details for each item associated with a production area.
Area Maintenance - Item Detail - Item Text	SF_PRDN_AREA_IT_TX	Production Control, Define Production, Production IDs/Schedules, Production Area, Item Detail, Item Text	Attach production area and item text relating to specific items that are manufactured within a production area.
Production Areas for an Item (inquiry)	SF_PRDN_ITEM_INQ	Production Control, Define Production, Review Production Information, Production Areas for an Item	View all production areas in which an item is manufactured.
Production Text for Area/Item (inquiry)	SF_PRDN_ID_TX_INQ	Production Control, Define Production, Review Production Information, Production Areas for an Item, Production Text for Area/Item	View the text associated with the production area and item.

Defining Production Area Summaries

Access the Summary - Summary page.

SummaryAccountsItem Detail

SummaryProduction Text

Unit:US008

Production Area:FINALDescription:

*AreaLevel 1:Level 2:Level 3:Level 4:

WIP Location Owned:FAAIS1ROW1

WIP Location Non-Owned:NOWNBIN

Area Maintenance Summary

CustomizeFindView All1-2 of 7FirstLast

EffectivityOther

	*Item	Description	BOM	Routing	Eff Date	Obs Date		
	MT2000	Professional Road Bike, Womans	1	1	01/01/1900	12/31/2099	+	-
	MT3000	Mountain Bike, Womans	1	1	01/01/1900	12/31/2099	+	-

Summary - Summary page: Effectivity tab

WIP Location Owned and Non-Owned

Enter values for the production area. If you are producing items that include non-owned components, for example, you are the subcontractor and your customer is supplying the components, define a non-owned WIP location in addition to the owned WIP location. Additionally, if you receive items that are consigned to you by your suppliers, they must be stocked in a non-owned location until they are consumed in production.

Note. All consigned items are set up as non-owned. However, consigned manufactured items must be moved to owned WIP locations during the completions process.

If you are exclusively using owned components in the WIP location, you do not need to identify a non-owned WIP location. Owned inventory can only be issued from and received into an owned inventory location. Likewise, non-owned inventory can only be issued from and received into a non-owned inventory location.

Note. The transfer of consigned inventory from a non-owned location to an owned location results in the recognition of the payment liability.

The owned and non-owned WIP locations for a production area indicate the locations where material should be issued or consumed, if the component's issue method is set to *Issue* or *Replenish* and any of these conditions exist:

- No routing exists for the item.
- An invalid WIP location is associated with any work center on the item's routing.

- The operation sequence on any of the item's components is zero or nonexistent.

Storage Area

The system displays the number of storage levels in the Area, Level 1, Level 2, Level 3, and Level 4 fields that have been defined for each storage area.

Effectivity Tab

Select the Effectivity tab.

Item

Select an item. You can associate one or more items with each production area. You can specify any approved item, except floor stock, planning, and expensed items.

Note. When adding an end item with an item status of *Hold* or *Discontinue*, you receive a warning message.



Click the Detail button to access the Item Detail page.

BOM and Routing

Enter values for these fields.

If you are maintaining production IDs, you can associate BOM and routing code combinations, along with their effectivity dates, with the production area and item combination. This is the default that appears when manually adding a production ID for the area and item combination. Change the BOM or routing code to manufacture the item using an alternate BOM or routing.

If you're maintaining production schedules, the BOM and routing codes that you define are the BOMs and routings used to manufacture the item in the production area and cannot be changed on the individual production schedules.

If the BOM and routing combinations for the item have been defined using the Production Option Maintenance component:

- You can select from those predefined production options which can have effective-dated combinations.
- You can assign the combinations to production areas in the Production Option Maintenance component.

Note. If you have not used the Production Option Maintenance component to define the combinations for the item, you can select from any valid BOM or routing combination, but you won't be able to assign effective dates.

There's a difference between using BOM and routing combinations when maintaining production IDs and using them when maintaining production schedules. The BOM and routing area combination for production IDs is really a default combination, depending on the effective date, but it can be overridden manually.

For production schedules, the BOM and routing and area combination is the combination that is actually used on that schedule. It is based on

the business unit and item production area for which the schedule was created. You cannot override the BOM and routing area combination if you are using production schedules.

Both production IDs and production schedules use BOM and routing area combination effective dates if they are defined.

The routing indicates whether this is the primary routing (routing code 1) or alternate routing (routing codes 2 through 99). You can leave this field blank or select a predefined BOM and routing for the item. The routing that you specify should designate the routing used to manufacture the item in this production area. If a primary routing exists for this item, the system automatically provides this routing as a default.

Note. Routing codes cannot be entered for expensed or planning items.

When defining a routing code for the item, the system verifies the item's planning attributes to determine whether the item is scheduled using the item's routing or a fixed and variable lead time.

When a lead time is used, the system issues a warning that the routing code specified will be ignored for planning and scheduling purposes.

When a routing is used for scheduling and one is not specified with the item, the system issues a warning that the item cannot be scheduled.

If you have selected the Valid Production Options only check box in the Production Option Control group box on the Define Business Unit Item - Manufacturing page in PeopleSoft Inventory, you can only define BOM and routing combinations set up in the Production Option Maintenance component.

Note. Associate a production area to a production option.

Eff Date (effective date)

This field is available if you have the same BOM and routing combination with multiple effective dates (such as seasonal changes for multiple years).

Note. There can be only *one* valid BOM and routing combination effective for an item per production area for a specific time period. However, you can create multiple combinations providing the effectivity dates do not overlap.

Other Tab

Select the Other tab.

Revision

Select the revision for the item if the item is revision-controlled and you want to manufacture a specific configuration of the item. This revision becomes the default when adding production IDs or production schedules. The revision defined on the production ID or production schedule determines the BOM used when producing the item.

When you leave this field blank and no revision is specified on the production ID or the production schedule, the system uses the due date of

the production to determine which BOM to use to produce the item. If the item's effectivity is not revision-controlled, this field is unavailable.

Maintain PID (maintain production ID)

Select if:

- You are planning to maintain production IDs for this item.
- Incremental backflushing or completions are going to be performed.
- Count points have been defined on the item's routing.
- A subcontractor is to perform an operation on the item's routing.

Primary

If this production area is the item's primary production area, this check box is selected and unavailable. Select the primary production area on the Area Maintenance - Summary: Primary Production Area page.

Rate Qty per Shift
(production rate quantity per shift)

Use this field only for production schedules. It is unavailable if the Maintain PID check box is selected.

See Also

[Chapter 15, “Defining Production Options,” page 313](#)

[Chapter 8, “Maintaining Bills of Material,” page 147](#)

PeopleSoft Engineering 8.8 PeopleBook, “Maintaining Engineering Bills of Material”

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining Manufacturing Information for an Item

[Chapter 13, “Maintaining Tasks,” page 269](#)

PeopleSoft Product Configurator 8.8 PeopleBook, “Using PeopleSoft Product Configurator,” Establishing Configured Production Costs

Selecting the Primary Production Area

Access the Select Primary Production Area for this Item page.

Select Primary Production Area for this Item

Production Areas							Customize	Find	View All		First	1-2 of 2	Last
Primary Prdn Area	Area	Item	BOM Code	Routing	Eff Date	Obsolete Date							
☒	FINAL	MT2000	1	1	01/01/1900	12/31/2099							
☐	REWORK	MT2000	1	1	01/01/1900	12/31/2099							

Select Primary Production Area for this Item page

The primary production option identifies the primary production area for a specific BOM and routing code combination. This occurs because PeopleSoft Supply Planning allows you to plan for multiple BOM and routing code combinations. This primary production area option enables PeopleSoft Supply Planning to determine the production area that the production ID or production schedule to be manufactured.

This example illustrates how this works:

Production Area	BOM Code	Routing Code	Primary Production Area?
AREA1	1	1	Yes
AREA2	1	1	No
AREA3	2	2	Yes
AREA4	2	2	No

Using this example, if PeopleSoft Supply Planning generates one supply record (such as a production ID) with a BOM and Routing code equal to 1 and one with a BOM and routing code equal to 2, then the system would use AREA1 for the first supply record, and AREA2 for the second supply record.

Note. Because primary production areas are defined at the BOM and routing combination level and these combinations can be effective-dated, the production area is the primary production area only for the dates specified on the combination.

Primary Prdn Area

(primary production area)

If you enter the page and the correct primary production area is selected, then click the Cancel button to return to the Area Maintenance - Summary page.

To change the primary production area, select the check box next to the production area that you want to designate as the primary location where this item is manufactured. When you click OK, the system accepts your changes.

Defining Production Area Accounts

Access the Production Area Accounts page.

ChartFields that you define on this page are used as the debit or credit accounts when material is received or issued from the production ID or production schedule assigned to the production area. The accounts that you assign here track in-process inventory.

Important! First define ChartFields under Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Define Values before you can associate accounts to your production area.

Location Accounting Required

To use location accounting, select the Location Accounting option when defining options on the PeopleSoft Inventory Options page.

Production Type

Select to define ChartFields. You can define a set of accounts for production, rework, and teardown production.

Cost Element	To define production area ChartFields, enter a different ChartField for each element of an item’s cost, apply a single ChartField to all cost elements, or enter a combination of the two. For example, if item A has a material cost element of 100 and item B has a material cost element of 101, define ChartFields on this page for both cost elements. If you want to use the same ChartField, regardless of the cost element, leave the field blank.
Cost Element, Account, Alternate Account, Operating Unit, Fund Code, Department, Program Code, Class Field, Budget Reference, Product, Project, Affiliate, Fund Affiliate, and Statistics Code	The ChartFields appropriate for this production area. When you create accounting entries, the system debits the ChartFields specified here for any material consumption, kit issues, earned labor, applied overhead, or favorable variances, and credits the ChartFields for any end item completions to stock or to another production area, end item scrap, or unfavorable variances. Enter a value if you want the transaction quantity incorporated as part of your accounting information. Note. If you have the Combo Edit (combination edit) option set on the PeopleSoft Inventory Business Unit Options page, the system performs ChartField combination edits that you enter on this page.
Save	The system verifies that the ChartField combinations are valid. If the ChartField combinations that you enter are valid, the system accepts the entry. If the ChartField combinations that you enter are not valid, the system displays a message giving you a count of the ChartField combinations that are in error, with a check mark next to them. You can correct the combinations before you proceed.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Preparing to Implement PeopleSoft Inventory,” Setting Up Location Accounting

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “Editing ChartField Combinations”

Defining Production Area and Item Detail

Access the Item Detail - Detail page.

Summary Accounts **Item Detail**

Detail Item Text

Unit: US008

Production Area: FINAL **Description:**

***Area** **Level 1:** **Level 2:** **Level 3:** **Level 4:**

WIP Location Owned: **WIP Location Non-Owned:**

Area Maintenance Detail Find | View All First 1 of 7 Last

***Item:** **Rtg Itm:**

Professional Road Bike, Womens

BOM: **Routing:** **Eff Date:** **Obs Date:**

Revision: **Rate Qty per Shift:** **EA** **Source Cd:** **Prdn Opt Cntl:**

Component Issue Method

☒ Issue ☐ Kit ☐ Replenish

☐ Use Component's Method

Status

☒ Active ☐ Inactive

☒ Maintain Production IDs

☒ Primary Prdn Area

Item Detail - Detail page

Area Maintenance Detail

Item

Appears for each production ID or production schedule. The item cannot be changed or deleted once a production ID or production schedule has been created for the item.

Rtg Itm (routing item)

Displays the routing used to manufacture this item. The end item may have its own routing or reference another item's routing for its manufacturing methods. The referenced routing can be assigned directly to the end item, its item group, or its item family.

Owned and Non-Owned WIP Locations, BOM, and Routing codes

You can change the values for these fields.

Rate Qty per Shift

(production rate quantity per shift)

Whether you can enter a whole number or a decimal in this field depends on the item's unit of measure and quantity precision combination defined in PeopleSoft Inventory.

Source Cd (source code)

Displays the value for the assembly item. Only items with a source code of *Make* or *Buy* can be assigned to a production area.

Prdn Opt Cntl (production option control)

Displays the value that indicates whether the item has been defined as using production options with the Item Attributes by Unit - Manufacturing page.

Component Issue Method

Indicates how the end item's components are issued for production.

See [Chapter 17, "Setting Up Production Areas," Selecting the Component Issue Method for Each Item, page 356.](#)

Note. The component issue method can be different in each production area for the same item.

Status	Select Active or Inactive. If you select Inactive, then new production IDs or production schedules cannot be defined for the production area or item. However, you can maintain any production that you’ve previously defined, and track any existing production in process until it’s completed and closed.
Maintain Production IDs	Clear this check box if there is no existing production for this item, and if you want to change from maintaining production IDs to maintaining production schedules.
Primary Prdn Area (primary production area)	The check box is selected and unavailable if this is the item’s primary production area. Select the primary production area on the Primary Production Area page accessed through the Area Maintenance- Summary page.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items,” Establishing Quantity Precision and Rounding Rules for Items

Chapter 14, “Structuring Routings,” Defining and Viewing Master Routings, page 298

Chapter 17, “Setting Up Production Areas,” Selecting the Primary Production Area, page 365

Deleting Production Area and Item Combinations

You can delete an existing production area and item combination only if there are no production IDs or production schedules for that production area or item.

You can archive and purge production IDs and production schedules by using the Production Data Archiving process.

See Chapter 27, “Archiving and Purging Production Data,” page 623.

CHAPTER 18

Maintaining Production Orders and Production Schedules

This chapter provides an overview of production orders (IDs) and production schedules, and discusses how to:

- Define and maintain production IDs.
- Generate production ID splits.
- Define and maintain production schedules.
- View production transaction history.
- Reschedule production.

Understanding Production IDs and Production Schedules

PeopleSoft Manufacturing's flexible model enables you to define, maintain, and track production by discrete batches or by production schedules. Production identifiers (IDs) can be used when it's necessary to track information using discrete orders or batches. Production schedules can be used when you want to manage production by day or shift. Alternatively, you can simply backflush an item within a production area even though a schedule hasn't been previously established, and the system automatically creates the supporting production schedule for you.

You can also use production IDs to create rework orders to track material, machine, and labor costs associated with the rework production. Teardown orders use production IDs to track costs associated with tearing down an end item into its component parts.

When you defined the production areas for your manufacturing items, you indicated whether you wanted to track production at a detailed level using production IDs, or at a summary level using production schedules. Production IDs also enable you to report intermediate completions at various operations in an item's manufacturing process. In addition, production IDs enable you to set up any operation on the item's routing as a subcontracted operation.

If you use production schedules, create multiple schedule quantities per shift. You enter quantities for each day of the week and the system determines the start date when the production schedule is added, allowing you to sequence production throughout the day.

If you are using PeopleSoft Supply Planning, you'll generate production ID and production schedule recommendations for regular production when you create your plan and schedule production. PeopleSoft Supply Planning sends recommendations to PeopleSoft Manufacturing in the form of messages.

You can accept and process recommendations (planning messages) to add new production or apply changes to existing production. The planning messages that recommend changes to existing production include:

Schedule changes	PeopleSoft Supply Planning recommends a scheduling change when start and end times are changed, when production calendars change, or when work centers or resources are no longer available for the originally scheduled production times.
Cancellation recommendations	PeopleSoft Supply Planning recommends cancellation when it finds that the specified production is no longer needed because the demand for this order or scheduled quantity no longer exists.

Important! PeopleSoft Supply Planning doesn't recommend creating rework or teardown production. Create rework and teardown production IDs manually using PeopleSoft Manufacturing.

Before you create production IDs and production schedules, you need to determine the type of production. In these sections, we review production types and provide an overview of the production creation process, from generating planned production to scheduling production IDs and production schedules.

See Also

Committing PeopleSoft Supply Chain Planning Updates 8.8 PeopleBook

Chapter 23, "Completing Operations and Recording Scrap," page 521

Production Types

In addition to manufacturing items, there are times when you need to perform additional work on a completed end item after it has already been moved out of production and into stock. You may need to do this to correct a defect in the end item, convert the end item to a different end item, implement an engineering change, tear down an end item into its component parts, or for any purpose other than the normal build of an end item from its production bill of material (BOM).

PeopleSoft Manufacturing provides three production types:

Production	Use this type for regular manufacturing. The system uses the production BOM to determine the material that needs to be issued and consumed. The BOM is also used as the basis for valuation and for calculating cost variances. In addition, the system also uses the specified production routing for the end item to determine the operations necessary to manufacture the end item.
Rework	Use this type when you need to do additional or repair work on a completed end item. In this case, the system can use a rework BOM to issue and consume material when you have a standard rework process that requires additional components. Whether or not you have a rework BOM, the system automatically adds the end item being reworked to the component list when you release the rework production ID. The system automatically applies the Kit issue method to the end item being reworked when the component list is created. You can add other components to the component list as needed to repair or rework the end item, and the system uses the issue method set at the production area/item level for each component. This issue method defaults from the Define Business Unit Item - Manufacturing page and can be overridden on the Production Area - Item Detail page.

You can't use multiple outputs with rework production; the output list only includes the reworked item as the end item. In addition, you can create a rework routing for standard rework processes with common operations. When a rework routing has been defined and then selected for the rework production ID, an operation list is automatically created. Because the use of an operation list is optional for rework production, you can also manually create and maintain an operation list as needed to repair or rework the end item.

You can change the production type from *Production* to *Rework*, or from *Rework* to *Production*, if the status is *Firmed*. If it's in the *Released* status, you can change the production type as long as subcontracted purchase orders haven't been generated against the production ID.

If you are changing the production type to *Rework* in the *Released* status, the system automatically adds the end item to be reworked to the component list with the kit issue method. Either select a rework BOM code or modify the component list by manually adding any additional items that you need for rework above and beyond the end item. You can select a rework routing code.

If you are changing the production type to *Production*, you'll be prompted to create a new component list. PeopleSoft Manufacturing then builds a new component list and operation list automatically.

Material consumed and labor and machine time expended for rework are highly visible on production reports and inquiries.

Note. PeopleSoft Manufacturing uses only production IDs for rework production.

Teardown

Use this type when you need to break an end item down into its component parts and return the components back to inventory. The system doesn't use a BOM for teardown production, but issues the completed end item as the component. You designate the component parts that result from tearing down the end item as teardown outputs on the output list. You can use either of these methods to create teardown production IDs:

- Base a teardown production ID on an existing production ID so that the original configuration can be retrieved and torn down.
- Specify teardown components on a production BOM and a teardown routing so that you can set up a default configuration and teardown steps in advance if no existing production ID is available.

If a production ID isn't selected, the output list is based on the components designated as teardown components on the item's production BOM. The operation list is always based on the teardown routing if one is defined and selected.

You can change the Production Type from *Production* to *Teardown*, or from *Teardown* to *Production*, if the status is *Firmed*. If you are changing from *Teardown* to *Rework* in the *Released* status, you can either select a rework BOM code or rebuild the component list by adding any additional items that you need above and beyond the end item. You can also select a rework routing code.

If you are changing from *Teardown* to *Production*, create a new component list. In this case, the item's regular BOM is used.

Note. PeopleSoft Manufacturing uses only production IDs for teardown production.

Production Statuses

Every production ID and production schedule has a status, indicating where the production ID or production schedule is in the production cycle. These statuses are used throughout PeopleSoft Manufacturing.

Entered

The system recognizes a production ID's quantity, start date, and due date, but the order has no operation list or component list. In addition, the system creates a display-only output list for *Entered* production. If production is for a single output item, an output list is generated with the end item listed as the primary item.

You can:

- Change the production order's status from *Entered* to *Firmed* or *Released* using the Production ID maintenance components or the Production ID or Production Schedule Status Change pages.
- Record end item completions and scrap for *Entered* orders if you release production using the Record Completions/Scrap component.
- Set at the business unit level to release production IDs automatically, to prompt you when releasing production IDs, or not to release production IDs automatically.

Firmed

A *Firmed* production ID or production schedule has a quantity, start date, and due date, but the BOM and routing are frozen and the component and operation lists exist. In addition, the output list also exists and can be changed. You can't generate a picking plan for a *Firmed* order.

You can:

- Change the production status from *Firmed* to *Released* using either the Production ID or Production Schedule Maintenance components or the Production ID or Production Schedule Status Change pages.
- Change the order from *Firmed* to *Entered* using the same pages. Record end item completions and scrap for *Firmed* orders if you release production using the Record Completions/Scrap component.
- Set at the business unit level to release production IDs automatically, to prompt you when releasing production IDs, or not to release production IDs automatically.

If you increase or decrease the production start or production end quantity, the system recalculates the component requirements accordingly. If the production ID or production schedule contains multiple outputs such as primary items, co-products and by-products, the system also recalculates new output quantities.

In addition, if you're using operation yield, the system then readjusts starting or ending quantities for single output and multiple output production.

You may enter either a new start quantity or a new end quantity, but not both.

If a new routing code or revision is specified or the due date of production is changed, you can recreate the component and operation lists based on the new information associated with the production ID.

If a rework production ID is added and a rework BOM and routing have been defined, the routing is copied to create an operation list. Additionally, the item to be reworked is added automatically to the component list with the issue method of Kit. An output list is created with the rework item as the primary output.

If a teardown production ID is added, a component list is created with the teardown item as the component. The system assigns the Kit issue method to the item to be torn down. If there are any additional components, the system issues them using the issue method set for each item on the production area and item level. If you have previously defined a teardown routing, it is copied to create an operation list. An output list is created based on either the component list of another production ID or the teardown components designated on the item's production BOM.

Released

In the *Released* status, the production has a component list, an operation list, and an output; all of which can be modified. Additionally, each operation's start date, due date, and time are determined. Once released, changing a production ID can result in the deletion of the existing component list and operation list. The lists are then re-added, based on the new information associated with the production ID.

If you increase or decrease the production start or production end quantity, the system recalculates the component requirements accordingly. If the production ID or production schedule contains multiple outputs (primary items, co-products and by-products), the system recalculates new output quantities.

For rework production IDs, the system creates a component list with the reworked end item as a component. The scheduled quantity is the same as the production ID quantity.

If you have created a rework BOM for the item, the system copies that to the component list as well. If additional material is needed to complete the rework, you can manually add the items to the component list. The system issues the additional components using the issue method set for each item at the production area and item level.

If you have created a rework routing, the system copies it to the operation list. If there is no rework routing, the system won't create an operation list for rework production, but you can manually create one. An output list is created with the rework item as the only output.

You can:

- Generate a picking plan.
- Record completions and scrap.
- Modify the production start or production end quantity.
- Add or change by-products for production.
- Change the status from *Released* to *Firmed* or *Entered* except for a production ID with subcontracted operations if a purchase order has been generated against the production ID.

In Process

When you have recorded production transactions such as issuing or consuming components and recording completions, scrap, or actual hours, the system automatically changes the production status to *In Process*. You can only change the text, the scheduling method, production quantity, and the production ID's start or due date and time, depending on the scheduling method.

You can modify the production start quantity or production end quantity for a production ID or production schedule in the *In Process* status after production has been started.

- If you increase or decrease the production start or production end quantity, the system recalculates the component requirements accordingly.

If the production ID or production schedule contains multiple outputs (primary items, co-products and by-products), the system recalculates new output quantities.

- If you decrease the production start or production end quantity, the system verifies that you aren't decreasing the order quantity to less than what has already been reported as completed or scrapped.

You receive warning messages if components have been over-issued or over-consumed based on the new order quantity.

In either case, the system adjusts the component scheduled quantities to reflect the new order quantity and marks the production ID as changed so that PeopleSoft Supply Planning reschedules the operations during the next planning run.

You can also:

- Generate production ID splits for production IDs with a status of *In Process*.
- Change *In Process* orders back to *Released* or another prior status if any completion quantities (at an operation or to stock) have been completely reversed.

To do this, you must reverse all end item completions and scrap, return components to stock, and reverse all actual hour recordings to correct completions or actual hours errors that have been reported against a particular production ID.

You cannot modify operation yields once the order is in process.

Note. You cannot change the production quantity if the production ID has a subcontracted operation and you've generated a purchase order for the ID.

Pending Complete

The *Pending Complete* status indicates that the scheduled production start or production end quantity has been completed or production for the day and shift has been completed, and you have selected the Production Completed check box on the Complete Production page in the Record Completions/Scrap component.

Complete

To change production to the *Complete* status, the scheduled quantity must be finished and you must have run the Close Production process to close the production ID or production schedule to any material movement. After an order is in the *Complete* status, you cannot record any operation or end item completions or any additional component consumption or scrap.

Note. Production must be in the *In Process* or *Pending Complete* status before you can change it to *Complete*.

Closed for Labor

The system sets the *Closed for Labor* status when you run the Close Production process to close the production ID or production schedule to any additional actual labor or machine hour recording. You can change the production status *Closed for Labor* from *In Process*, *Pending Complete*, or *Complete*.

Closed for Accounting

When you run the Close Production process to accounting, the system sets the production status to *Closed for Accounting*, which closes the production ID to all transactions and records the variances associated with production.

Canceled

The *Canceled status* cancels existing production quantities associated with a production ID. You can cancel production if the production status is *Entered*, *Firmed* or *Released*. You cannot cancel a production ID with subcontracted operations if a purchase order has been generated against the production ID.

See Also

[Chapter 3, “Defining Your Business Unit Structure,” Setting Up Manufacturing Business Unit Options, page 34](#)

[Chapter 21, “Releasing Production and Changing Production Statuses,” page 471](#)

[Chapter 23, “Completing Operations and Recording Scrap,” page 521](#)

[Chapter 26, “Closing Production,” page 615](#)

Production Status Changes

When the status on the production ID or production schedule is changed, these actions occur:

Status	Action
Entered (New Order)	Creates a header record, but an operation list or component list isn't created. In addition, a display-only output list is created.
Entered to Firmed	Creates frozen operation and component list.
Entered to Released	Creates operation and component list.
Firmed (New Order)	Creates header, operation list, and component list.
Firmed to Released	Status change only.
Firmed to Entered	Deletes operation list and component list.
Released (New Order)	Creates header, operation list, and component list.
Released to Entered	Deletes operation list and component list.
Released to Firmed	Status change only.

Rework Production

Rework production works in a manner similar to regular production, but with several exceptions. Add rework production IDs for current production in the *Released* status. The system automatically creates the component list using the rework BOM for rework production IDs, and copies the end item to be reworked to the component list. The system assigns the Kit issue method to the end item to be reworked when the component list is created and uses the issue method set at the production area/item level for each additional component. This issue method is set by default from the Define Business Unit Item - Manufacturing page and can be overridden on the Production Area - Item Detail page. If the item has a rework routing defined, the system copies the routing to the operation list. Create rework production IDs with *Firmed* statuses for production scheduled for future dates. The system creates frozen rework component lists and operation lists.

Teardown Production

You can't create teardown production IDs in the *Entered* status; you must create them with a status of *Firmed* or *Released*. The system assigns the Kit issue method to the end item to be torn down when the component list is created and uses the issue method set at the production area/item level for each additional component. This issue method is set by default from the Define Business Unit Item - Manufacturing page and can be overridden on the Production Area - Item Detail page. The system creates the teardown output list, either by copying the components on the original production ID or by using the teardown components designated on the BOM.

Effect of Serial Genealogy on Rework or Teardown Production

If you're using serial genealogy, the serial association occurs when the assembly item is issued to the production through Kit Issues or the Picking process. You will be prompted to enter the serial ID that is being issued to the rework or teardown production ID.

See Also

[Chapter 21, "Releasing Production and Changing Production Statuses," page 471](#)

Creation of New Production IDs or Production Schedules

Create production IDs or production schedules by:

- Automatically creating production IDs or production schedules based on recommendations generated from PeopleSoft Supply Planning.
- Manually adding production IDs using PeopleSoft Manufacturing pages.
- Manually adding production schedules using PeopleSoft Manufacturing pages.

Note. PeopleSoft recommends that you use PeopleSoft Supply Planning's solvers to manage and schedule your shop floor.

Actual Dates and Production Due Dates

All production IDs and production schedules maintain production date and shift information as well as actual date and time information.

Production date and shift information is defined as the working day and shift (or manufacturing day and shift) during which component and production scheduling may be done. Define your production dates and shifts through the business unit's production calendar or the work center calendars. For example, on the production calendar for the month of March, you specify that you are working three shifts on 3/29/01. You just defined a production date of 3/29/01 with three production shifts: 1, 2, and 3. In this example, shift 1 runs from 7:00 a.m. to 3:30 p.m. When the start date and time or due date and time is determined, the time is converted to the appropriate shift. In this example, a start time of 2:00 p.m. would equate to shift 1.

Actual date and time is defined as the actual date and time the production is scheduled to begin or end based on the standard calendar. In most cases, your production dates and actual dates are the same. If you have production shifts that span multiple standard calendar dates, your actual date for production may be different than the production date. The system determines your actual date by the actual time that your production is scheduled to start or end within the production shift and the operation start quantity.

These examples explain and illustrate the differences between how PeopleSoft Manufacturing determines production date and shift information as well as actual date and time information when a shift:

- Begins and ends on the same calendar date.
- Spans multiple calendar dates.

When a Shift Begins and Ends on the Same Standard Calendar Date

Suppose that a company runs seven days a week with one shift that starts at 7:00 a.m. and ends at 4:00 p.m. A production schedule can now be defined for a production due date and due shift. In the example, the actual due date is 3/25/03 and the due time is 3:30 p.m. Because this shift doesn't span multiple standard calendar dates, the production due date and shift for the production is 3/25/03, shift 1.

When a Shift Spans Multiple Calendar Dates

For shifts that span multiple dates, define whether the start time or end time of the shift is associated with the manufacturing production dates. Define this option when setting up your shift codes using the Shift Codes page. Associate this shift code to a manufacturing production date and shift when maintaining production or work center calendars.

Based on whether you want the start time or end time of the shift to be associated with the manufacturing production date, the system first determines the actual date and time information and then the production date and shift information. These examples illustrate how the system determines the production date and shift based on whether you want the start time or end time of the shift to be associated with the manufacturing production date.

Example 1 - Production Date Time Set to Start Time

Suppose that a company runs three shifts where the third shift starts at 8:00 p.m. and ends at 2:00 a.m. This shift is defined with the start time associated with the production date. A production schedule can now be defined for a production due date and due shift. In our example, production is due to complete on 3/26/03 at 1:30 a.m. Because the shift in which production takes place actually begins on 3/25/03 at 8:00 p.m., the production date and shift is recorded as 3/25/03, shift 3. The actual date and time appears as 3/26/03 at 1:30 a.m.

Example 2 - Production Date Time Set to End Time

Suppose that a company runs three shifts where the first shift starts at 10:00 p.m. and ends at 6:00 a.m. This shift is defined with the end time associated with the production date. A production schedule can now be defined for a production due date and due shift. In our example, production is due to complete on 3/27/03 at 5:30 a.m. Because the shift ends at 6:00 a.m. and the flag indicates the production date is set to the shift's end time, the production due date and shift is 3/27/03, shift 1. The actual due date and time is appears as 3/27/03 at 5:30 a.m.

When defining production IDs, specify the actual date and time information and the system determines the corresponding production date and shift information. When defining production schedules, specify the production date and shift information and the system determines the corresponding actual date and time. For production schedules, you can specify the actual time within the production shift. In this case, the system determines the actual date.

Scheduling Regular Production

For each production ID or production schedule that you create, a scheduling method (forward or backward) is defined either automatically or manually, depending on how the production ID or production schedule is created.

Production IDs and Production Schedules Using PeopleSoft Supply Planning

PeopleSoft Supply Planning's realtime planning engine analyzes supply and demand and determines whether new planned production needs to be generated. If new production is required, the system generates a planning message to recommend creation of a new production ID or production schedule. When a planned manufacturing order is generated within PeopleSoft Supply Planning, it is always backward scheduled based on the required delivery date and the routing or item's lead times to determine the start date of production.

If you are using PeopleSoft Supply Planning's solvers to schedule and reschedule production:

- Freeze production within PeopleSoft Supply Planning and apply this frozen requirement to the production within PeopleSoft Manufacturing.

For example, PeopleSoft Supply Planning sends a planning message for a new production ID back to PeopleSoft Manufacturing with the requirement that production is frozen.

- Using PeopleSoft Manufacturing, convert this recommendation into a production ID with an *Entered*, *Firmed*, or *Released* status.

If you are using the Production ID Maintenance components to change any information on this production ID that impacts scheduling, the system displays a warning message that indicates production is frozen and any of the changes result in rescheduling the production. You have the option of overriding the frozen status by proceeding and changing the information or you can cancel your changes.

Within PeopleSoft Manufacturing, you can manually freeze production. Do this by selecting Frozen Production on the Planning Attribute page for production IDs or by selecting the Frozen check box on the Production by Area Details page for production schedules.

PeopleSoft Supply Planning uses planning lead times or routing times when scheduling production, and takes into account these factors that affect the actual start date and time and actual due date and time of each operation:

- Capacity and material availability.
- Planning labor or machine setup, run, and fixed run times or run rates.

- Operation overlap, based on an overlap percentage or send-ahead quantity.
- Operation intensity, based on machine, labor, cumulative, or longest.
- Operation yield.
- The work center calendar, if one exists.
- The production calendar, if one exists.
- The five-day work week calendar, when no other calendar exists.

Reviewing, Approving, and Applying Production Messages

Once a plan has been created and recommendations are made, planning messages are brought back into the transactional system using the Post Updates (PL_POST) process. Once the messages are received, you can:

- Review and approve the production messages using the Approve Production Updates component.

Use this component to select the messages that you want to review, then look at the production details, status details, and configuration code information to select which messages you want to approve.

- Review any exception messages generated when the production messages are applied using the Review Post Errors component.

Use this component to select the exceptions that you want to review, then look at the exception details, dates and quantities, and configuration code information.

- Apply the production messages to PeopleSoft Manufacturing to take action on the recommendations made by PeopleSoft Supply Planning by using the Apply Production Updates page.

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” Using Planning Attributes, page 401

Committing PeopleSoft Supply Chain Planning Updates 8.8 PeopleBook

Production IDs and Production Schedules Using PeopleSoft Manufacturing

You can use PeopleSoft Manufacturing to create production IDs and production schedules.

Creating Production IDs

You can use the Production ID Maintenance pages to add or maintain a production ID one at a time. When you manually add a production ID, determine whether production is forward or backward scheduled. Your selection is based on whether you know when you want to start production or when the item is due:

- If the production ID is based on the completion date and time, or due date and time, it is *backward* scheduled, and the system calculates the actual start date and time.
- If the production ID is based on the start date, it is *forward* scheduled, and the system determines when the assemblies will be completed.

Automatic calculation of the opposing date and time applies only if you specify a routing for the production ID. In addition, the system calculates the production start date and shift as well as the production due date and shift associated with both the actual start date and time and due date and time.

If a production ID is added in the *Firmed* or *Released* status, the actual start dates and times and due dates and times for each operation in the manufacturing process are also calculated.

You can also add or maintain production ID information one week at a time using the Production by Area pages. This gives you a one-week view of all production taking place in a selected production area. By navigating to the details by day, you can view daily production ID and production schedule information. When adding production IDs, you select the date on which production will be completed and the system automatically backward schedules the production ID to determine the start date of production.

Creating Production Schedules

Production schedules are always entered with a quantity due for a day of the week, and the system determines the production start date and production start shift using backward scheduling.

Note. Since production schedules are always backward scheduled, you'll enter the production *end* quantity and the system calculates the required production start quantity.

When you manually add a production schedule in the *Entered* status, the system:

- Determines the production start date and shift when the production due date and shift is entered.
- Determines the actual start date and time as well as the actual due date and time for the production start date and shift and production due date and shift respectively.

When you add a schedule in the *Firmed* status or release a production schedule, the system must:

- Calculate an actual start date and time or due date and time.
- Calculate actual start dates and times and due dates and times for each operation in the manufacturing process.

How PeopleSoft Manufacturing Calculates Start and Due Dates for Production IDs and Production Schedules

PeopleSoft Manufacturing calculates start and due dates based on the production item's routing and doesn't consider other production utilizing the required work centers or resources. If capacity and material availability are concerns, manually add a production ID or production schedule using PeopleSoft Manufacturing. When you add the production, estimate start and due dates and then schedule the actual start and due dates for the production ID or production schedule using PeopleSoft Supply Planning.

If you are using PeopleSoft Manufacturing to schedule production, there are several factors that affect the actual start date and time and actual due date and time of each operation in addition to the planning lead times:

- Operation overlap, based on a percentage or send-ahead quantity.
- Whether setup can occur during queue time or at any time once production begins.
- Whether or not setup time is included in scheduling the operation.
- Operation intensity.
- The work center calendar, if one exists.
- The production calendar, if one exists.
- The five-day work-week calendar.
- Operation yield.

Define these factors when you set up manufacturing data for each business unit, item, work center, or routing. Once the system creates the operation list for the production ID or production schedule, it reschedules each operation any time that operation list is modified.

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” Production IDs and Production Schedules Using PeopleSoft Supply Planning, page 380

Chapter 28, “Scheduling Operations,” page 627

Production IDs Using PeopleSoft Product Configurator

The production configuration process:

- Takes the detailed configuration information captured in PeopleSoft Order Management and sends requirements to PeopleSoft Manufacturing.

The production configuration rules allow you to dynamically specify component and operation list elements without having to have standard BOMs or routings for each specific configuration.

- Generates configured production IDs, component lists, operation lists, and configured costs.

You can manually create a production ID for a configured item, and create the operation list and component list.

See Also

PeopleSoft Product Configurator 8.8 PeopleBook, “Using PeopleSoft Product Configurator”

Rework and Teardown Production

You can use PeopleSoft Manufacturing to manually create rework and teardown production IDs, or create an operation list:

- Manually create rework and teardown production IDs using PeopleSoft Manufacturing.

The process of creating rework or teardown production IDs is the same as for regular production. However, because the use of an operation list is optional for rework or teardown production, PeopleSoft Manufacturing won't automatically determine the actual start date and time or actual due date and time for rework or teardown production, unless you have previously created a rework or teardown routing which is then copied to the operation list.

- Manually create an operation list if a rework or teardown routing hasn't previously been defined.

If you create an operation list for the rework or teardown production, the tasks and work centers associated with it are used for scheduling. If an operation list doesn't exist, manually enter the scheduling information, indicating the actual start date and time and due date and time for production IDs.

Once the production ID is created:

- Modify the appropriate start and due dates manually.
- If capacity and material availability are concerns and you've created a component list and operation list for the rework or teardown production, schedule the production ID using PeopleSoft Supply Planning.

PeopleSoft Supply Planning considers rework and teardown requirements for a resource in the same manner as regular production.

Note. You can't create rework or teardown production IDs using PeopleSoft Supply Planning. However, you can schedule rework or teardown production IDs to repair capacity restraints using PeopleSoft Supply Planning.

See Also

Chapter 18, "Maintaining Production Orders and Production Schedules," Scheduling Regular Production, page 380

Production ID Splits

Occasionally, situations may arise during the production process that requires you to split a single production ID into two or more production orders. With PeopleSoft Manufacturing, you can split production when:

- A portion of the production quantity needs to be split out because of a change in processing steps.
- A portion of the production quantity must be split due to material shortages or capacity issues. This allows you to complete what you can and close out the order. The remaining quantities requiring material or resources remains on an open order.
- Production variations occur, such as unplanned outputs that need to be completed separately and put away using a different item number.

Perform production ID splits for this type of production orders:

- Production
- Rework
- Teardown

You can:

- Split configured production IDs; however, you can only split the configured order to a new *configured* production ID.
- Split production IDs that have subcontracted operations; however, you must perform the production split before running the Select Subcontract Prdn for PO process (SFS5000). Assign a new item number to the new production order if the final end item produced differs from the original item.
- Manually adjust operation lists for production that hasn't started.

Material, earned conversion costs and actual conversion hours are split across the From and To orders on an operation-by-operation basis. Scrap costs remain with the original production ID.

- Correct and modify the component material split across orders even after the order has been split by using the PID to PID Component Transfers page.
- Split multiple outputs (primary items, co-products, by-products) to the new (To) production ID if there are still remaining quantities.

In addition, the system copies any resources, attachments, text, or documents to the new (To) production ID. The system maintains the split history at the production header level, and you can view the history by using the Production ID Split History inquiry page.

- Make manual changes to the components by using the Production ID Comp Transfer page after a production ID split.

You can't perform production ID splits under these circumstances:

- Production IDs that have subcontracted operations in process can't be split.
- Co-products can't be split to primary items.
- Splits across production types—production to teardown, rework to production, or teardown to rework—aren't allowed.

Note. Production schedules can't be split.

When splitting production IDs being tracked by serial genealogy, you will be prompted for the assembly serial IDs that are being split. These serial IDs will be associated with the new production ID. In addition, the component genealogy associated with the serial assemblies being split will be moved to the new production ID.

Production order splits are permanent, and once they're executed, they can't be rejoined at a later operation. Each production ID becomes a separate entity that must be closed and the costs must be reported independently. If more than two production IDs are required, the split must be run multiple times. When the entire quantity of a production ID is moved to one or more new production IDs, the status of the original production ID is set to Canceled.

Both the original (From) and the new (To) production IDs can be rescheduled in PeopleSoft Supply Planning.

See Also

[Chapter 25, "Subcontracting," Recording Completed Operations and Scrap for Subcontracted Operations, page 603](#)

[Chapter 18, "Maintaining Production Orders and Production Schedules," Generating Production ID Splits, page 406](#)

Frozen Production

If you are maintaining production that was scheduled using PeopleSoft Supply Planning, the production ID may have a frozen status. The frozen status indicates that a decision was made to hold or firm up the due date and that changes to these production IDs or production schedules within PeopleSoft Manufacturing could result in a change to the schedule created by PeopleSoft Supply Planning.

- Set a default at the manufacturing business unit level to create all new rework or teardown orders with a frozen status, indicating that you don't want PeopleSoft Supply Planning to reschedule those orders.
- Override this default using the Planning Attribute page available from the Production ID Maintenance or the Production by Area Details components.
- If the production ID or production schedule has a frozen status and you change information that impacts the actual start or due dates and times, PeopleSoft Manufacturing displays a warning message indicating that the production is frozen.
- You can continue or cancel your changes.

If you proceed with changing the production ID or production schedule, the production ID or production schedule is no longer frozen.

Changes to the production that impact the actual start date and time or actual due date and time include:

- Item ID

- Status
- Production quantity
- Production type
- Actual start date and time
- Actual due date and time
- Production start date and shift
- Production due date and shift
- Routing code
- Operation yield
- Revision

See Also

Chapter 3, “Defining Your Business Unit Structure,” Setting Up Manufacturing Business Unit Options, page 34

Chapter 18, “Maintaining Production Orders and Production Schedules,” Using Planning Attributes, page 401

Manufacturing Execution System Integration

If you’re using PeopleSoft Manufacturing with a Manufacturing Execution System (MES), the system publishes messages for the MES when you add or modify production IDs or production schedules. The system publishes production order messages when you:

- Change the production status of a production ID or production schedule to Released.
- Modify a released production ID or production schedule.
- Change the production status of a production ID or production schedule from Released to an earlier status.
- Change a component list or operation list.
- Change an output list.
- Split a production ID.

When publishing a production order for the MES:

- The system includes the component list and operation list, with attachments and documents, as well as the output list for the production ID or production schedule.
- Release production IDs or production schedules in either PeopleSoft Manufacturing or the MES.
- Perform detailed production scheduling, production monitoring, and reporting in the MES.

See Also

Chapter 5, “Integrating with Third-Party Systems,” page 57

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points”

Prerequisites

Before you create production IDs and production schedules, make sure that:

- Items have been defined in PeopleSoft Inventory.
- BOMs have been created for the assembly item.
- Production areas are defined.
- The items you'll be manufacturing, tearing down, or reworking are linked to a production area using the production Area Maintenance component or the Production Option Maintenance component. The production area/item relationship must have an Active status.
- All items you'll be tracking using production IDs have the MA ID (maintain production IDs) check box selected on the production Area Maintenance Summary page.
- Your production calendar is defined.
- The five-day work week is defined for the business unit if you aren't using production calendars.

Optionally, you can define:

- A primary routing or alternate routing for the items you'll be manufacturing. For reworking assemblies, you can also optionally define rework BOMs or rework routings.
- If you typically tear down finished end items into their component parts, define a teardown routing, defining the operations necessary in the teardown process. Additionally, indicate on the production BOM which components are outputs from a teardown process.
- Any revisions for revision controlled items you'll be manufacturing.
- Any work center calendars.

Common Elements Used in This Chapter

Production ID	The production order identifier.
Prdn Area (production area) and Production Area	The area where the end item is generated.
Item ID	The item being manufactured.
Prdn Start Qty (production start quantity)	The quantity of an end item at the beginning of the manufacturing process. For production IDs, if you enter this quantity, the system calculates the production end quantity, factoring in operational yield.
Prdn End Qty (production end quantity)	The quantity of an end item to be manufactured. For production IDs, if you enter this quantity, the system calculates the production start quantity.

	For production schedules, you enter the production end quantity since all production schedules are backward scheduled and the system calculates the production start quantity.
Expected Prdn Qty (expected production quantity)	The quantity anticipated at the end of the production process. This amount reflects any operation yield.
Production Status	The current status of the production ID.
BOM Code	The BOM priority code used to manufacture the item.
Routing Code	The routing priority code used to manufacture the item.
Component ID	The component identifier.
Sch Method (scheduling method)	Values are: • <i>Forward</i>: System uses the production start date as a basis for creating the schedule for the production ID. This method is used only with production IDs. • <i>Backward</i>: The system uses the production completion date as a basis for creating the schedule for the production ID or production schedule. Production schedules are always backward scheduled.
Start Date/Time and Due Date/Time	The beginning and completion dates and times for the production based on the scheduling method. Forward scheduling uses Start Dates/Times; Backward scheduling uses Due Date/Time.
Revision	Code is indicated if item is revision-controlled.
Production Type	Type of production being manufactured: <i>Production</i> , <i>Rework</i> , or <i>Teardown</i> .
Serial in Prdn (serial in production)	This display-only field indicates if you want to track the key serial and lot components that make up this assembly item. This is defined at the item level using the Inventory - Tracking Description page. See Chapter 16, “Using Serial Genealogy in PeopleSoft Manufacturing,” Defining Items Using Serial Genealogy, page 339.
Prdn Date Option (production date option)	Select one of these values: • All • Prdn Start (production start) • Range • Prdn Due (production due)

Creating Production IDs

The first step in defining a discrete manufacturing order is to create a production ID. Once you’ve generated a production plan, manually enter any discrete production or rework orders for those items that weren’t included in the new production recommendations from PeopleSoft Supply Planning.

When you change any information on an existing production ID, the system optionally sends the Production ID Change workflow notification to selected roles that you defined. These roles could include a planner/buyer or a production control manager.

When you release or modify a released production ID and if you are integrating to a third-party MES, PeopleSoft Manufacturing uses the Production Order Update EIP to publish an asynchronous message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

In addition, you can use the Production Order Sync EIP to synchronize production orders created in PeopleSoft Manufacturing with other third-party systems by using a synchronous publish message.

You can create production IDs for production, rework, or teardown orders.

If you want to automatically create operation and component lists, you must define BOMs and routings for the end item.

This section discusses how to:

- Create and maintain production IDs.
- View production start date/shift and production due date/shift information.
- Locate original production ID used to create teardown item.
- Use planning attributes.
- Display production ID detail.
- Maintain production ID output information.

See Also

PeopleSoft PeopleTools PeopleBook: Workflow

[Chapter 5, “Integrating with Third-Party Systems,” page 57](#)

[Chapter 8, “Maintaining Bills of Material,” page 147](#)

[Chapter 14, “Structuring Routings,” page 281](#)

[Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649](#)

Common Elements Used in This Section

Op Seq (operation sequence)	The operation step in the manufacturing process where the components are required.
Prdn Start Date (production start date)	Date production is or was to have started.
Prdn Due Date (production due date)	Date production is or was due to be completed.
Prdn Due Shift (production due shift)	Shift that the production is or was due to be completed.
Expected Yield	The aggregate yield percentage for the production order when all operation yields are combined.

Source Cd (source code)	Displays the end item source code: <i>Make</i> or <i>Buy</i> .
Task Code and Description	Represents the task code number and description of the task being performed.
Sub (subcontracted operation)	Indicates that the operation step is a subcontracted operation.
Work Center	Indicates which work center the operation step is being performed.
Configuration Code	Displays whether the output or component is a configured item.
Output Qty (output quantity)	Represents the output production quantities based on Per Asy (assembly) or <i>Ord</i> (order).
Per	Can be per Asy (assembly) or <i>Ord</i> (order).
Res % (resource allocation percentage)	Determines how much of the BOM batch quantity the primary and co-product represents. It is used during completions to determine what percentage of the components should be consumed for the primary and co-product. The total resource allocation percentage should always equal 100%.
Qty (quantity)	The component quantity required based on Per assembly or order.
Sched Qty (schedule quantity)	Represents the quantity required for the production start or production end quantity.
Issue Qty (issue quantity)	For components using the Issue or Replenishment material issue method, this is the quantity consumed from the WIP location for the component and is charged to WIP. For components using the Kit method, this is the quantity issued directly to the production ID.
Orig Comp ID (original component ID) and Description	Indicates the original component if the current component is a substitute item.

Pages Used to Define and Maintain Production IDs

Page Name	Object Name	Navigation	Usage
Production ID Maintenance	SF_PRDNID_MAINT	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Select a Production Type.	Create and maintain a single production ID for production, rework, or teardown orders.
Production Start Date/Shift or Production Due Date/Shift	SF_PRDN_DUE_SBP	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the Detail button next to the Start Date/Time or Due Date/Time fields.	Display production start date/shift or production due date/shift information for the selected production ID.

Page Name	Object Name	Navigation	Usage
Production Option Selection	EN_PDO_SEL_SP	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the Production Option Selection button next to the BOM or Routing Code fields.	Select a different BOM/Routing code combination that you want to use for the production ID.
Process/Output Options (optional)	SF_PRNT_OPT_SP	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the Setup Print Options link.	Select your print options for printing production documents at save.
Teardown Original Production ID Search (optional)	SF_TRDN_PID_SEC	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the Search button next to the Original PID field to access this page.	Locate the original production ID used to create the teardown item. This page is used for teardown orders only.
Update Production	PL_PLAN_ATTRIB	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the Planning Attribute link.	Freeze the production ID's component list and operation list in the PeopleSoft Supply Planning system.
Production ID Detail	SF_PRDNID_STATIC	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Detail	View production ID and scheduling data.
Production ID Text	SF_PRDNID_TEXT	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Text	Associate text with any production ID.

Page Name	Object Name	Navigation	Usage
Production ID Outputs	SF_PRDN_OUTPUT	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the View Outputs link. If you're adding a new production ID, the View Outputs link won't be available until after you save the page.	Maintain and display production output information.
Traceability	SF_PRDN_TRC	Click the View Serial Info link on the Production ID Maintenance page.	Note. You can only access this page if the serial IDs have been associated with the production ID. This page displays the assembly serials that have been associated with the production ID. See Chapter 16, "Using Serial Genealogy in PeopleSoft Manufacturing," Reviewing Traceability Information, page 351.
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history.
Production History Details inquiry	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View transaction history details based on your selection criteria.
Production ID Comp Transfers	SF_COMP_TRANSFER	Production Control, Process Production, Split Production, Production ID Comp Transfers, Production ID Comp Transfer	Transfer components between production IDs to cover shortages. Correct errors after a production ID split.
Production Detail	SF_PID_SEC	Click the Detail button next to the Production ID or To Production ID fields on the Production ID Comp Transfer page.	View production details.
Production by Area Summary	SF_PA_SCH_SUMMARY	Production Control, Define Production, Production IDs/Schedules, Production by Area Summary	Add, modify, and view all production for a specific production area.

Page Name	Object Name	Navigation	Usage
Production by Area Details	SF_PA_SCH_DT_MAINT	Production Control, Define Production, Production IDs/Schedules, Production by Area Details	Add, modify, and view production details for all production for a specific production area.
Production by Area (inquiry)	SF_PA_SCH_SUM_INQ	Production Control, Define Production, Review Production Information, Production by Area	View all production in a specific production area. Define at least one production schedule or production ID.
Production Selection	SF_PRDN_ITEM_SEL	Production Control, Define Production, Review Production Information, Production for an Area/Item, Production Selection	Access production, rework, and teardown information for a specific item. View production IDs, production schedules, or a combination of both. Define at least one production ID or production schedule for an item.
Production List	SF_PRDNID_ITEM_VW	Production Control, Define Production, Review Production Information, Production for an Area/Item, Production List	Access production, rework, and teardown information for a specific item. View production IDs, production schedules, or a combination of both. Use this page to see the status of production for a production area at the operation level. Define at least one production ID or production schedule for an item.
Production for an Area/Item - Production Detail	SF_PRDNINQ_STATIC	Production Control, Define Production, Review Production Information, Production for an Item, Production Detail	Display production, rework, or teardown details associated with any production ID displayed on the Production for an Item inquiry page.
Operation Detail	SF_PRDN_DATA_DTL	Production Control, Define Production, Review Production Information, Production for an Area/Item, Operation Detail	View operation list details.
Production Output	SF_PRDID_ITEM_OUT	Production Control, Define Production, Review Production Information, Production for an Area/Item, Production Output	View output information for a specific item. Define at least one production ID for an item.

Page Name	Object Name	Navigation	Usage
Production Text	SF_PRDNINQ_PRTXT	Production Control, Define Production, Review Production Information, Production for an Item, Production Text	View text associated with any production ID.
Production Inquiry - Production Selection	SF_PRDN_SELECTION	Production Control, Define Production, Review Production Information, PID/Schedule, Production Selection	Define production criteria for the production inquiry.
Production Inquiry	SF_PRDN_MAINT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Inquiry	View production information for a particular production ID. Enter production information on the Production Selection page before accessing this page.
Production Detail Inquiry	SF_PRDN_STAT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Detail Inquiry	Display additional details for the selected production.
Production Output	SF_PRDN_OUTPUT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Output	View output information for production IDs.
Production Text Inquiry	SF_PRDN_TEXT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Text Inquiry	Display text associated with the selected production.
Production Output Mix Inquiry - Production Selection	SF_COMP_OUT_SEL	Production Control, Define Production, Review Production Information, Production Output Mix, Production Selection	Enter the search criteria for the production ID whose component and output data you want to display. Define at least one production ID with multiple outputs.
Prdn Op Summary (production operation summary)	SF_COMP_OUT_SUM	Production Control, Define Production, Review Production Information, Production Output Mix, Prdn Op Summary	Display production operation sequence data at a summary level, including task and work center information.
Prdn Output/Component Details	SF_COMP_OUT_DTL	Production Control, Define Production, Review Production Information, Production Output Mix, Prdn Output/Component Details	Display specific production component and output ID production data by operation sequence at a detail level.

Page Name	Object Name	Navigation	Usage
Production Report Selection	RUN_SFS2004	Production Control, Define Production, Reports, Production Report, Production Report Selection	Generate a production report for a range or all actual start dates, selected production statuses, and a range or all production IDs.

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” Maintaining Production ID Output Information, page 403

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2003 - Production Documents, page 672

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2004 - Production Report, page 673

Adding and Maintaining a Single Production ID

Access the Production ID Maintenance page.

Production ID Maintenance				Production ID Detail		Production ID Text	
Unit:		US008		Production Type:		Production	
Production ID:		PRD00226					
*Status:	In Process		View Outputs		☒ Serial in Prdn		☐ Print at Save
*Production Area:	FINAL		View Serial Info		Setup Print Options		
*Item ID:	SR3001		Diablo 500 Touring Bike		Planning Attribute		
Prdn Start Qty:	100.0000	EA	Expected Yield %:	100.0000			
Prdn End Qty:	100.0000	EA	Expected Prdn Qty:	100.0000			
BOM Code:	1	Routing:	1	Rtg Itm:	SR1001		
*Sch Method:	Forward						
Start Date/Time:	10/02/2003	7:00AM	Due Date/Time:	10/07/2003	10:00AM		
Revision:	A		Prdn Doc Status:	Ready for Printing			
Config Code:							
Review Proactive Costing		Update Op List		Update Comp List		Process Monitor	

Production ID Maintenance page

Status

You can add a production ID with a production type of Production in either the *Entered*, *Firmed*, or *Released* status.

You can add a Rework or Teardown production ID with a *Firmed* or *Released* status only.

Note. *Pend Cmpl* (pending complete), *Completed*, *Clsd/Labor* (closed for labor), and *Clsd/Acctg* (closed for accounting) are used when tracking and closing production, but are not used when creating or maintaining a production ID.

To Maintain Production ID Information

Production Area

Select where this production will take place. Once you select a production area, you can view the items produced in that production area by selecting an Item ID. You can't add a production ID for an item that has not previously been defined in the production area selected. Additionally, you must have chosen to maintain production IDs for the production area and item combination.

The production area and item combination must have an Active status to add a new production ID.

Item ID

Select one of the items produced in the production area. You can change the item for any production ID in the *Entered* or *Firmed* statuses.

If the production ID has a status of *Released*, you can change the item for any production as long as subcontracted purchase orders haven't been generated against the production ID.

If you change the Item ID:

- The production ID is rescheduled upon saving the page based on the scheduling method for the production ID and the new item's routing, if one exists.
- The system automatically deletes the existing component list and operation list, and then creates a new component list and operation list for the new item. Once production has a status of *In Process*, you can't change the item ID on this production ID.

Note. If you need to change the Item ID for *In Process* production, you can split the production ID into a new production ID, moving the remaining quantity in process, and, at the same time, specify a new item.

Note. When adding a production ID for an item with item status of Hold or Discontinue, you'll receive a warning message. However, there is no warning for Rework or Teardown production type. If the production ID for an item has a status of Hold, the system gives you the option to cancel that order at Save time.

Prdn Start Qty (production start quantity)

The quantity required at the beginning of the production process. This quantity may be entered or it may be calculated when the end quantity is entered. If calculated, this quantity will be rounded up to account for any operation yield.

You can change the production start or production end quantity for a production ID with a status of *Entered*, *Firmed*, *Released*, or *In Process*. Changing the production quantity reschedules the actual start or due date and time of the production ID.

Prdn End Qty (production end quantity)

The quantity expected at the end of the production process. This quantity may be entered or it may be calculated when the start quantity is entered. If calculated, this quantity will be rounded down to account for any operation yield.

Note. Whether the quantity is a whole number or a decimal depends on the item's unit of measure and quantity precision combination defined in PeopleSoft Inventory.

Note. The production start quantity and production end quantity may not be the same due to operation yield allowances.

Once you add the production ID, keep these in mind when you change the production start or production end quantity:

- If the production ID is *Firmed* or *Released*, the system recalculates the component scheduled quantities.
- If the production ID is *In Process* and you increase or decrease the order quantity, the system adjusts the component scheduled quantities to reflect the new order quantity and marks the production ID as changed so that the Planning Engine reschedules the operations during the next planning run.
- If you have decreased the production quantity and have already issued components, you might have a surplus of components at the WIP location.
- If you have decreased the production start or production end quantity and already kitted material to the production ID, a usage variance results at accounting close time if the excess material isn't returned to stock.
- If you change the production quantity, and the production ID is released and backward scheduled, the system automatically recalculates the actual start date and time.
- If you change the production start or production end quantity and the production ID is released and forward scheduled, the system automatically recalculates the actual due date and time. In this case, the system prompts you to delete the existing component list.
 - If you select *Yes* to the Component List for Production ID prompt, the system deletes the component list and then creates a new component list for the production ID, based on the BOM in effect on the new production due date.
 - If you select *No*, the system uses the existing component list for production.
- If you change the production quantity, and the production ID is *Firmed* or *Released* and subcontracted purchase orders have been created, the system sends a purchase order change request to PeopleSoft Purchasing, indicating a change in production start or production end quantity.
- You cannot decrease the production quantity to a quantity less than what's already been completed to stock.

Warning! A warning is issued if you decrease the production start quantity to a quantity less than the number of serial IDs associated.

BOM and Routing codes

The values appear by default to the production area and item combination effective for the area and item as of today's date. Change the BOM and routing code if alternate routings are used for this production ID.

Only the BOM and routing codes for the item and the selected production type are available. For example, suppose that you select the *Rework* production type, you can only select rework BOMs or rework routings if either are defined. Rework and Teardown routings are optional. If you don't choose a Rework or Teardown routing, the system won't create an operation list for that production ID and you need to manually enter the actual start date and time and actual due date and time. For Teardown production, the Production BOM (or an original production ID) is used to determine the teardown output list. The end item is copied to the component list.

Rtg Itm (routing item)	Displays the item whose routing is used to manufacture, rework, or tear down the end item. Each assembly item may have its own unique primary and alternate routings or reference another item's primary and alternate routings.
Due Date/Time	If you change the due date and time for the production ID so that a different BOM and routing combination is used, a warning message appears enabling you to accept the new BOM and routing combination.

Note. Effectivity dates apply only if you use the Production Option Maintenance component to define the valid BOM and routing combinations.

BOM and routing combinations can be viewed from the Production Option Maintenance component.

Select valid production options (pre-defined BOM and routing combinations) for the item. If you selected the Valid Production Options only option on the Item Attributes by Unit - Manufacturing page, then only the pre-defined combinations can be entered or selected.



Click the Production Option button to access the Production Option Selection page.

Note. If when you create a component list and if there are operations linked to the components which don't exist on the routing, the system assumes those components are linked to the first operation sequence-similar to how the system handles a component with a zero operation sequence. Unmatched output by-products, on the other hand, are linked to the last operation.

Once you add the production ID, keep these in mind if you make any changes to the routing code:

- The system recalculates the production ID's actual start or due date and time based on the new routing's lead times and scheduling parameters.
- If the production ID is in the *Firmed* or *Released* status, changing the routing code also deletes the existing operation list.

The system creates a new operation list for the production ID using the routing code specified.

- If the production ID is in the *Firmed* or *Released* status, you can change the routing code only if a subcontracted purchase order hasn't been generated against the production ID.
- If the production ID is forward scheduled, and the due date and time for production has changed based on the new routing, the system prompts you to delete the existing component list. If you select *Yes* to the Component List for Production ID prompt, the system deletes the component list and creates a new one based on the BOM in effect on the new due date.

Sch Method (scheduling method)	If you are using the production start date as a basis for creating the schedule for the production ID, select <i>Forward</i> . If you are using the production completion date as a basis for creating the schedule for the production ID, select <i>Backward</i> .
Start Date/Time or Due Date/Time	If you selected a routing, enter only one of these dates. The system automatically calculates the other date once you define whether the production for this item is based on forward or backward scheduling.

Keep these in mind when entering a start date/time or a due date/time:

- If a routing isn't used, manually enter both the start and due dates/times, regardless of the scheduling method selected.
- When using *Forward* scheduling and entering a start date, the first minute of operation for the earliest shift of the day appears as the default Time. If the earliest shift spans multiple days, the first minute of the date specified appears as the default time (for example, 12 a.m.).
- When using *Backward* scheduling and entering a due date, the last minute of operation for the latest shift of the day appears as the default Time. If the latest shift spans multiple days, the last minute of the date specified appears as the default time (for example, 11:59 p.m.).

Note. If capacity and material availability are concerns, estimate the start and due dates when you create or maintain the production ID using PeopleSoft Manufacturing, and then schedule the production ID's start and due dates using PeopleSoft Supply Planning.

Revision

If a revision was specified for the area and item, it is displayed here. Otherwise, if the item is revision controlled, the BOM revision in effect as of the due date for the order is used. Changing the revision is valid only if the item is revision controlled. Select an alternate revision if alternates have been specified. If you are changing the revision and the production ID is in *Firmed* or *Released* status, the system prompts you to replace the existing component list.

- If you select *Yes* to the Component List for Production ID prompt, the system deletes the component list and adds a new one based on the BOM's effectivity date
- If you select *No*, the system uses the existing component list for the production ID.

Prdn Doc Status (production document status)

Indicates whether production documents have been printed. Values are:

- *Do not print:* The default if the production ID status is *Entered*.
- *Ready to Print:* The default if the production ID status is *Firmed*. The system prints production documents when the production ID's status is *Firmed* or later.
- *Printed:* Indicates documents have already been printed. You can only print production documents when the production ID's status is *Firmed* or later.

View Serial Info

Click this link to access the Traceability page where you can view the assembly serial IDs that have been associated with this production ID.

Print at Save

Select this check box if you want to print production documents for this particular production ID at save time.

Setup Print Options

Click this link to access the Process/Output Options page to select different print criteria for the production documents.

Review Proactive Costing

Click this link to access the PID Costing page to view the current costs of a production ID based on the component list and operations list. The costs are a snapshot of the production ID's costs at a particular point in time.

See *PeopleSoft Managing Costs 8.8 PeopleBook*, “Managing Actual and Average Costing,” Capturing Production Costs.

Update Comp List

Click this link to access the Update Component List component where you can make changes to the component list for this production ID.

See [Chapter 19, “Maintaining Component Lists,” page 431.](#)

Update Op List

Click this link to access the Update Operation List component where you can make changes to the operation list for this production ID.

See [Chapter 20, “Maintaining Operation Lists,” page 451.](#)

Process Monitor

Click this link to access the Process List page.

See *PeopleSoft PeopleTools PeopleBook: Process Scheduler*.

Adding and Maintaining Production IDs Using a Weekly View

You can also maintain and view production IDs by using the Production by Area pages.

See [Chapter 18, “Maintaining Production Orders and Production Schedules,” Adding and Maintaining Production Schedules, page 421.](#)

Viewing Production Start Date/Shift or Production Due Date/Shift Information

Access the Production Start Date/Shift or Production Due Date/Shift page.

The first or last minute of the production shift is based on these scenarios:

- For *Forward* scheduling, the system uses the work center calendar for the routing’s first operation, if one exists.
- For *Backward* scheduling, the system uses the work center calendar for the routing’s last operation, if one exists.
- If work center calendars don’t exist for the routing’s first or last operation’s work center, the system uses the production calendar, if one exists.
- If a production calendar doesn’t exist, the shift’s start or end time specified for the five-day work week is used.
- If you are changing the due date and time and a routing is specified, the system recalculates the start date and time.

Conversely, if you are changing the start date and time, the system recalculates the due date and time. The production start date and shift and the production due date and shift associated with the start date and time and due date and time are also determined.

- If the production ID is in the *Firmed* or *Released* status, and you replace the start date and time or due date and time, the system updates the operation list with each operation’s new start and due dates and times.
- If you are changing the due date or the due date changes as a result of a change in start date, the system prompts you to delete the existing component list.

If you select *Yes* to the Component List for Production ID prompt, the system deletes the component list and adds a new one based on the BOM in effect on the new due date.

- If the production ID is in the *Firmed* or *Released* status and a subcontracted purchase order has been generated against the production ID, any changes that result in a change to the start date and time or due date and time may impact the purchase order due date.

The system displays a warning message when changes occur that result in a change to the start dates and times and the due dates and times.

Using the Teardown Production ID Search Page

Access the Teardown Original Production ID Search page.

Teardown Original Production ID Search

Search Criteria

Business Unit: US008 Item ID: SR3001

☐ Completion History Diablo 500 Touring Bike

Serial ID:

Lot ID:

☒ Production ID Date

Prdn Due Date Range:

From: To:

Config Code:

Original Production ID Customize | Find | View All | First 1-2 of 4 Last

Production	Details	Configuration Code										
Production ID	Status	Prdn Start Date	Prdn Due Date	Area	BOM Code	Routing	Prdn Start Qty	UOM	Prdn End Qty	UOM	Compl Qty	
☐ AB-PID1	In Process	09/24/2003	09/24/2003	FINAL	1	1	5.0000	EA	5.0000	EA	1.0000	
☐ MDS_PR1	In Process	09/24/2003	09/24/2003	FINAL	1	1	10.0000	EA	10.0000	EA	2.0000	

Teardown Original Production ID Search page: Production tab

Note. If the production type is Teardown, the output list is based on the components used on a previous production ID or on the components designed as teardown outputs on the item's BOM.

Select Completion History, and if the Serial ID and Lot ID exist for the original order, select a value.

You can also select a Prdn Due Date Range (production due date range) or Config Code (configuration code) from the available options. Make your selection, and click Search for a list of production IDs. If multiple production IDs were used to create this item, the system generates a list of production IDs, but it only selects production IDs with a status of *In Process* or later status with a production type of *Production*.

Production Tab

Select the check box next to the original Production ID that you're tearing down.

Using Planning Attributes

Access the Planning Attribute page.

Frozen Substitutes

Select this check box to freeze substitutes in PeopleSoft Supply Planning. When you send this production ID to PeopleSoft Supply Planning, the Planning engine doesn't consider substitute components.

Frozen Production

Select this check box to freeze this production ID in the PeopleSoft Supply Planning system. This means that when you send this production ID to PeopleSoft Supply Planning, the Planning engine doesn't reschedule the production ID. Set a default at the manufacturing business unit level to create all new rework or teardown orders with a frozen status, indicating that you don't want PeopleSoft Supply Planning to reschedule those orders.

See Also

[Chapter 3, "Defining Your Business Unit Structure," Setting Up Manufacturing Business Unit Production Options, page 38](#)

[Chapter 15, "Defining Production Options," page 313](#)

[Chapter 14, "Structuring Routings," page 281](#)

[Chapter 18, "Maintaining Production Orders and Production Schedules," Maintaining Production ID Output Information, page 403](#)

[Chapter 22, "Issuing Material to Production," page 481](#)

PeopleSoft Product Configurator 8.8 PeopleBook, "Working With Configuration Codes"

Displaying Production ID Detail

Access the Production ID Detail page.

Production ID Maintenance		Production ID Detail		Production ID Text																			
Unit:	US008	Production Type:	Teardown	Production ID:	MDS_TD1																		
Item ID:	SR3001 Diablo 500 Touring Bike	Status:	In Process																				
Prdn Start Qty:	2.0000 EA	BOM Code:	1	Routing:																			
Prdn End Qty:	2.0000 EA																						
Frozen Sub:	No	Print Docs:	Ready																				
Frozen:	No	Print Count:																					
<table border="1"> <thead> <tr> <th colspan="3">Actual Date/Time Information</th> </tr> </thead> <tbody> <tr> <td>Start Date/Time:</td> <td>09/24/2003</td> <td>7:00AM</td> </tr> <tr> <td>Due Date/Time:</td> <td>09/24/2003</td> <td>9:00AM</td> </tr> </tbody> </table>			Actual Date/Time Information			Start Date/Time:	09/24/2003	7:00AM	Due Date/Time:	09/24/2003	9:00AM	<table border="1"> <thead> <tr> <th colspan="3">Prdn Date/Shift Information</th> </tr> </thead> <tbody> <tr> <td>Prdn Start Date/Shift:</td> <td>09/24/2003</td> <td>1</td> </tr> <tr> <td>Prdn Due Date/Shift:</td> <td>09/24/2003</td> <td>1</td> </tr> </tbody> </table>			Prdn Date/Shift Information			Prdn Start Date/Shift:	09/24/2003	1	Prdn Due Date/Shift:	09/24/2003	1
Actual Date/Time Information																							
Start Date/Time:	09/24/2003	7:00AM																					
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Prdn Date/Shift Information																							
Prdn Start Date/Shift:	09/24/2003	1																					
Prdn Due Date/Shift:	09/24/2003	1																					
Completed Qty:	0.0000	Scrapped Qty:	0.0000	Expected Yield %:	100.0000																		

Production ID Detail page

Frozen Production

Indicates whether a decision was made to hold or firm up the due date for this production ID by PeopleSoft Supply Planning. Change production information using the Production ID Maintenance page. If you change production

information and the status is *Yes*, the system displays a warning message indicating that the production ID has been frozen by PeopleSoft Supply Planning and the change results in the production ID being rescheduled. You can continue or cancel your changes. If you change this information, the production ID is no longer frozen and the status changes to *No*.

Frozen Substitutes	Indicate whether the system has frozen substitutes in the PeopleSoft Supply Planning system. This means that when you sent this production ID to PeopleSoft Supply Planning, the Planning engine didn't consider substitute components.
OM Business Unit (Order Management business unit), Sales Order No (sales order number), and Configuration Code	These fields display sales order information if your production ID is the result of a sales order configured in PeopleSoft Order Management.
Print Count	The number of times production documents have been printed for this production ID.
Prdn Doc Status (production document status)	Indicates whether production documents have been printed.
Completed Qty (completed production start or production end quantity)	Indicates whether assemblies have been completed to stock, routed to another WIP location, or issued directly to another production ID.
Scrapped Qty (scrapped quantity)	The number of assemblies that have been scrapped in process.

Maintaining Production ID Output Information

Access the Production ID Outputs page.

Production ID Maintenance		Production ID Detail		Production ID Text		Production ID Outputs	
Unit:	US008	Production ID:	MDS_TD1				
Item ID:	SR3001	Status:	In Process				
	Diablo 500 Touring Bike						
Production Type:	Teardown	BOM:	1	Routing:			
Prdn Start Qty:	2.0000 EA	Prdn End Qty:	2.0000 EA				

Output List		Find View All		First 1 of 3 Last	
*Output Type:	Teardown	*Output Item:	PS1003	☐ Non-Owned Item	
Op Seq:		Pedal, Clipless			
Output Quantity:	4.0000 EA	Per:	Asy	Source Cd:	Buy
Qty Compl To		Output Schd Qty:	4.0000	☐ Serial	
Date:					
*Release Type:	None	Release Offset:			

Production ID Outputs page

Output Type

Values are:

- *Primary* item: Main output from the manufacturing process.
- *Co-Product*: Item that—along with the primary item or output—is planned for and produced as part of the manufacturing process. It shares the cost of the process, and there may be independent demand in planning for this item.
- *Recycle* or *Waste* by-product: Item that is incidental to the manufacturing process. It can be either a waste product, or a recycle by-product, which can be used as an input to other processes. The by-product has either a relief (negative) cost for recycle by-products or a disposal (positive) cost for waste by-products. There would probably not be independent demand for by-products.
- *Teardown*: Component items that result from tearing down a completed end item. Components can be reused in other production and can be returned to stock or routed to another production ID. This output type is available only for teardown production IDs.

Op Seq (operation sequence)

Operation step where the output is generated. For primary and co-products, this is always the *last* operation. By-products and teardown outputs can be generated at any intermediate operation. If the operation sequence is 0 or doesn't exist on the operation list, it is assumed the output is generated at the last operation.

Output Sched Qty (output scheduled quantity)

Output quantity based on the scheduled quantity but adjusted for scrap. The format for this display-only field may depend on the item's unit of measure and quantity precision combination defined in PeopleSoft Inventory.

For example, suppose that Item ID A0007 has a unit of measure of *EA* and a natural round, whole number combination, then only whole numbers entered appear.

- Co-product quantity:

If the primary or co-product is expressed in terms of a quantity per order, the quantity specified on the BOM is the output quantity, regardless of the expected output quantity for the production ID or production schedule.

If the primary or co-product output quantity is expressed in terms of a quantity per assembly, a QPA will first be determined. Primary or Co-product QPA = BOM output quantity/BOM Quantity. The expected completions for the primary or co-product = Expected Completions at the last operation * Primary or Co-product QPA.

- By-Product Quantity:

When determining the output for the recycled and waste products, the system will use the expected start quantity for the operation where the by-product is completed.

If the by-product output quantity is expressed in terms of a quantity per order, the quantity specified on the BOM will be used, regardless of the operation start quantity.

If the by-product output quantity is expressed in terms of a quantity per assembly, a QPA for each output will be calculated. The QPA is determined by dividing the by-product output quantity by the BOM quantity. The by-product output quantity for the PID/Schedule is determined by multiplying the operation expected start quantity by the QPA.

Release Type

This field is used by PeopleSoft Supply Planning and indicates if the entire quantity of an end item at an operation should be completed at the end of the operation. Select *None* for no incremental release. Select *Over Time* to indicate that you want a specific quantity of end items to be on hand before completions occur.

Release Offset

This field is used by PeopleSoft Supply Planning and works with the *Over Time* option of release type. Enter the quantity of end items to be on hand before completions occur.

Adding Unplanned By-Products



Click the Add button to add an additional (unplanned) by-product. Add or change *Recycle*, *Teardown*, or *Waste* by-products on your production ID; however, you can't add or change primary items or co-products.

Note. You can only add teardown outputs to a *Teardown* type production ID. Similarly, you can't add recycle or waste outputs to a *Teardown* production ID. However, you can change the output quantity, operation sequence, and Per for any by-products.

Output Qty (output quantity) Whether you can enter a whole number or a decimal may depend on the item's unit of measure and quantity precision combination that was defined in PeopleSoft Inventory.

Res % (resource percentage) Pertains to the primary and co-products.

Important! Only by-products such as recycle or waste products can be added or changed. You can't change or add primary items or co-products.

If you are maintaining a rework production ID, the output page lists only the reworked item as the end item. You can't define co-products or by-products with rework.

If you change the output list and you are integrating to a third-party MES, PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

See Also

[Chapter 5, "Integrating with Third-Party Systems," page 57](#)

[Chapter 18, "Maintaining Production Orders and Production Schedules," Manufacturing Execution System Integration, page 386](#)

Generating Production ID Splits

When required, you can split a single production ID into two or more production orders.

You can only split production with a status of *In Process*. Quantities can be split by operation based on the quantity that still exists at the original production ID operation sequence. You can also split a batch production ID—order that has at least one co-product or by-product—in addition to the primary item. You can split the entire production quantity to a new production ID, item ID or production area. All new production IDs will also have a production status of *In Process*.

You can only split production IDs. You can't split production schedules.

Note. You cannot split an *In Process* production ID if there are pending pick plans, pending bar code transactions, or subcontracted operations that are also in process.

Note. If you want to split a *Pending Complete* production ID, change the production status to *In Process*. You must reopen production to change the status back to *In Process*.

If you split a production ID that is being traced using serial genealogy, be aware of these issues:

- You will select the assembly serial ids to split. These serial ids will become disassociated from the original PID and become associated to the new PID. Any components associated with split assembly serial IDs are automatically transferred to the new Production ID.
- If the new (To) item is not using serial genealogy, you will no longer be able to track genealogy information.

In this scenario, the new production ID will not have any historical genealogy information.

- You will be able to use the associate serial commands to associate additional serial numbers with the new production ID.
- You cannot transfer components to another production ID if they have been previously associated with a production ID using serial genealogy, unless those components are associated to an assembly serial that is being split, in which case they are automatically transferred.

You cannot make serial associations when transferring components during the production ID split process.

This section discusses generating production ID splits and how to:

- Define production ID split information.
- Enter production ID split quantities.
- Edit components to be transferred.
- Correct errors after a production ID split and transfer components between production IDs.

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” Production ID Splits, page 384

Common Elements Used in This Section

Component ID	Components that are in effect for the production ID at the time of the production split. This component may be a substitute item.
Op Seq (operation sequence)	Operation step in the manufacturing process where the components are required.
From Production ID	Original (From) production ID. If the production ID has been split multiple times, there is a separate entry for each split. The asterisk (*) indicates the original production ID.
To Production ID	New (To) production ID number. A new number is created each time the original production ID is split.
Split Qty (split quantity)	Production quantity split to the new production ID.
From Prdn Area and Description	Location where the original production ID was being manufactured.
To Prdn Area and Description	Location where the new production ID is to be manufactured.
From Date/Time and To Date/Time	Beginning and ending date for the production that you want to view. The date/time refers to the date and time when the completion transaction was recorded.
Date Timestamp	Date and time the production ID split transaction occurred.
Inquiries	Options to view specific production transaction information. Values are: • <i>Completions Detail</i> • <i>Component Consumption</i>

• *Operation Detail*

Pages Used to Generate Production ID Splits

Page Name	Object Name	Navigation	Usage
Production ID Split - Header	SF_SPLITID_HDR	Production Control, Process Production, Split Production, Production ID Split, Header	Define production ID split information. Split only production IDs with a status of <i>In Process</i> .
Production ID Split - Operation List	SF_SPLITID_OP	Production Control, Process Production, Split Production, Production ID Split, Operation List, Header Enter information on the Header page before accessing this page.	Indicate the production quantity to be split from the original production ID at specific operation steps. Quantities can be split by operation based on the quantity that exists at the original production ID operation sequence.
PID Split Component List	SF_SPLITID_CMP_SEC	Production Control, Process Production, Split Production, Production ID Split, Operation List Enter a Split Qty (split quantity) on the Production ID Split - Operation List page. Click Tab and click the Components button.	Edit components to be transferred to the new production ID.
Production ID Split - History	SF_SPLITID_HIST	Production Control, Process Production, Split Production, Production ID Split History	View production ID split history.
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history.
Production History Details	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View transaction history details.
Production ID Comp Transfers	SF_COMP_TRANSFER	Production Control, Process Production, Split Production, Production ID Comp Transfers, Production ID Comp Transfer	Correct errors after a production ID split. Use this page to transfer components between production IDs to cover shortages.

Page Name	Object Name	Navigation	Usage
Component Detail	SF_COMPTR_COMP_SEC	Production Control, Process Production, Split Production, Production ID Comp Transfers, Production ID Comp Transfer Click the Component Search button and select the Detail link for From Component or To Component.	View component shortages for the From production ID or the To production ID.

Defining Production ID Split Information

Access the Production ID Split - Header page.

Production ID Split - Header page

From Production

Displays the production header data from the production ID that you are going to split.

Split Qty (split quantity)

If the production ID that you want to split has no operation list, enter the total quantity you want to split from the original production ID. Whether you can enter a whole number or a decimal may depend on the item's unit of measure and quantity precision combination that was defined in PeopleSoft Inventory.

For example, if Item ID A0007 has a unit of measure of EA and a Natural Round, Whole number combination, then you can only enter whole numbers. If you enter an incorrect number format, you'll receive an error message.

If this field is unavailable, enter the split quantity on the Operation List page because there may be several operation steps with quantities that can be split.

Note. You can't split a higher quantity than what is remaining at the operation sequence. For example, suppose that there is a quantity of 20 at Operation Sequence 10, you can't split more than 20. If you enter a higher split quantity than what is available, you receive an error message.

View Trace Info

Click this link to access the Traceability page where you can view the assembly serial IDs that have been associated with this production ID.

To Prdn ID (to production ID)

Enter a value for the new production ID if you aren't using automatic numbering. If you are using automatic numbering, retain *NEXT* as the value.

New Rev (new revision)

Enter a value if the item is revision-controlled and this new production ID represents a new revision for the end item.

Note. Changes to the revision on the To Item ID is reflected on the To Production ID header only. Components copied during the production ID split process are based on the From Production ID's component list and aren't based on the revision number entered in the New Rev field.

To Prdn Area (to production area)

The area where the new production ID is processed. The production area for the To production ID can differ from the production area of the From production ID, but the end item must be assigned to the production area where you are moving the split quantities.

If you select an area that has a WIP storage location that differs from the From production area, you receive a warning message indicating that any material issued in WIP won't be automatically transferred to the new area's WIP location. Use the EZ Transfer page or the Material Release page to move the components to the new WIP location.

To Item ID

You can split the original production ID to the same item or to a different item. However, you cannot split a primary item to a batch item—an item that has at least one co-product. If you're splitting a batch item to a different batch item, then the new item inherits the by-products from the original item ID as long as they aren't fully completed on the From Production ID, in which case they aren't copied.

Note. Where the To Item ID in a production ID split has an item status of Hold or Discontinue, you receive a warning message, but the warning message won't prevent you from performing the action.

These situations can't exist when selecting a value:

- The To Item ID cannot exist as a component on the parent component list
- The To Item ID cannot exist on the parent output list as a by-product because the To Item ID would be the end item as a primary item and a by-product.
- The To Item ID cannot be changed on rework or teardown orders.

Config Code (configuration code)

Select or enter a value if the item is configured:

- If the From Item ID and the To Item ID are identical, you can optionally change the configuration code for the To Production ID.
- If you split to a different item, the system prompts you to select a new configuration code for the To Item ID.
- If the configuration code changes during the split process you can change the sales order for the new To Production ID.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Making Stock Quantity Adjustments and Transfers Within the Business Unit,” Making Stock Location Transfers Online

Chapter 22, “Issuing Material to Production,” Issuing Material to the Shop Floor, page 501

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items,” Managing Inventory by Item Status

Entering Production ID Split Quantities

Access the Production ID Split - Operation List page.

Header		Operation List											
From Production													
Unit:	US008	Production ID:	SCC2A	Prdn Start Qty:	10.0000	Prdn End Qty:	10.0000	EA					
To Production													
Split Qty:	3.0000	EA	*To Prdn ID:	NEXT	☒ Reset Prdn Doc	Print Docs:	Ready	Components					
Operation List													
Customize Find View All First 1-5 of 5 Last													
Op Seq	Work Center	Description	Quantity Issued to Operation	Qty Completed and Thru Oper	Qty Scrapped	Qty Still at Op	Split Qty	View Trace Info	Op Yld %	Scrap Pct	Count Point	Task Code	Description
10	FI-ASSY	Final Assy	10.0000	0.0000	0.0000	10.0000	3.0000		100.0000	0.00	☐	FORK	Add Fork
20	FI-ASSY	Final Assy	0.0000	0.0000	0.0000	0.0000			100.0000	0.00	☐	FINAL	Final Assy
30	INSP	Proc Insp	0.0000	0.0000	0.0000	0.0000			100.0000	0.00	☐	INSP	Proc Insp
40	PAINT01	Painting 1	0.0000	0.0000	0.0000	0.0000			100.0000	0.00	☐	PAINT	Paint
50	INSP	Proc Insp	0.0000	0.0000	0.0000	0.0000			100.0000	0.00	☐	INSP	Proc Insp

Production ID Split - Operation List page

To Production

Split Qty (split quantity)

Appears only on the header of this page, when the From Production ID has operations and reflects the total split quantity for the To Production ID.

To Prdn ID (to production ID)

Use *NEXT* if you are using automatic numbering, or enter a specific production ID number for the new production ID.

Reset Prdn Doc (reset production documents)

Select this check box to reprint the production documents for the To Production ID.

Components

Click to view the production ID Components page. Use this page to make changes to the components that you're copying to the To Production ID. This button is unavailable until a split quantity is entered at an operation.

Note. If you are splitting the entire production quantity to a new production ID, you cannot make adjustments to the components.

Operation List

This information appears for the From Production ID, and is used to split operation data to the new production ID:

Op Seq (operation sequence)	Operation step where processing has or will be take place. Components or ingredients can be added here.
Work Center and Description	Current location where the From Production ID is being processed. These fields are display-only and cannot be changed here.
Quantity Issued to Operation	Production quantity of assemblies completed at the prior operation and sent to the current operation. If the operation is the first operation in the process, the Qty Issued to Operation is the production ID quantity.
Qty Completed and Thru	Quantity completed at the operation. This quantity doesn't include any scrapped assemblies. These fields are display--only and cannot be changed here.
Qty Scrapped (quantity scrapped)	Number of assemblies that have been scrapped at the operation sequence. This field is display-only.
Qty Still at Op (quantity still at operation)	Production quantity that is considered still in process and that can be split to a new production ID. This display-only field is calculated using this formula: Issued Quantity - (Quantity Completed and Thru the operation + Scrapped Quantity)
Split Qty (split quantity)	Enter the production quantity to be transferred to a new production ID. Enter a split quantity for each operation that has a quantity remaining at the operation. However, you cannot split a quantity that is greater than the quantity still at the operation sequence.
	Note. You can split the entire original production quantity if you haven't recorded any completions or scrap at any prior operations.
Scrap Pct (scrap percentage)	A weighted average of the scrap percent specified when recording end item completions and scrap. This percentage represents the percentage of run time expended prior to the end item being scrapped.
Count Point	The check box is display-only if this operation sequence is a count point. Define an operation step as a count point on the new production ID by using the Operation List Maintenance page.
Task Code and Description	Represents the task that is being performed at the operation step.

See Also

[Chapter 13, “Maintaining Tasks,” page 269](#)

PeopleSoft PeopleTools PeopleBook: Process Scheduler

Transferring Components

Access the PID Split Component page.

Issue Quantities Tab

Issue Qty (issue quantity)	For components using the Issue or Replenishment material issue method, this is the quantity consumed from the WIP location for the component and is charged to WIP. For components using the Kit method, this is the quantity issued directly to the production ID.
Yield Loss Qty (yield loss quantity)	Represents the number of components lost or damaged during the production run.
To Issue Qty (to issue quantity)	Represents the quantity of the component to be transferred to the new production ID. It's automatically calculated based on the end item quantity being transferred and the QPA of the component. This field is available if there are remaining assemblies that can be transferred at the operation sequence where the production ID split is occurring and components are tied to the operation sequence. Enter the quantity that you want to transfer to the To Production ID.
To Yield Loss Qty (to yield loss quantity)	The quantity of components that was scrapped during the assembly process and consumed from the WIP location. This amount is transferred to the To Production ID. This field is available if there are remaining assemblies that can be transferred at the operation sequence where the production ID split is occurring and the components are tied to the operation sequence. Enter the quantity that you want to transfer to the new (To) production ID.
Iss Qty Total (issue quantity total)	The total number of components to be issued to the To Production ID. For lot- or serial-controlled items, this quantity represents the sum of lot or lot quantities that you specified from within the Lot/Serial page accessed by clicking the button on the first column of the row. This field is display-only and can't be changed here.

Pending Quantities Tab

Sched Qty (schedule quantity)	Represents the quantity per assembly based on the quantity entered and production quantity.
Pend Issue (pending issue)	The quantity used based on the quantity completed at the operation multiplied by the quantity per assembly. If the component's quantity is expressed per order, this is the quantity for each order. This quantity hasn't yet been consumed from the WIP location due to material shortages.

Pend Loss (pending loss quantity)	Represents the quantity of components scrapped during the assembly process but not yet consumed from the WIP location due to material shortages. This quantity is based on the From Production ID.
To Sched Qty (to scheduled quantity)	The total number of components scheduled to be used for the To Production ID.
To Pend Issue (to pending issue quantity)	Represents the new (To) Production ID quantity used based on the quantity completed at the operation multiplied by the quantity per assembly. If the component's quantity is expressed as per order, this is the quantity for each order.
To Pend Loss (to pending loss quantity)	Represents the quantity of components scrapped during the assembly process but not yet consumed from the WIP location due to material shortages.
Original Component ID	The name of the original component ID.
OK	Click to return to the Operation List page.
Save	Click to process the production ID split. Upon saving the page, the production ID split is generated and these scenarios occur: • The To Production ID is created with a production status of <i>In Process</i>. All assemblies completed and scrapped prior to the production ID split remain with the From Production ID. • The From Production ID routing and associated component list information are copied to the To Production ID. • If the components use the Issue method, quantities issued are carried forward based on the split quantity. Issue quantities after the split operation aren't carried forward. • Scrap costs remain with the From Production ID. However, you can make scrap adjustments to the To Production ID during the completions process.

Note. If you are splitting the entire production quantity, all the material, actual labor and machine hours, earned conversion costs, actual conversion costs, and scrap costs are copied to the To Production ID. The production status of the original production ID is set to *Canceled*, and has a production quantity of 0.

Note. You can make manual changes to the To Production ID by using the Production ID Maintenance, Component List Maintenance, or Operation List Maintenance pages. Make changes to the production start or production end quantity, BOM code, scheduling method, start date and time, or due date and time.

See Also

[Chapter 18, "Maintaining Production Orders and Production Schedules," Adding and Maintaining a Single Production ID, page 395](#)

[Chapter 23, "Completing Operations and Recording Scrap," Understanding Recording Completions and Scrap, page 521](#)

Making Production ID Split Component Transfer Adjustments and Transferring Components Between Production IDs

Access the Production ID Component Transfer page.

Production ID Comp Transfer

*Unit:

*Production ID: [Detail](#)

*To Production ID: [Detail](#)

Shortage Type Option

☐ Production Shortages
☐ Pending Shortages
☒ Both Production and Pending

Component List

Customize | Find | View All | First 1-5 of 10 Last

Details	Configuration Code	Component ID	Op Seq	Quantity	Std UOM	Per	Sched Qty	Issue Qty	To Sched Qty	To Issue Qty	Shortage	To Op Seq	Transfer Qty	Original Component ID
		FR7001	10	1.0000	EA	Asy	100.0000	70.0000	0.0000	0.0000	0.0000	0		FR7001
		FR7005	10	1.0000	EA	Asy	100.0000	70.0000	12.0000	2.0000	10.0000	10		FR7005
		FR7012	20	1.0000	GAL	Asy	100.0000	40.0000	12.0000	2.0000	10.0000	20		FR7012
		HB9002	30	1.0000	EA	Asy	100.0000	0.0000	12.0000	0.0000	12.0000	30		HB9002
		LT3009	20	1.0000	GAL	Asy	100.0000	40.0000	0.0000	0.0000	0.0000	0		LT3009

Production ID Comp Transfer page

Note. You can only perform component transfers on production orders with a status of In Process. In addition, only production ID materials that have actually been issued from the original production ID can be transferred to the To Production ID.

Click the Detail link to view production details for either the From production ID or the To Production ID.

Shortage Type Option

You can view all components on the From Production ID or just the components that currently have shortages on the To Production ID. If you elect to view component shortages, the values are:

- *Pending Shortages:* System displays all pending shortages that exist when the pending consumed quantity and the pending yield loss quantity is greater than 0. This condition indicates that the component was not found in the WIP location or storage location if kitting (kit issues creates pending quantities in some instances) or insufficient quantity on hand was found and the full quantity couldn't be issued. A pending issue quantity could exist on the newly split production ID if there are material shortages for the component.
- *Production Shortages:* System displays all production shortages that exist when the issue and yield loss quantity is less than the component's scheduled quantity.
- *Both Production and Pending:* System displays all components on the To Production ID, including those that have both production and pending shortages.

Search

Click to retrieve the selected production ID information.

View Short

Click to view the components that have shortages.

View All



Click to retrieve all components.

Click the Component Search button to access the links for these pages:

- From Component: Click to view component detail information for the From Production ID that was split.
- To Component: Click to view component detail information for the To Production ID.
- To Component List: Click to view the component list of the To Production ID if the component appears more than twice on the To Production ID.

Component List

Issue Qty (issue quantity)	Number of components already issued or consumed on the From Production ID.
To Sched Qty (to schedule quantity)	Scheduled or required component quantity on the To Production ID based on production quantity and component’s quantity per assembly or quantity per order.
To Issue Qty	Number of components already issued to the To Production ID.
To Op Seq (to operation sequence)	Select the operation step where the component is added to the To Production ID.
Transfer Qty (transfer quantity)	Enter the quantity of the component that you want to transfer to the To Production ID. If you enter a quantity that is less than what is outstanding, a pending issue quantity remains.
Original Component ID	Appears if the component was a substitution for another component requirement.

Creating Production Schedules

After fine tuning your production plan, you may need to manually enter or maintain any production you want to track by day and shift using the Production Schedule pages.

Important! Both production IDs and production schedules can be created and maintained by using these pages.

Production schedules can be created and maintained for each production area/item combination. You can add a schedule for production quantities that are in the Entered status at the summary level. Since you define production quantities due on a specific production due date/shift, production schedules are always backward scheduled. You also can maintain multiple production schedules per shift, and set the due time as well as the due date.

Note. You can’t use production schedules to track rework, teardown production, or regular production using the *Kit* issue method. Rework BOMs and routings and teardown routings aren’t available for production schedules.

When you change any information on an existing production schedule, the system optionally sends the Production ID Change workflow notification to selected roles that you defined. These roles could include a planner/buyer or a production control manager.

When you release or modify released production schedules, if you are integrating to a third-party MES, PeopleSoft Manufacturing uses the Production Order Update EIP to publish an asynchronous message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

In addition, you can use the Production Order Sync EIP to synchronize production schedules created in PeopleSoft Manufacturing with other third-party systems by using a synchronous publish message.

This section discusses creating production schedules and how to:

- Define and maintain production schedules.
- View production schedule details.
- View and add production schedule output information.

See Also

[Chapter 5, “Integrating with Third-Party Systems,” page 57](#)

[Chapter 1, “Getting Started with PeopleSoft Manufacturing,” page 3](#)

[Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649](#)

Common Elements Used in This Section

Frozen	Select this check box to freeze this production schedule in the PeopleSoft Supply Planning system. When you send this production schedule to PeopleSoft Supply Planning.
Frozen Sub (frozen substitutes)	Select this check box to freeze substitutes in the PeopleSoft Supply Planning system. When you send this production schedule to PeopleSoft Supply Planning, the Planning engine doesn't consider substitute components.
Revision	Change if you want to use alternate revisions for this item, if the item is revision-controlled.

Pages Used to Create and Maintain Production Schedules

Page Name	Object Name	Navigation	Usage
Production by Area Summary	SF_PA_SCH_SUMMARY	Production Control, Define Production, Production IDs/Schedules, Production by Area Summary	Define and maintain production schedules. You can also use this page to add production IDs or to add, modify, and view all production for a specific production area.

Page Name	Object Name	Navigation	Usage
Total by Production Area, Shift	SF_PA_SCH_SHIFT	Production Control, Define Production, Production IDs/Schedules, Production by Area Summary Click the Production Detail button and select the Shift Total link.	View the schedule quantity by shift due for each day of the week.
Production by Area Details	SF_PA_SCH_DT_MAINT	- Production Control, Define Production, Production IDs/Schedules, Production by Area Details - Production Control, Define Production, Production IDs/Schedules, Production by Area Summary - Click the Production Detail button and select the Details link.	View details for a production schedule. You can also use this page to add production IDs or add, modify, or view details for all production in a specific production area. You must define at least one production schedule before you can access this page.
Production by Area (inquiry)	SF_PA_SCH_SUM_INQ	Production Control, Define Production, Review Production Information, Production by Area	View all production in a specific production area. Define at least one production schedule or production ID.
Production Output List	SF_SCH_OUTPUT_LIST	Production Control, Define Production, Production IDs/Schedules, Production by Area Details Click the Output List button.	View or add production output information.
Production Selection	SF_PRDN_ITEM_SEL	Production Control, Define Production, Review Production Information, Production for an Area/Item, Production Selection	Access production, rework, and teardown information for a specific item. View production IDs, production schedules, or a combination of both. Define at least one production ID or production schedule for an item.
Production List	SF_PRDNID_ITEM_VW	Production Control, Define Production, Review Production Information, Production for an Area/Item, Production List	Access production information for a specific production schedule. Use this page to see the status of all production for a production area at the operation level. Define at least one production schedule for an item.

Page Name	Object Name	Navigation	Usage
Production for an Item - Production Detail (inquiry)	SF_PRDNINQ_STATIC	Production Control, Define Production, Review Production Information, Production for an Item, Production Detail	Display production, rework, or teardown details associated with any production ID displayed on the Production for an Area/Item inquiry page.
Operation Detail	SF_PRDN_DATA_DTL	Production Control, Define Production, Review Production Information, Production for an Area/Item, Operation Detail	View operation list details.
Production Item Output (inquiry)	SF_PRDID_ITEM_OUT	Production Control, Define Production, Review Production Information, Production for an Item, Production Output	View output information for a specific item. Define at least one production ID or production schedule for an item.
Production Text (inquiry)	SF_PRDNINQ_PRTXT	Production Control, Define Production, Review Production Information, Production for an Area/Item, Production Text	View text associated with any production schedule or production ID.
Production Inquiry - Production Selection	SF_PRDN_SELECTION	Production Control, Define Production, Review Production Information, PID/Schedule, Production Selection	Define production criteria for the production inquiry.
Production Inquiry	SF_PRDN_MAINT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Inquiry	View production information for a particular production schedule or production ID. Enter production information on the Production Selection page before accessing this page.
Production Detail Inquiry	SF_PRDN_STAT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Detail Inquiry	View additional details for selected production.
Production for an Item - Production Item List	SF_PRDNID_ITEM_VW	Production Control, Define Production, Review Production Information, Production for an Item, Production Item List	View a production summary for a selected item.

Page Name	Object Name	Navigation	Usage
Production Output	SF_PRDN_OUTPUT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Output	View output information for production IDs or production schedules. Enter production information on the Production Selection page before accessing this page.
Production Text Inquiry	SF_PRDN_TEXT_INQ	Production Control, Define Production, Review Production Information, PID/Schedule, Production Text Inquiry	View text associated with the selected production.
Production Output Mix Inquiry - Production Selection	SF_COMP_OUT_SEL	Production Control, Define Production, Review Production Information, Production Output Mix, Production Selection	Enter the search criteria for the production schedule whose component and output data that you want to display. Define at least one production schedule or production ID with multiple outputs.
Prdn Op Summary (production operation summary)	SF_COMP_OUT_SUM	Production Control, Define Production, Review Production Information, Production Output Mix, Prdn Op Summary	View production operation sequence summary data at a summary level, including task and work center information. Enter search criteria in the Production Output Mix Selection page to see data that appears in this inquiry.
Prdn Output/Component Details	SF_COMP_OUT_DTL	Production Control, Define Production, Review Production Information, Production Output Mix, Prdn Output/Component Details	View specific production component and output ID data by operation sequence at a detail level. Enter production information on the Production Selection page before accessing this page.
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history.
Production History Details (inquiry)	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View transaction history details based on your selection criteria such as Completions Detail, Consumption Detail, or Operation Detail.

Page Name	Object Name	Navigation	Usage
Production Schedule by Area Report	RUN_SFS2007	Production Control, Define Production, Reports, Schedule by Area Report, Production Schedule by Area	Lists total quantities of how much you're producing by item each day for each repetitive production area.

See Also

[Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2007 - Production Schedule by Area Report, page 675](#)

Adding and Maintaining Production Schedules

Access the Production by Area Summary page.

Production by Area Summary

Unit:    

Production Area:

Date Query: Monday **Week Beginning:** 10/05/2003

Production  [Find](#) | [View All](#) [First](#)  1 of 1  [Last](#)

* Due Shift: *Item: Professional Road Bike, Womans

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	100.0000	75.0000		100.0000		

Production by Area Summary page

Date Query

Enter the production due date to add or view production for the appropriate work week. After you enter a date, the system displays the corresponding day of the week.



Click the Fetch button to retrieve the production information, to add a new production schedule or production ID, or to make changes to existing production.

Due Shift (production due shift)

The system displays the shift of when the production start quantity will be completed.

The system also displays the schedule quantity due for each day of the week.



Click the Production Detail button to select one of these links:

- **Details:** Click to access the Production by Area Details page to make changes to the production quantities by day.
- **Shift Total:** Click to access the Total by Production Area, Shift page to view additional production information.



Click Insert to add a production quantity for an item in the selected area.

Note. Click the Insert Row button to enter a row on this page. To delete a production start or production end quantity, use the Production by Area Details page.



Click the Reset Selection button to clear the information that appears in the grid and select a new area or date.

Due Shift

Enter a production due shift for the item and scheduled quantity.

Item

Enter a value. You can maintain production quantities for items that are manufactured using either production schedules or IDs. The only restriction is that the item must be defined for the production area selected.

Once you save the information, you can't change the item—you can only delete the schedule.

Note. When adding an assembly with item status of Hold, you receive a warning message. The warning message won't prevent you from performing the action. The system also gives you the option to cancel at save time.

Production Quantity

Enter the quantity on the day the week that you want the production to be completed. If you have specified a Rate Quantity Per Shift for the area and item, you can view and select that rate by clicking the down arrow in the appropriate day column. For example, the day that you choose for the quantity is the production due date. Whether you can enter a whole number or a decimal may depend on the item's unit of measure and quantity precision combination defined in PeopleSoft Inventory. For example, suppose that Item ID A0007 has a unit of measure of *EA* and a natural round, whole number combination, then you can only enter whole numbers. If you enter an incorrect number format, you receive an error message.

The system automatically calculates the production start date and shift as well as the actual start date and time and actual due date and time once you click the Process button. In addition, when you enter a quantity for a day:

- The system adds the quantity on the date corresponding to the day of the week in which the quantity was entered.

The time is set to the last hour of operation for the last work center on the item's routing.

- If you're using operation yield, the system calculates the production start quantity based on the production end quantity. Because production schedules are always backward scheduled, you'll enter the production *end* quantity.
- You can change the due time at the production detail level.



Click the Production Detail button next to the Quantity field on the day of the week that you want to change. Click the Detail link to complete the transfer.

Important! You must click the Process button to save the schedule before you can access the Detail page.

You can change the due time for the scheduled production from the Detail page. Additionally, you can define and maintain multiple production quantities, each with a different due time.

All changes to quantities for a day must be done at the production *detail* level.

You can't delete production quantities in the Production by Area Summary page. Navigate to the Production by Area Details page to delete quantities.

If a routing isn't defined for the item and you've entered a quantity for a shift and a day on this page, you must define the production start date and production start shift on the Production by Area Details page. The system automatically changes the due time to the last hour of operation based on the production calendar. The start date and shift automatically changes to the due date and shift. The time automatically changes to the first hour of operation based on the production calendar. You can change the actual start date and time within the production start shift as well as the actual due time within the production due shift.

The system displays production due shift options based on these scenarios:

- The system uses the work center calendar for the routing's last operation, if one exists.
- If a work center calendar doesn't exist for the routing's last operation's work center, the system uses the production calendar, if one exists.
- If a production calendar doesn't exist, the shift for the five-day work week is available.

If you are adding production on the summary page, they are added in the *Entered* status. Go to the Detail page to change the status or add production in the *Firmed* or *Released* statuses.

Click the Process button to save the production schedule or production ID. The system then calculates the production start date, time, and shift.

Note. If capacity and material availability are concerns, estimate the production start and production due dates and shifts when you create or maintain production using PeopleSoft Manufacturing, and then schedule the production schedule's or production ID's production start and production due dates and shifts using PeopleSoft Supply Planning.

The Process button uses Remote Call for three-tier processing. Remote Call is a PeopleCode API function that provides a means of calling a Tuxedo service from a PeopleSoft application. A typical use of Remote Call is to run data-intensive, performance-sensitive programs near or on the database server. If you experience a time out or other error when adding or changing production information, use the Reschedule Production process.

Production Status Change and Effects

If you are changing production information, the production status determines what changes you can make:

Production Status and Action	System
If production is in the <i>In Process</i> status, and you increase or decrease the order quantity on the Detail page	Adjusts the component scheduled quantities to reflect the new order quantity and marks the production as changed so that the Planning Engine reschedules the operations during the next planning run.

Production Status and Action	System
If production is in the <i>Released</i> status and you change production information such as due time or production quantity on the detail page	Updates the component list and operation list with the new information.
If production is in the <i>Firmed</i> status and a routing is specified	Recalculates the production start date and production start shift. The actual start date and time and due date and time are also recalculated.

See Also

[Chapter 4, “Establishing Production Calendars,” page 45](#)

[Chapter 23, “Completing Operations and Recording Scrap,” page 521](#)

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items,” Managing Inventory by Item Status

PeopleSoft Managing Items 8.8 PeopleBook, “Working With Items,” Establishing Quantity Precision and Rounding Rules for Items

PeopleSoft PeopleTools PeopleBook: PeopleCode Reference

[Chapter 18, “Maintaining Production Orders and Production Schedules,” Rescheduling Production, page 429](#)

Defining and Viewing Production Details

Access the Production by Area Details page.

Production by Area Details

Unit:

Production Area:

Item ID:

Professional Road Bike, Womans

Prdn Due Date: Monday

Prdn Due Shift:

Start of Shift: 7:00AM End of Shift: 3:00PM

Compl Qty: 0.0000

Scrap Qty: 0.0000

Production

Find | View All First 1 of 1 Last

Rtg Itm	*Status	Due Time	Prdn Start Qty	UOM	BOM	Routing	Rev	☐ Frozen
MT2000	Entered	3:00PM	100.0000	EA	1	1		☐ Frozen Sub
Prdn Start Date	Prdn Start Shift	Start Time	Prdn End Qty	*Production ID	Prdn Type			
10/06/2003	1	3:00PM	100.0000	PRD00221	Production			

Production by Area Details page

Prdn Due Date (production due date), Prdn Due Shift (production due shift), Item ID, Prdn Start Date, and Prdn Start Shift (production start shift)	Enter values for these fields to retrieve production information.
Search	Click to display the selected production information.
Compl Qty (completed quantity)	Indicates whether assemblies have been completed to stock or routed to another production area.
Scrap Qty (scrapped quantity)	The system displays the number of assemblies that have been scrapped in process.
Insert button	Click to add new production quantities. Each quantity that you add in the Production by Area Details page will have the same Unit, Production Area, Item ID, Routing, Rtg Item (routing item), and Prdn Due Date (production due date). The system calculates the total Prdn Quantity (production quantity) for the Prdn Due Date or, on the Production by Area Summary page. You can only add production in the <i>Entered</i>, <i>Firmed</i>, and <i>Released</i> statuses, and you can delete <i>Entered</i>, <i>Firmed</i>, and <i>Released</i> schedules.
Rtg Itm (routing item)	The referenced item’s routing. The end item can either have its own unique routing or reference another item’s routing.
Status	When you change a status, if you are integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.
Due Time	The actual due date/time when production should be completed for the given production due date and production due shift.
Prdn Start Qty (production start quantity)	The beginning quantity at the <i>first operation</i> of the manufacturing process. The system will adjust this quantity to account for any operation yield.
Prdn End Qty (production end quantity)	The quantity <i>expected</i> at the end of the manufacturing process. The is the production quantity that you entered in the days of the week fields on the Production Area by Summary page.
	Click to Output List button to access the Production Output List page.

Production Status Change and Effects

Production Status and Action	Effect
<i>Firmed or Released</i>	System recalculates the component scheduled quantities taking into account any operation yield.
<i>In Process</i> and you increase or decrease the production start or production end quantity	System adjusts the component scheduled quantities (taking into account any operation yield) to reflect the new schedule quantity and marks the production as changed so that the Planning Engine reschedules the operations during the next planning run.
You decreased the production quantity and have already issued components	There might be a surplus of components at the WIP location.
You changed the production start or production end quantity and the production is released	System automatically recalculates the actual start date and time taking into account any operation yield.

See Also

[Chapter 14, “Structuring Routings,” Defining and Viewing Master Routings, page 298](#)

Viewing the Production Output List Page

Access the Production Output List page.

Output List Tab

Output Type Select either *Recycle* or *Waste* by-products.

Note. *Teardown* output items can only be used on Teardown production IDs.

Output Quantity Enter the production start quantity and indicate if whether this quantity is *Per Asy* (assembly) or *Ord* (order).

Note. You cannot change or add primary or co-products. However, you can change or add *Recycle* and *Waste By-products*.

Output Detail Tab

Output Schd Qty (output schedule quantity) Enter the values for the item being produced. Whether you enter a whole number or a decimal depends on the item’s unit of measure and quantity precision combination defined in PeopleSoft Inventory.

BOM and Routing codes Values appear and are automatically assigned from the BOM and routing code combination defined for the production area and item combination for regular production.

Because BOM and routing combination effectivity dates are defined at the area and item level, the BOM and routing combination appears by default based on the combination in effect on the due date of the schedule. Therefore, you can have multiple BOM and routing combinations for the same area and item combination and this has an impact on completions.

Note. Since production is always backward scheduled using these pages, the Prdn Due Date (production due date) is used to check the BOM and routing combination effectivity dates.

Prdn Start Date (production start date), **Prdn Start Shift** (production start shift), and **Start Time**

Fields indicate the actual date, shift, and time when production should begin.

- If a routing isn't defined for the production area and item, the actual start time defaults to the due date and due time. Change the start date and time as necessary.
- If a routing is defined for the production area and item, the system calculates the actual start date and time based on the item's routing and production start or production end quantity.

The actual due time automatically changes to the last minute of the specified shift using the calendars associated with the last operation. The last minute for the specified shift is based on the work center's calendar for the work center associated with the last operation in the item's routing. If not, the system uses the production calendar. If a production calendar doesn't exist, the system uses the shift for the five-day work week. Change the due time to any valid time that falls within the production due shift specified. If the shift spans multiple dates, the system determines the actual due date based on the production due date, production due shift, and actual due time specified.



Click the Process button to save changes to the production schedule. The system calculates the production start date, time, and shift.

Viewing Production Transaction History

Use the Production History page to track material and labor transactions associated with WIP as an end item makes its way through the shop floor. View production transaction history based on a business unit, production ID, or schedule and a date range or see all transactions recorded by a particular User ID. Within PeopleSoft Manufacturing, each operation or end item completion transaction is recorded with the date and time stamp as the end item moves through the shop floor.

You can review previously posted transactions and Navigate to the details of each transaction. You can also see where the completed assemblies are routed - either to an inventory storage location or to another production ID.

Common Element Used in This Section



Click the Item Search button to access the Item Search link to select a different item.

Pages Used to View Production Transaction History

Page Name	Object Name	Navigation	Usage
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history.
Production History Details (inquiry)	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View Production History details based on your selection criteria.

Viewing Production Transaction History Details

Access the Production History page.

Production History

*Business Unit:

US008

From Date/Time:

10/08/2003

12:00AM

Search

Production ID:

PRD00220

To Date/Time:

10/08/2003

11:59PM

☒ All Transactions

Production Area:

FINAL

User ID:

Item ID:

SR1001

Component ID:

Omega 500 Touring Bike

*Inquiries:

Component Consumption

5

1 to 1 of 1

Valid Productions

Customize | Find |

	Prdn ID	Area	Item ID	Description	Prdn Due Date	Prdn Due Shift	BOM Code	Routing Code
	PRD00220	FINAL	SR1001	Omega 500 Touring Bike	08/02/2000		1	1

Production History inquiry page

The type of production information that appears depends on the selection that you choose from the Inquiries values on the Production History page. View production transaction history for:

- Completions Detail
- Component Consumption
- Operation Detail

Selection Criteria Options

You have various ways to select production to be viewed using the Production History page. Narrow your selection by entering a From Date/Time and To Date/Time range with any of these options. For example, to view a production ID for a specific date range, enter a beginning date (From Date/Time) and an ending date (To Date/Time).

Production ID

Use to select a specific production ID. When you make this selection, the Production Area and Item ID are unavailable for selection, but the system displays the area and item associated with the production ID. If

you're selecting the *Completions Detail* for a single production ID, you automatically transfer to the Production History Details page.

Production Area	Use to select <i>all</i> production based on the production area. This includes both production IDs and production schedules for all items.
Item ID	Use to select all production schedules for a particular item in the area specified.
User ID	Use to select production recorded by a specific user.
Component ID	Use to view all production that uses this specific component. This field is only available when you select <i>Component Consumption</i> . If you want to view all component consumption usage, leave this field blank.
All Transactions	Select this option to view all transactions for the selected criteria.
Search	Click to retrieve the transaction history information based on your selection criteria.

Rescheduling Production

Reschedule selected production IDs or production schedules with a status of *Entered*, *Firmed*, *Released*, or *In Process*.

Pages Used to Reschedule Production

Page Name	Object Name	Navigation	Usage
Reschedule Production	SF_PRDN_RSCH_REQ	Production Control, Process Production, Release Production, Request Prdn Status Change	Reschedule selected production IDs or production schedules. Use this page to reschedule multiple production IDs and production schedules simultaneously. You must have defined at least one production ID or production schedule.
Production Selection	SF_PRDN_RELSE_REQ2	- Production Control, Process Production, Release Production, Request Prdn Status Change, Production Selection - Production Control, Define Production, Production IDs/Schedules, Reschedule Production, Production Selection	Define additional information for production that you want to reschedule. You must have defined at least one production ID or production schedule.

Defining Production to be Rescheduled

Access the Reschedule Production page.

Order Statuses

You can reschedule production with a production status of:

- Entered
- Firmed
- Released
- In Process

Start Date Range

Choose production for All dates or enter a Range of dates. Any production whose operation is due to start within the actual start date range specified is included.

Defining Additional Reschedule Production Criteria

Access the Reschedule Production - Production Selection page.

Report Request Parameters

Select Production IDs and Select Production Schedules

Indicate whether you want to reschedule production for a particular or a range of production IDs, production schedules, or all production types by selecting both check boxes.

Check Subcontracted Operations

Select to have the system to include production IDs with subcontracted operations.

Run

Click to run the Reschedule Production process (SFPCRSCH) at user-defined intervals.

CHAPTER 19

Maintaining Component Lists

This chapter provides an overview of component lists, and discusses how to create and maintain component lists after the system copies the bill of material (BOM) to production.

Understanding Component Lists

When the system releases production to the shop floor, it creates a component list for the production quantity specified and associates it with the production ID or production schedule. With the creation of a component list, PeopleSoft Manufacturing provides you with the ability to alter the BOM to accommodate item substitutions or configuration changes. You can also associate attachments with each component on the component list.

Once you define a production area/item combination and create a production ID or production schedule for an item, you can verify and change the production requirements before or after releasing production to the shop floor.

You can create a component list by:

- Manually changing a production ID or production schedule status from Entered to Firmed or Released or running the batch release process for a range of production IDs or production schedules. When the production status is changed to Firmed or Released for:
 - Regular production: The system copies the valid BOM in effect on the production due date or for the specified revision into the component list for the production ID or production schedule. For a configured end item, the component list is comprised of standard items as well as the options and features selected for the particular configuration. For this type of production, a component cannot be the same item ID as the item ID being produced. Floor stock and expensed items are displayed for informational purposes only.
 - Rework production for an item without a rework BOM: The system creates a component list with the reworked end item as the only component and assigns the Kit issue method. The scheduled quantity is the same as the production quantity. If additional material is needed to complete the rework, manually add the items to the component list using the Edit/Issue Components page. Additionally, if component requirements are known prior to the start of rework, you can specify those components using the Update Component List pages. This enables you to issue the additional components, along with the end item being reworked, using the Material Pick Plan. The system issues any additional components required for rework production using the issue method set for each item at the production area/item level.
 - Rework production for an item with a rework BOM: The system bases the component list on the rework BOM and automatically adds the reworked end item as a component and assigns the Kit issue method. For the reworked end item, the scheduled quantity is the same as the production quantity. For additional components on the rework component list, the system calculates the scheduled quantity based on the quantity per component and the rework production quantity.

- Teardown production: The system automatically adds the end item to be torn down as a component when the production is released and assigns the Kit issue method. You can't change or delete the end item, but you can add additional components if necessary. The scheduled quantity is the same as the production quantity. The system issues any additional components required for teardown production using the issue method set for each item at the production area/item level. These additional components can't be substituted. The scheduled quantity is the same as the production quantity.
- Processing new production recommendations for production IDs and production schedules from PeopleSoft Supply Planning in PeopleSoft Manufacturing.
- Recording an end item or production completion. If you specify a production schedule quantity or production ID quantity that still has a status of Entered or Firm'd during the completions and scrap reporting process, the system prompts to release the production and create the component list. The ability to release production during the completion process is dependent on your manufacturing business unit options.
- Adding a production schedule after you have completed manufacturing an item. When you add a production schedule quantity at the same time you are recording operations completions and scrap, the system automatically creates the production schedule, releases production, and creates the component list. After backflushing, components are consumed and costs are posted for the completed quantity.
- Running the production configuration process for a configured order. When the production ID for the configured item is created, the status is automatically set to Released, and the component list is created based on the options and features selected during the configuration process.

The component lists created differ depending on whether the component list is for regular, teardown, or rework production or for a configured item. For regular production, the system uses the end item's BOM to create the component list. For teardown production, the component list consists of the item you are tearing down, which is automatically issued using the Kit issue method. For rework production, the system bases the component list on the rework BOM if there is one and automatically adds the reworked end item as a component and assigns it the kit issue method. If a rework BOM doesn't exist, the system creates a component list with only the reworked end item as a component.

For a configured item, the component list is created using the options and features selected during sales order entry. You can modify either component list by adding new components, deleting existing components, or changing the quantity per assembly or per order, scheduled quantity, or component yield. You can't specify configured items as a component on a component list for a non-configured end item. Configured items can have other configured items as components. You can't change the rework or teardown end item on the component list.

This section discusses how to:

- Create component lists for regular production.
- Create component lists for rework production.
- Create component lists for teardown production.
- Modify the component list during the production process.

Creating Component Lists for Regular Production

To create a component list for regular production, the system copies the item's BOM. The component list defines the required components for the production quantity. You define which BOM to use for production by selecting the appropriate revision of the BOM or using the BOM in effect at the time production is due.

Note. Components that are supplied by an outside vendor aren't included when creating the component list. These components are marked as subcontractor-supplied on the item's BOM.

Note. Floor stock and expensed items are included on the component list for informational purposes only. Although the system calculates and displays a scheduled quantity, these items aren't included in any pick plan and therefore won't be issued to production during the material release process.

When creating the component list, the system determines the scheduled quantities and current scheduled quantities for each of the end item's components. Scheduled quantity is based on this formula:

$$[(\text{operation start quantity} \times \text{quantity per assembly}) / \text{component yield}]$$

The scheduled quantity is calculated based on the quantity of the end item started at the operation where the component is used. In addition, the system also initializes the components operation sequence and quantity per assembly or per order with information from the BOM. The components issue method defined for the end item within the production area is also defined at this time.

If you're adding a new component, the scheduled quantity will be calculated the same as when a production ID is created ($\text{operation start qty} \times \text{qty per assy} / \text{Component Yield}$).

If you're changing the scheduled quantity, then the system calculates the quantity per assembly: $\text{QPA} = (\text{current component scheduled qty} \times \text{component yield}) / \text{operation start qty}$. The operation start quantity factors in any planned yield loss or actual scrap that has occurred at prior operation sequences.

If you're changing the QPA, then the current scheduled quantity will be recalculated, using the operation start quantity at the operation sequence where the component is required.

See Also

[Chapter 8, "Maintaining Bills of Material," page 147](#)

Creating Component Lists for Rework Production

PeopleSoft Manufacturing creates the component list for rework production somewhat differently than for regular production. When the rework production ID is released, the system adds the end item being reworked to the component list, with a scheduled quantity the same as the production quantity. The system assigns the kit issue method to the end item being reworked. Additionally, if the end item being reworked has a rework BOM associated with the rework production ID, the system calculates the additional component requirements and adds them to the component list on the rework BOM. The system issues any additional components required for rework production using the issue method set for each item on the production area/item level. The issue method defaults from the Define Business Unit Item - Manufacturing page and can be overridden on the Production Area - Item Detail page. The operation sequence of the reworked end item is automatically set to 0. The operation sequence of the additional components reflects the operation sequence specified on the rework BOM. If you haven't predefined a rework BOM, you can add other components to the component list as needed to repair or rework the end item.

Creating Component Lists for Teardown Production

PeopleSoft Manufacturing creates the component list for teardown production by copying the item you are tearing down into the component list with a scheduled quantity the same as the order quantity. If additional material is needed to tear down the item, manually add those components to the component list. The issue method for the end item being torn down is automatically set to Kit. The system issues any additional components required for teardown production using the issue method set for each item at the Production Area/Item level. The issue method defaults from the Define Business Unit Item - Manufacturing page and can be overridden on the Production Area - Item Detail page.

Modifying the Component List

You can modify the component list after the release of the production ID—even if production is in process. If you have already consumed or issued components on the component list, you can’t delete those components from the production ID. However, you can:

- Add, change, or delete other components. However, for teardown or rework production, you can’t delete the teardown or reworked end item from the component list. Additionally, you can only add a configured item as a component if the end item is also a configured item.
- Change the operation sequence.
- Change component quantities.
- Indicate whether the component is issued per assembly or per order.
- Change the component yield.

When you modify a component list and if you are integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

In addition, you can also view and edit a limited number of components associated with a production ID or production schedule. Select a subset of components by using various filters. Use this when you do not want to select all the components associated with the production ID or production schedule.

See Also

- [Chapter 5, “Integrating with Third-Party Systems,” page 57](#)
- [Chapter 18, “Maintaining Production Orders and Production Schedules,” Manufacturing Execution System Integration, page 386](#)

Common Elements Used in This Section

Prdn ID (production ID)	The production order identifier.
Item ID	The name and description of the item being manufactured.
Config Code (configuration code)	A unique identifier for costing and inventory tracking purposes. The configuration code displays if the end item is a configured item.

Production Status	The current status of the production.
Production Area	The area where the item is being manufactured.
Prdn Type (production type)	The type of production being manufactured. Can be <i>Production</i> , <i>Rework</i> , or <i>Teardown</i> .
Op Seq (operation sequence)	The operation step where the component is added.
Prdn Start Qty (production start quantity)	The starting quantity for the production ID or production schedule at the beginning of the manufacturing process.
Prdn End Qty (production end quantity)	The quantity expected for the production ID or production schedule at the end of the manufacturing process.
Expected Yield %	The percentage that you expected for the production ID or production schedule at the end of the manufacturing process.
Component ID and Description	The name of the component being used in the selected production.
Source Cd (source code)	Valid source codes are <i>Make</i> , <i>Buy</i> , <i>Expensed</i> , or <i>Floor Stock</i> .

Maintaining Component List Information

This section discusses how to:

- Define component selection criteria.
- Select specific components.
- Maintain the component list summary.
- Make item substitutions.
- Maintain component detail.
- View component status information.
- Associate component documents
- Specify component attachments.
- Delete components from component lists.

Pages Used to Maintain Component Lists

Page Name	Object Name	Navigation	Usage
Update Component List - Production Selection	SF_COMP_MAINT_SEL	Production Control, Define Production, Production IDs/Schedules, Update Component List, Production Selection	Select a specific production ID or production schedule to add, change, or delete components when the production status is <i>Firmed</i> , <i>Released</i> , or <i>In Process</i> . Define at least one production ID or production schedule with a production status of <i>Firmed</i> , <i>Released</i> , or <i>In Process</i> .
Component List Selection	SF_SELECT_COMPS_SP	Click the Select Components link on the Update Component List - Production Selection page.	Select specific components to modify.
Update Component List - Summary: Summary	SF_COMP_MAINT_GRD	Production Control, Define Production, Production IDs/Schedules, Update Component List, Summary, Summary	Add, change, or delete components when the production ID or schedule status is <i>Firmed</i> , <i>Released</i> , or <i>In Process</i> .
Item Substitution	SF_COMP_MAINT_GRD_DET	Production Control, Define Production, Production IDs/Schedules, Update Component List, Summary, Summary Click the Item Search button next to the Component ID to access this page.	Display or change substitute items selected by PeopleSoft Planning, based on the criteria you specify.
Update Component List - Production Text	SF_COMP_PRDN_TEXT	Production Control, Define Production, Production IDs/Schedules, Update Component List, Summary, Production Text	Display or modify text associated with production.
Update Component List - Detail: Detail	SF_COMP_MAINT2	Production Control, Define Production, Production IDs/Schedules, Update Component List, Detail, Detail	View additional information for a component.
Update Component Detail	SF_COMP_MAINT2_SP	Production Control, Define Production, Production IDs/Schedules, Update Component List, Detail, Detail Click the Detail button.	View component detail activity at a summary level.

Page Name	Object Name	Navigation	Usage
Update Component List - Detail: Component Text	SF_COMP_TEXT	Production Control, Define Production, Production IDs/Schedules, Update Component List, Detail, Component Text	Associate or modify text with any component on a component list. For regular production, any component text from the BOM is copied along with the component at the time the component list is created.
Update Component List - Detail: Documents	SF_COMP_DC	Production Control, Define Production, Production IDs/Schedules, Update Component List, Detail, Documents	Associate, access, and manage pertinent component documents in the embedded document management system. You must have PeopleSoft Engineering installed to access this page.
Update Component List - Detail: Documents Details	DC_DOC_DETAILS_SP	Production Control, Define Production, Production IDs/Schedules, Update Component List, Detail, Documents Click the Detail button for the selected document.	View additional information about the selected document from the document vault. You must have PeopleSoft Engineering installed to access this page.
Update Component List - Detail: Attachments	SF_COMP_ATT	Production Control, Define Production, Production IDs/Schedules, Update Component List, Detail, Attachments	Associate attachments with your components. Any component attachments from the BOM, and not associated with phantom items, are copied along with the components at the time the component list is created.
Component List - Production Selection inquiry	SF_COMP_SELECTION	Production Control, Define Production, Review Production Information, Component List, Production Selection	Select the production ID or production schedule information to view a component list.
Component List - Summary: Summary inquiry	SF_COMP_LIST_GRD	Production Control, Define Production, Review Production Information, Component List, Summary, Summary	View a summary of the component list.
Component List - Summary - Production Text inquiry	SF_COMP_LIST_PRTXT	Production Control, Define Production, Review Production Information, Component List, Summary, Production Text	Display text associated with the production.

Page Name	Object Name	Navigation	Usage
Component List - Detail: Detail inquiry	SF_COMP_LIST2	Production Control, Define Production, Review Production Information, Component List, Detail, Detail	Display detail for a specific component.
Component List - Detail: Component Text inquiry	SF_COMP_LIST_TXT	Production Control, Define Production, Review Production Information, Component List, Detail, Component Text	Display text for a component.
Component List - Detail: Documents inquiry	SF_COMP_LIST_DC	Production Control, Define Production, Review Production Information, Component List, Detail, Documents	Display component documents for each component. You must have PeopleSoft Engineering installed to access this page.
Component List - Detail: Attachments inquiry	SF_COMP_LIST_ATT	Production Control, Define Production, Review Production Information, Component List, Detail, Attachments	Display component attachments for each component.
Comp Where Used Selection	SF_COMPWUSE_INQ	Production Control, Define Production, Review Production Information, Component Where Used in Prdn	Select the components you want to view.
Component Where Used List	SF_COMPWUSE_GRD	Production Control, Define Production, Review Production Information, Component Where Used in Prdn, Component Where Used List	View where components are used in production. Click the View Related Links button to access other pages to view additional component information such production details, item substitution, and operation details.
Component Selection report page	RUN_SFS2006	Production Control, Define Production, Reports, Component Where Used Report, Component Selection	Select the components for the Component Where Used in Production Report.

See Also

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2006 - Component Where Used in Production Report, page 674

Defining Component Selection Criteria

Access the Update Component List - Production Selection page.

Production ID	Select to view or maintain the component list for a specific production ID.
Production Area and Item	Enter values in both fields to view or maintain the component list for production schedules. The production schedule information is based on the start date of production or when production is due to be completed.
Select Components	Click this link to access the Component List Selection page to retrieve specific components.
Date Type	
Prdn Start (production start) and Prdn Start Date (production start date)	Select Prdn Start to view the production schedules which are or were due to begin on a specific production start date. Select the production start date for the production schedule. Scroll through the list until you find the specific production schedule you'd like to view.
Prdn Due (production due) and Prdn Due Date (production due date)	Select Prdn Due to view production schedules based on production due dates. Scroll through the list until you find the specific production schedule you'd like to view. Select the production due date for the production schedule.
Prdn Due Shift (production due shift) or Prdn Start Shift (production start shift)	Select a valid shift for the production schedule based on either when the shift ends or when the shift begins.
Note. If multiple production schedules exist for the production area/item/date/shift, then a warning displays followed by a listing of the production schedules from which you can select one production schedule to maintain.	
Search	Click the Search button to retrieve the information associated with the production ID or production schedule.

Selecting Specific Components

Access the Component List Selection page.

Component List Selection

Unit: US008

Production ID: PRD00230

Op Sequence Range

☒ All Op Sequences
 ☐ Range
 From Op Seq: To:

Component Range

☐ All Components
 ☐ Range
 From Comp ID: To:
☐ Description

☒ List of Components

Component List

[Customize](#) | [View All](#)

First

1-5 of 10

Last

Component ID	Description
FR7002	Bike Frame, Aluminium
FR7005	Front Fork
SR2001	Gear Subassembly

OK

Cancel

Component List Selection page

Op Sequence Range

All Op Sequences Select this option if you do not want to filter by operation sequence.

Range Enter a range of operation sequences.

Component Range

Select one of these options:

- All Components
- Range
- Description: Enter the words or strings included in the component's description. The system retrieves any component whose description contains the words or string that you enter in this field.

Note. The values for this field are case sensitive.

- List of Components: Select specific components to retrieve.

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Note. You can use both the Op Sequence Range and Component Range options to further filter your selection criteria.

Click OK to retrieve the selected components and access the Summary page.

Click Cancel to return to the Production Selection page.

Maintaining the Component List Summary

Access the Update Component List - Summary: Summary page.

Production SelectionSummaryDetail

SummaryProduction Text

Unit:US008

Prdn ID:MDS_PR1

Item ID:SR3001

Diablo 500 Touring Bike

☒ Serial in Prdn

Area:FINAL

In Process

Prdn Type:Production

☐ Print at Save

Prdn Start Qty:10.0000 EA

Prdn End Qty:10.0000 EA

Expected Yield %:100.0000

Setup Print Options

Component Summary

CustomizeFindView All1-6 of 10

Qty DataOther

	*Component ID	Description	Op Seq	Quantity	Std UOM	*Per	*Yield	Sched Qty
	FR7002	Bike Frame, Aluminium	10	1.0000	EA	ASY	100.0000	10.0000
	FR7005	Front Fork	10	1.0000	EA	ASY	100.0000	10.0000
	FR7012	Primer Paint	20	1.0000	GAL	ASY	100.0000	10.0000
	HB9002	Handlebar, Touring	20	1.0000	EA	ASY	100.0000	10.0000
	LT3007	Red Paint	20	1.0000	GAL	ASY	100.0000	10.0000
	LT5000	Standard Wheel Subassembly	20	2.0000	EA	ASY	100.0000	20.0000

Update Component List - Summary page: Qty Data tab

- Quantity

Number of components required based on per assembly or per order.
- Per

The component requirements are expressed as an amount per Asy (assembly) with a unit of 1, or per Ord (order), an amount regardless of the order size.
- Yield

Expected percentage of usable components within a batch of components issued to production. You can change the component yield here. If you change the yield, the system recalculates the schedule quantity for the component relating to this production only.
- Sched Qty (schedule quantity)

Number of components required for the batch production.

To calculate the scheduled quantity with a known quantity per assembly:
Scheduled Quantity = operation start quantity x [Quantity Per Assembly / (Component Yield / 100)]
- Sort Components by

Display components based on Component or Op Seq (operation sequence).

Print at Save	Select this check box if you want to print production documents at save time.
Setup Print Options	Click this link to access the Process/Output Options page to select different print criteria for the production documents.
Component Summary	
Component ID	Select an approved inventory item ID for the business unit. Keep these in mind when modifying the component list: • If a component for the item ID is designated as a phantom on the production BOM, the phantom item's components, and not the phantom item, will be listed here. The operation sequence associated with the phantom's components is set to the phantom's operation sequence. Note. If you need to add a phantom component to the component list, you must enter all of the items that make up the phantom component. • You can change any component to a different item ID, or add a new component. • Duplicate components can exist as long as the operation sequence and or quantity code are unique. • You can't change the component or delete the component on the component list once it has been kitted, consumed, or scrapped. • You can manually add a configured item to the component list only if the end item is itself a configured item. If you add a configured item, you must also specify the configuration code. • Floor stock and expensed items can be on the component list, but won't be issued, consumed, or included in any end item scrap costs. Note. You'll receive a warning message when adding a component or substitute component with an item status of <i>Hold</i>. Similarly, you will receive a warning message when a component on Hold is added to the component list or if the parent item is on Hold. When a substitute component is changed to Discontinue or when a discontinued component is added to the component list, you will receive a warning message. In all cases, the warning message won't prevent you from performing the action.
Item Search	Click to search for the item ID using various search criteria.
Item Availability	Click to determine whether the item you want to use is available.
Item Substitution	Click to display substitutes. If no substitutes exist for the component, this link is unavailable.
Op Seq (operation sequence)	Determines where in the manufacturing process that you need the components. PeopleSoft Manufacturing uses the work center associated with each operation, and the WIP location associated with each work center to determine where to deliver components. The component's issue method

in combination with the operation sequence determines when and where the material is delivered and how the system updates inventory in the WIP location or the issue quantity on the component list.

When the operation sequence is set to zero or an invalid operation sequence is specified, it is assumed that the component item will be used at the first operation. In this case, PeopleSoft Supply Planning uses the recorded completions and scrap at the first operation to calculate the correct kit component quantity on hand.

Quantity, Per, Sched Qty (scheduled quantity)

Indicate values for the components you're adding.

The system calculates the opposing quantity if either is left blank. If you are using Quantity Per, enter the quantity and then indicate whether the quantity required is per *Asy* (assembly) or per production *Ord* (order). The system calculates the scheduled quantity based on the quantity per, operation start quantity, the quantity code, and the component yield. When entering the scheduled quantity, PeopleSoft Manufacturing calculates the quantity per assembly based on the quantity entered and production quantity. If the quantity is per order, the quantity will be set to the scheduled quantity entered. The scheduled quantity must be greater than zero.

Note. For serial-controlled items, Quantity Per and Scheduled Quantity must be whole numbers.

Component Yield

The expected percentage of usable components within a group of components issued to production. If you know that components can be damaged during the issuing or end item process, you can account for that loss here. When adding a component, the component yield always defaults to 100%. Changing the yield inflates the scheduled quantity for the component. The system inflates the quantity required for production to account for expected scrap of the component. When entering yield, 95.6 represents 95.6%. If the component's quantity is based on quantity per order, the component yield must always be 100%.

Quantity Per Calculations

You can calculate the quantity per assembly or per order.

- To calculate the quantity per assembly with a known scheduled quantity:

$$\text{Quantity Per Assembly} = [(\text{Scheduled Quantity} / \text{operation start quantity}) \times (\text{Component Yield} / 100)] + .00005^*$$

*.00005 is used for rounding

- To calculate the quantity per order with a known scheduled quantity:

$$\text{Quantity Per Order} = \text{Scheduled Quantity}$$

Important! To provide greater accuracy when modifying component data, we don't require the Quantity field to follow the quantity precision rules defined for the item. A warning will be issued if you define a decimal quantity value for an item whose quantity precision value is a whole number.

Scheduled Quantity Calculations

You can calculate the scheduled quantity per assembly or per order.

- To calculate the scheduled quantity with a known quantity per assembly:

$$\text{Scheduled Quantity} = \text{Production Start Quantity} \times [\text{Quantity Per Assembly} / (\text{Component Yield} / 100)]$$

Note. The production start quantity in this calculation denotes the starting quantity required at the operation sequence associated with the component. If there is no operation sequence, then the production start quantity is the starting quantity of the production ID or production schedule.

- To calculate the scheduled quantity with a known quantity per order:

$$\text{Scheduled Quantity} = \text{Quantity Per Order}$$

Note. The format for the Scheduled Quantity on this page may be determined by the item's unit of measure and quantity precision combination that was defined in PeopleSoft Inventory.

Issue Method

When you set the component issue method to *Issue*, material is delivered to the work center WIP location. When you record end item completions for the operation, the components associated with that operation sequence are consumed from the work center's WIP location. At that point, the system decrements the quantity on hand in the WIP location and updates the issue quantity on the component list.

Components using the *Replenishment* method are handled in a manner similar to those using the *Issue* method. Material is delivered to the WIP location using the production replenishment pages as a result of a worklist notification.

When you record end item completions, the components associated with that operation sequence are consumed from the work center's WIP location. At that point, the system decrements the quantity on hand in the WIP location and updates the issue quantity on the component list.

If you are using PeopleSoft Flow Production, you can also replenish your WIP locations directly from an inventory location, feeder line, or vendor using Kanban Cards or online replenishment requests.

When you use the Kit component issue method, the operation sequence is just a reference for the material handler. Kitted material is delivered to the work center tied to the operation sequence, but the system charges the material directly to the production ID upon issue. The material isn't issued to the work center's WIP location, nor consumed when the operation is completed. The system updates the issue quantity on the component list when the material is released to production.

When you add a new component to the component list, the operation sequence defaults to zero. A component with an operation sequence of zero means the component will be used at the first operation. If an invalid operation sequence has been specified on the end item's BOM, the system will assume it will be used at the first operation.

For the phantom item's components, the system assigns the phantom's operation sequence to all of its components.

If an invalid operation sequence has been specified on the end item's BOM, or the operation sequence is set to zero, the system will issue the components to the production area's WIP location. Owned components will only be issued to owned WIP locations. Likewise, non-owned components will only be issued to non-owned WIP locations.

Serial Control

The Serial Control check box is a display-only field that indicates if the component is serial-controlled.

Teardown

The Teardown check box designates the component as a potential teardown output. This value is copied from the BOM Component detail page. If a production ID is selected as the basis for a teardown order, the components designated as teardown will be considered the outputs from the teardown production.

Substitute

The Substitute check box designates that a substitution has already taken place. This value is copied from the Component List Substitution detail page.

Manufacturing Execution System (MES) and Component Lists

When you modify a component list, if you are integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

See Also

[Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 672](#)

[Chapter 18, "Maintaining Production Orders and Production Schedules," page 371](#)

PeopleSoft Managing Items 8.8 PeopleBook, "Working With Items," Managing Inventory by Item Status

PeopleSoft Flow Production 8.8 PeopleBook, "Understanding the Flow Production Process"

Making Item Substitutions

Access the Item Substitution page.

Item Substitution

Orig Comp ID: GR8000 **Std UOM:** EA
 Gear, Sugishita

Prdn Start Qty: 10.0000 EA **Prdn Due Date:** 10/29/2003

Prdn End Qty: 10.0000 EA **Orig Sched Qty:** 10.0000

Quantity: 1.0000 **Per:** ASY **Yield:** 100.0000

Substitute Items								
Customize Find View All [Grid Icon] First 1-2 of 2 Last								
Sel	Priority	Substitute Item ID	Description	Conversion Rate	Required Qty	Std UOM	From Date	To Date
☐		GR8000	Gear, Sugishita	1.00000000	10.0000	EA		
☒	1	GR8001	Gear, Campani	1.00000000	10.0000	EA	01/01/2000	12/31/2099

OK Cancel

Component List Item Substitution inquiry page

Substitute Items

This page displays the original component and a list of valid substitutes for the original component. PeopleSoft Supply Planning selects the component based on the criteria you selected.

Sel (select)

Use this option to manually override the Supply Planning component selection.

OK

Click to return to the component list Summary page where your substitution selection displays.

Substitute

This option is selected when the component is a substitute.

Orig Comp ID (original component ID) and
Description

The values are display only. A difference between the Component ID and Original Component ID indicates a substitution has taken place.

Maintaining Component Detail

Access the Update Component List - Detail: Detail page.

Production Selection		Summary		Detail	
Detail Component Text Documents Attachments					
Unit:	US008	☒ Serial in Prdn	Area:	FINAL	Prdn Start Qty: 10.0000 EA
Prdn ID:	PRD00222			In Process	Prdn End Qty: 10.0000 EA
Item ID:	SR3001		Prdn Type:	Production	Expected Yield %: 100.0000
	Diablo 500 Touring Bike				Sort Components by: Component

Component Detail		Find View All		First 1 of 10 Last	
*Component ID:	FR7002	Issue Method:	Issue		
	Bike Frame, Aluminium				
Op Seq:	10	Source Code:	Buy	☐ Non-Owned	
Quantity:	1.0000 1.0000000000	Std UOM:	EA	☐ Teardown	
*Per:	Asy	Sched Qty:	10.0000		
Orig Comp ID:	FR7002	*Yield:	100.0000	Trace Usage: None	
	Bike Frame, Aluminium				

Update Component List - Detail: Detail page

Component Details

This page summarizes the activity of the component for the production ID or production schedule.

Orig Comp ID (original component ID)

Values display if this component is a substitute item. The issue method for the component also displays. There are several component issue methods: *Production Issue*, *Production Kit*, and *Production Replenishment*.

Source Cd (source code)

Values are *Make*, *Buy*, *Expensed*, or *Floor Stock*.

Sched Qty (current scheduled quantity) and Yield

Fields are display only, but you can change this information.

Quantity

Page displays the calculated quantity per assembly or per order. The system calculates the quantity per by dividing the quantity per assembly by the bill of material's BOM quantity. You designate the level of precision for the calculated quantity per in the manufacturing installation options page.

Config Code (configuration code)

Code displays if the item is configured. If you add a configured item to the component list, you must add the configuration code here.

Note. For serial-controlled items, Quantity Per and Scheduled Quantity must be whole numbers.

Non-Owned Item

This option indicates that the component is supplied by your customer or is a consigned item. Approved consigned items can be added to component lists.

Teardown

Designates the component as a potential teardown output. This value is copied from the BOM Component Detail page.

See Also

PeopleSoft Product Configurator 8.8 PeopleBook, “Working With Configuration Codes”

PeopleSoft Inventory 8.8 PeopleBook, “Managing Consigned Inventory”

Viewing Component Status Information

Access the Component Details page.

Pending Issue Qty (pending issue quantity)	The quantity used based on the quantity completed at the operation multiplied by the quantity per assembly. If the component’s quantity is expressed as per order, this is the per order quantity. The per order quantity is completely consumed at the first backflush. This quantity hasn’t yet been consumed from the WIP location due to material shortages.
Yield Loss Qty (yield loss quantity)	The quantity that was scrapped during the end item process and consumed from the WIP location.
Issue Qty (issue quantity)	For components using the <i>Issue</i> or <i>Replenishment</i> material issue method, this is the quantity consumed from the WIP location for the component and was charged to work in process. For components using the <i>Kit</i> method, this is the quantity issued directly to the production ID.
Pending Yield Loss Qty (pending yield loss quantity)	The quantity of components that was scrapped during the end item process but not yet consumed from the WIP location due to material shortages.
Pending Pick Quantity	The quantity that is awaiting issue to the WIP location or to the production ID to satisfy the scheduled component requirement. The pick plan has already been generated for these components but they haven’t yet been reviewed and released to production.

Associating Component Documents

Access the Update Component List - Detail: Documents page.

Production SelectionSummaryDetail

[Detail](#)[Component Text](#)[Documents](#)[Attachments](#)

Unit:US008Serial in PrdnArea:FINALPrdn Start Qty:10.0000 EA

Prdn ID:MDS_PR1In ProcessPrdn End Qty:10.0000 EA

Item ID:SR3001Diablo 500 Touring BikePrdn Type:ProductionExpected Yield %:100.0000

Component DetailFind | View AllFirst1 of 10Last

*Component ID:FR7002Bike Frame, Aluminium

Op Seq:10Std UOM:EASource Code:Buy

DocumentsCustomize | Find | View All | First1 of 1Last

Sel	Document Name	Title	Fixed
☐			N

Update Component List - Detail: Documents page

Note. You must have PeopleSoft Engineering installed before you can access this page.

By using the Documentum Component Options page, you control the document management buttons displayed in this page.

Component Details and Documents

The system displays all the documents associated with this component list, including the Document Name and Title, and whether the document is Fixed or not. When you fix an associated document to a page, a specific version of the document is “permanently” associated with the page.

- View Document Detail
- Query the Documentum Database
- View Document Contents
- Launch Documentum
- Edit Documents in the Documentum Database
- Checkout/Checkin Documents from the Vault; Cancel the Checkout/Checkin
- Fix/Unfix Versions
- Copy Links

See Also

PeopleSoft Engineering 8.8 PeopleBook, “Managing Documents”

Specifying Component Attachments

Access the Detail - Attachments page.

- Component ID and Op Seq**
(operation sequence)

Enter values that you want to associate with the component.
- File Ext** (file extension)

Select the type of media you want to attach to the component.
- Document ID and Description**

Specify the file name and description of the item.
- 

Click the Attachments button to launch the multimedia object attached to the component.

Deleting Components from the Component List

When deleting components, the system checks to see if material was issued to the location associated with the component’s operation sequence, if material was consumed during a backflush, or if material was issued using a production kit. A warning message displays if material was issued to the location. If material was consumed during a backflush, issued directly to the production ID, or an inventory picking plan has already been created for the component, the system won’t allow you to delete the component. To delete the component, reverse the backflush, unconsume or dekit the component, and then delete it.

CHAPTER 20

Maintaining Operation Lists

This chapter provides an overview of operations lists and discusses how to modify them after the routing has been copied to production.

Understanding Operation Lists

When the system releases production to the shop floor, it freezes the item's routing for the production quantity specified and copies it to the operation list. In addition, you can also modify the operation list to take into account known capacity constraints for machines that may be unavailable.

The operation list documents the operations necessary to manufacture, rework, or teardown the assembled item. The system creates the operation list by copying the routing to production. During the manufacturing process, it may be necessary to add operations, delete operations, or change an operation's work center, queue time, intransit time, production time, or the actual start and end date of the operation.

You can create operation lists for both production IDs and production schedules using PeopleSoft Manufacturing. Operation lists are automatically created for regular production. For rework production, the system creates an operation list using a rework routing if one exists. If you haven't created rework routings, you have the option to manually create an operation list. For teardown production, you can base the operation list on a teardown routing or optionally, manually create an operation list.

See Also

[Chapter 14, "Structuring Routings," page 281](#)

Creating Operation Lists

You can create an operation list for regular production by:

- Accepting planning messages and converting planned orders into firm or released production IDs or production schedules.
- Changing the production status from Entered to Firm or Released. When production has a status of *Firm* or *Released*, the system copies a routing into its associated operation list. The system uses the Master Routing Option defined for the item to determine which routing to copy. The end item can have either its own routing or can reference another item's routing, the routing of the item assigned to its item group or to its item family.
- Recording a completion for the production quantity. When you specify a production ID that has a status of *Entered* or Firm during the completions and scrap reporting process, upon request, the system releases the production, and creates the operation list for Entered production. Releasing production IDs when recording completions and scrap is dependent on how you've set up your PeopleSoft Manufacturing business unit options. You can only record completions for a production

schedule with a status of Firm or Released. If the production schedule is Entered, you must change the status to Firm or Released before recording completions.

- Adding a production schedule after you have completed manufacturing an item. When you add a production schedule quantity at the same time you're recording operation completions and scrap, the system automatically creates the production schedule, releases production, and creates the component and operation lists. After backflushing, components are consumed, operations are recorded as complete, scrap is recorded, and costs are posted for the completed quantity.
- Running the production configuration process for a configured order. When the production ID is created for the configured item, the operation list is created based on the tasks selected during sales order entry.

PeopleSoft Manufacturing creates an operation list for rework production using a rework routing, if it exists. If you want to create an operation list for reworked items that don't have rework routings, you must manually enter the scheduling information. For teardown production, the system uses a teardown routing for the operation list. Or, manually create your own operation list, and manually enter the start date and due date. If you're using PeopleSoft Supply Planning and material and capacity constraints are concerns, you'll want to use the Optimizer to schedule rework and teardown production based on the operation list you created.

When the system creates the operation list, it copies the routing along with its details to production. Routing details include the operation sequences, count points, attachments, and all the planning and costing times, such as queue time, intransit time, and run rates, associated with each operation. The system displays the item whose routing is copied. When the end item utilizes a master routing, the copied routing can be that of another item, the one assigned to the end item's family or to its item group. If an item references a master routing, it also uses the reference routing item's rework routing if one exists. At the same time, it determines each operation's start and due date based on the start or due date of the production ID or production schedule. If PeopleSoft Supply Planning isn't installed, the system also takes into account setup, operation overlap, and the possibility of simultaneous setup and queue. As assemblies are completed at each operation, PeopleSoft Manufacturing tracks the quantity issued to the operation, as well as the quantity completed and scrapped at each operation.

You can modify the operation list using the Update Operation List components. You may add, delete or change operations if end item completions, scrap, or earning of setup costs haven't occurred at the operation. You may change existing operations by modifying standard production times, tasks, or work centers.

If you're maintaining production schedules using the PeopleSoft Supply Planning solver, the production of one or more of the operations may have a frozen status. The frozen status indicates that a decision was made to hold or firm up the production ID, production schedule, or operation's due date and that changes within PeopleSoft Manufacturing could result in a change to the schedule created by PeopleSoft Supply Planning. If the production or operation has a frozen status, and you change information that impacts the actual start or due dates/times, PeopleSoft Manufacturing displays a warning message indicating that the operation or production is frozen. You have the option to continue or cancel your changes. If you proceed with changing the operation or production, the operation or production is no longer frozen.

When you modify an operation list and if you're integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

See Also

Chapter 13, "Maintaining Tasks," page 269

Chapter 1, "Getting Started with PeopleSoft Manufacturing," page 3

Taking Subcontracted Operations into Consideration

If you use outside vendors to perform an operation, set up and maintain your routing and operation list to take this into consideration. A subcontracted operation can be defined when setting up a task, a work center, an operation on a routing, or when creating or maintaining an operation list.

When you specify that an operation will be performed by a subcontractor, also select a preferred vendor for performing the work. If you don't select a preferred vendor, PeopleSoft Purchasing uses autosourcing to determine the vendor.

If you're creating or maintaining a subcontracted operation, keep in mind that:

- Any production with one or more subcontracted operations on the operation list must be tracked using a production ID.
- If you're using count points, all subcontracted operations must be defined as a count point.
- You must copy the routing to production during release. Select the Copy Routing to Production check box on the Routing header to ensure the routing is copied to production during the release process.
- You can specify only labor planning and costing operation times.
- You can't generate multiple outputs such as co-products or by-products at subcontracted operations.

See Also

[Chapter 14, "Structuring Routings," Defining Routing Header Information, page 287](#)

Common Elements Used in This Chapter

Production Area	Area where the item is being manufactured.
Item and Description	Name and description of the item being manufactured.
Config Code (configuration code)	Unique identifier for costing and inventory tracking purposes. The configuration code displays if the end item is a configured item.
Production Status	Current status of the production.
Prdn ID (production ID)	Production order identifier.
Sch Method (scheduling method)	Scheduling method used to manufacture the item. Can be <i>Forward</i> or <i>Backward</i> .
Prdn Type (production type)	Type of production being manufactured. Can be <i>Production</i> , <i>Rework</i> , or <i>Teardown</i> .
Prdn Start Qty (production quantity)	The quantity required at the beginning of the production process. This quantity will be inflated to account for any operation yield if the system calculates the <i>beginning</i> production quantity.
Prdn End Qty (production end quantity)	The quantity expected at the end of the production process. This quantity will be rounded down to account for any operation yield if the system calculates the <i>ending</i> production quantity.

Source Cd (source code)	Code indicates if the production is <i>Make</i> or <i>Buy</i> .
Routing Code	Routing code associated with the selected production.
Rtg Item (routing item)	Item that the referenced item's routing is based.
Frozen	Check box indicates if the production is frozen by PeopleSoft Supply Planning.
Op Seq (operation sequence)	Operation step where the process occurs.
Work Center	Work center location where the operation step and/or tasks are performed.
Operation Start Date	Date the operation step is/was due to begin.
Start Time	Time the operation step is/was due to begin.
Operation Due Date	Date the operation step is/was due to be completed.
Due Time	Time the operation step is/was due to be completed.
Calculate Yield and Reschedule	If you change the work center, task, operation sequence, or one or more operation type or time, click this link to update the schedule.

Maintaining Operation List Information

PeopleSoft Manufacturing copies the routing, if one exists, for the end item or its reference routing to the production ID or production schedule when the status of the production ID or production schedule changes from *Entered* to *Firmed* or *Released*. In addition, it also copies the routing or its reference routing when an end item or operation completion is recorded for the production quantity.

This section discusses how to:

- Select operation lists.
- Maintain the operation list summary.
- Maintain operation times.
- Maintain operation resources.
- Associate conversion cost codes with an operation.
- Maintain operation scheduling.
- Display operation list summary information.

Pages Used to Maintain Operation Lists

Page Name	Object Name	Navigation	Usage
Production Selection	SF_OP_MAINT_SEL	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Production Selection	Select a specific production ID or production schedule to add, change, or delete operations when the production status is <i>Firmed</i> or higher.
Summary - Summary	SF_OP_SUMMARY	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Summary, Summary	Add, change, or delete operations on the operation list.
Summary - Production Text	SF_OP_PRDN_TEXT	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Summary, Production Text	Display or modify text associated with the production ID or production schedule.
Summary - Production Detail	SF_OP_PRDN_HDR	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Summary, Production Detail	Display production ID or production schedule detail.
Detail - Times	SF_OP_TIME	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Times	Review or modify an operation's labor or machine planning queue and intransit times as well as planning and costing, setup, run, fixed run, and post production times/run rates.
Detail - Times	SF_OP_TIME	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Times	Review or modify an operation's labor or machine planning queue and intransit times as well as planning and costing, setup, run, fixed run, and post production times/run rates.
Detail - Operation Text	SF_OP_TEXT	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Operation Text	Add or modify text associated with the production.
Detail - Documents	SF_OP_DC	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Documents	Associate, access, and manage pertinent operation documents in the embedded document management system. You must have PeopleSoft Engineering installed to access this page.

Page Name	Object Name	Navigation	Usage
Detail - Attachments	SF_OP_ATT	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Attachments	Associate attachments with an operation. The attachment associations may have been previously defined when creating or maintaining the routing.
Detail - Resources	SF_OP_RESOURCE	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Resources	Review or modify the resources assigned to each operation on the operation list.
Detail - Conv Cost Codes	SF_OP_CONCOST	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Conv Cost Codes	Add, change, or delete conversion cost codes for an operation.
Details - Scheduling	SF_OP_SCHED	Production Control, Define Production, Production IDs/Schedules, Update Operation List, Details, Scheduling	Maintain operation scheduling options. Several scheduling options can be selected for operations, including simultaneous setup and queue, planning intensity, and operation overlap.
Production Selection inquiry	SF_OP_SELECTION	Production Control, Define Production, Review Production Information, Operation List, Production Selection	Select the production ID or production schedule to view an operation list.
Summary - Summary (inquiry)	SF_OP_LIST	Production Control, Define Production, Review Production Information, Operation List, Summary, Summary	View operation list information for selected production.
Summary - Production Text Inquiry	SF_OP_LIST_PRTXT	Production Control, Define Production, Review Production Information, Operation List, Summary, Production Text	Display text associated with the production ID or production schedule.
Detail - Operation Text (inquiry)	SF_OP_LIST_TEXT	Production Control, Define Production, Review Production Information, Operation List, Detail, Operation Text	Display text associated with the operation.
Detail - Documents	SF_OP_LIST_DC	Production Control, Define Production, Review Production Information, Operation List, Detail, Documents	Display operation documents for each operation. You must have PeopleSoft Engineering installed to access this page.

Selecting Operation Lists

Access the Production Selection page.

Production ID	Select a value if you want to maintain the operation list for a specific production ID.
Production Area and Item	Select values if you want to maintain the operation list for production schedules.
Date Type	Production schedule information can be based on the start date of production or when production is due to be completed.
Prdn Start (production start)	Select this option if you want to view production schedules based on the Prdn Start Date (production start date).
Prdn Due (production due)	Select this option if you want to view production schedules based on the Prdn Due Date (production due date).
Prdn Due Shift (production due shift)	Select a valid production shift.

Note. If multiple production schedules exist for the production area/item/date/shift, then a warning displays followed by a listing of the production schedules from which you can select one production schedule to maintain.

Search Click this button retrieve the information associated with the selected production.

Maintaining the Operation Summary

Access the Summary - Summary page.

Production Selection
Summary
Details

Summary
Production Text
Production Detail

Unit: US008 Released
Area: FINAL
Item ID: MT3000

Prdn ID: PRD00234
Prdn Type: Production
Prdn Start Qty: 5.0000
Prdn End Qty: 5.0000

Source Cd: Make
Frozen:
UOM: EA
Expected Yield %: 100.0000
Sch Method: Backward

Rtg Itm: MT3000

Routing Code: 1

Calculate Yield and Reschedule

Sort Operations by: Op Seq
Print at Save
Setup Print Options

Operation Summary
Customize | Find | View All |
First 1-4 of 5 Last

Details
Yield By Operation
Other

	*Op Seq	Task Code	Description	Yield %	Assy Starts Qty	Exptcd Cmpl Qty		
	10	FORK	Add Fork	100.0000	5.0000	5.0000	+	-
	20	FINAL	Final Assy	100.0000	5.0000	5.0000	+	-
	30	INSP	Proc Insp	100.0000	5.0000	5.0000	+	-
	40	SUB-1	Sub Paint	100.0000	5.0000	5.0000	+	-

Update Operation List - Summary: Summary page: Yield by Operation tab

Sort Operations by	Select <i>End Date</i> , <i>Op Seq</i> (operation sequence), or <i>Start Date</i> .
Print at Save	Select this check box if you want to print production documents at save time for a particular production ID.
Setup Print Options	Click this link to access the Process/Output Options page to select different print criteria for the production documents.
Calculate Yield and Reschedule	When inserting, changing, or deleting an operation, use this link to recalculate the operation quantities and start and due dates. You will be given the option of maintaining the existing start or end quantity and recalculating the other.
Details Tab	Select the Details tab.
Op Seq (operation sequence)	Add, change, or delete operations (tasks) on the operation list. You can also change the operation sequence) by renumbering the operations. You can't delete an operation from the operation list once completions or scrap have been recorded for the operation. Note. You can't delete a subcontracted operation if a purchase order has been created.
	Click the Add button to add a new operation sequence. The operation can be added in any order. The operations are reordered when you click the Save button.
Task Code and Description	Task being performed at the operation step. Select a value if tasks have been predefined in PeopleSoft Manufacturing. Task codes are optional but do facilitate data entry.
Work Center	If no task code is entered, you must select the Work Center where the new operation will take place. Note. Changing the Task Code can affect the task times, resources, scheduling options, conversion rates, and the Work Center. Changing either task information or the work center may result in process change variances in production. Production variances occur any time the cost of the operation differs from the cost of the operation used to determine the item's standard cost.
Operation Start Date or Operation Due Date	Changing these values automatically reschedules prior and subsequent operations. To change an operation's Start Time (if forward scheduled) or Due Time (if backward scheduled), select the operation to be changed and the appropriate time based on the production ID's scheduling method. If you're changing the operations for a production schedule, only change the Due Time because all production schedules are backward scheduled.

The scheduling method of the production ID or production schedule displays in the Operation Summary header.

Note. The system uses the production start quantity of an operation to calculate the scheduled quantities in the component list.

For multiple output production IDs, the system uses the production end quantity of the last operation to calculate the quantities for the primary products and co-products in the output list. For by-products, the system uses the production end quantity of the last operation.

For multiple output production schedules, the system uses the production end quantity of the last operation to calculate the quantities for the primary, co-products, and by-products in the output list.

Note. Changing the production quantity may require the operation start or due dates to change.

CalculateYield and Reschedule

Click this link to see the impact of a date/time or work center change. This recalculates the operations based on the changes made. Using this button without saving the page allows you to create what-if scenarios for the production ID or production schedule.

If you add an operation to the first row of the operation list, the start date/time defaults to the production ID or production schedule start date/time, even when the production ID is backward scheduled. If the production is backward scheduled, the system automatically recalculates the start date/time once you enter the due date/time.

If you change the work center for an operation and the current start date/time or due date/time doesn't fall within the hours of operation for the work center, the system reschedules the date/time to a valid date/time once you click the Calculate Yield and Reschedule link. Valid date/times are based on the work center calendar if a calendar code has been associated with it. If not, the valid working days are based on the run time production calendar. If one isn't specified, the system assumes a five-day work week with the valid hours of operation based on the shift code specified for the five day work week.

Note. If capacity and material availability are concerns, estimate the start and due dates/times when you create or maintain an operation using PeopleSoft Manufacturing, and then optimize the operation's start and due dates/times using PeopleSoft Supply Planning.

Important! Change operation list dates one at a time. When one of the dates is changed, the remaining date/time fields are unavailable. To change multiple operations, select the first operation to be changed, input your changes, then click the Reschedule button. Once the system reschedules all operations, select the next operation to be changed and continue.

Save

If you want to save the results of the recalculation, make sure you click this button before exiting the page.

Yield by Operation Tab

Select the Yield by Operation tab.

Yield %

The percent you expect at this operation sequence. The default value is defined on the routing which is used on the production ID, but you can change the percentage here. If you change the percentage, the system will adjust the starting and ending quantities at all subsequent operations. In addition, the operation start and due times may change.

Note. This percentage cannot be changed once any completions or scrap process has been performed against the production ID.

Assy Starts Qty (assembly starts quantity)

The beginning quantity required at the beginning of the operation. This is the ending quantity of the *previous* operation. This amount will account for any operation yield loss during the production process.

Expctd Cmpl Qty (expected completed quantity)

The quantity that you expect to complete at the end of the operation. This is the *current* operation's beginning quantity. This amount will account for any operation yield loss during the production process.

Other Tab

Select the Other tab.

Sub (subcontracted)

Select this option if the operation is being sent to an outside vendor. A subcontracted operation can be defined when setting up a task or a work center, or you can specify it here. Keep these in mind when creating or maintaining subcontracted operations:

- You can select or clear the subcontracted check box as long as the purchase order for the subcontracted operation hasn't been created.
- You can't change the work center or task from a work center or task that is subcontracted to one that isn't, once a purchase order for the subcontracted work has been created.
- You can't change the operation sequence if a purchase order for the subcontracted work has been created.
- You can change the operation scheduling if a purchase order for the subcontracted work has been created. However, if the operation scheduling changes affect when the subcontracted work is received back from the vendor, the system sends a purchase order change request to PeopleSoft Purchasing, indicating a change in scheduling for the production ID.
- If you're using count points, all subcontracted operations must be defined as a count point. In addition, the last operation step must be a count point.
- You can't have teardown outputs at subcontracted operations.

Count Point

Select this option if you want to define an operation step as a count point. Count points allow you to record completions at predefined operation steps. Material is consumed and labor and overhead will be earned back to the previous count point.

Frozen

Select this option to freeze this operation. If you've set up the Automatic Freeze Planning Option for your business unit, the system automatically flags any operation sequences as frozen if processing has begun and you've recorded any of these transactions for that operation: actual hours, operation completions, operation scrap, setup complete, by-product or co-product completions. The system won't automatically freeze an operation if you've recorded material consumption (issue, kit, or edit components) unless you've also recorded completions for that operation. You have to clear the Frozen check box if you don't want the In Process or Complete production operation to be frozen.

Also, if you select the Frozen check box on the production ID or production schedule, all operations for that order are frozen. You can also manually change this option here.

Manufacturing Execution System (MES) and Operation Lists

When you modify an operation list, if you're integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

See Also

[Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 672](#)

[Chapter 13, "Maintaining Tasks," page 269](#)

[Chapter 12, "Defining Work Centers," page 251](#)

[Chapter 23, "Completing Operations and Recording Scrap," Recording End Item Completions Using Count Points, page 541](#)

Maintaining Operation Times

Access the Details - Times page.

Production Selection		Summary		Details	
Times Operation Text Documents Attachments Resources Conv Cost Codes Scheduling					
Unit:	US008	Released	Prdn ID:	PRD00234	Source Cd: Make
Area:	FINAL		Prdn Type:	Production	Frozen: ☐
Item ID:	MT3000		Prdn Start Qty:	5.0000	UOM: EA
	Mountain Bike, Womans		Prdn End Qty:	5.0000	Expected Yield %: 100.0000
Rtg Itm:	MT3000		Routing Code:	1	Sch Method: Backward
Calculate Yield and Reschedule					

Operation Detail					
Find View All First 1 of 5 Last					
*Op Seq:	10	Sub ☐			
Task Code:	FORK	Add Fork	Start Dt/Time:	09/03/2003	9:23PM
*Work Center:	FI-ASSY	Final Assy	Due Dt/Time:	09/03/2003	9:38PM
☐ Continuous Scheduling			☐ Ignore Capacity		

Times						
Customize Find View All First 1-2 of 4 Last						
*Type	Op Time	Time Unit	Op Rate	Rate Unit	Inc. Setup	
Planning Labor Run	3.00	Minutes			☐	+ -
Planning Machine Run	3.00	Minutes			☐	+ -

Update Operation List - Details: Times page

Op Seq (operation sequence), **Task Code**, **Work Center**, **Start Dt/Time** (start date and time), and **Due Dt/Time** (due date and time)

These values default from the Operation Summary page, although you have the option to change them here.

If you change the task, the system deletes all task-related information defined for the operation including work center, resources, task times, and scheduling options. The system then adds the new task information to the current operation sequence. If conversion rates are defined at the task level, the system replaces the conversion and conversion overhead rates with the new rates.

If completions or scrap for this operation was recorded, the Op Seq (operation sequence), Task Code, and Work Center fields are unavailable.

You can change the Work Center if you haven't recorded completions or scrap for this operation sequence. If you change the work center, the system deletes the resources associated with the old work center and adds the new work center resources. If conversion rates are defined at the work center level, the system replaces the rates with the new rates.

Sub (subcontracted)

This option is selected if the operation is subcontracted. If the subcontracted operation was defined at the task level, the vendor information defaults from the task information. You also have the option of selecting a vendor, if a vendor isn't specified, or overriding the default. If you don't select a vendor, PeopleSoft Purchasing uses autosourcing to select a vendor for the purchase order.

Note. You can specify only labor times for a subcontracted operation.

Calculate Yield and Reschedule

If you change the work center, task, or operation sequence, click this link to update the schedule.

If you want to save the results of the recalculation, click the Save button before exiting the page.

Operation Type (operation times or run rates)

These values default from the routing information. These times and rates may have originated from the task, if one is specified, and modified for this particular item. If a task wasn't specified, the times and rates were entered on the routing for the end item. You can modify the planning labor and machine times or rates for fixed run, post production, run, and setup. If a task was specified for the operation, change any of the production times or rates for the task without affecting the master task information.

To make changes to the master task, update the operation times and rates using the Task Time page in PeopleSoft Manufacturing.

If you're changing the operation costing times and run rates, the change may result in process change variances in production. This occurs when the cost of the operation differs from the cost used to determine the standard cost of the end item. If you're changing the operation from a regular task to a subcontracted one, you can't select machine times or rates for the operation.

Op Time (operation time), or
Op Rate (operation rate)

You can modify these values. Use operation rates for run times only.

- If you enter an operation time, you can use *Days*, *Hours*, or *Minutes* for the Time Unit field. For example, if you entered 5 in the Op Time field and *Days* in the Time/Rate Unit field, then one unit will be completed every five days for the operation. Setup, fixed run, and post production must be expressed in terms of operation times. Run is defined in terms of operation time or a run rate.
- If you enter an operation rate, you can use *Units/Day*, *Units/Hour*, or *Units/Minute* in the Rate Unit field. For example, if you entered 3 in the Op Rate field and *Units/Day* in the Time/Rate Unit field, then three units will be completed every day for the operation. You can only use operation rates to define run times.

Inc. Setup (include setup)

Select this option when calculating operation lead times and can only be selected for the *Planning Labor Setup* and *Planning Machine Setup* operation types. The check box isn't available for selection for all other operation types. The system always includes setup in the lead time calculation for the first operation. If this option isn't selected, setup can physically begin prior to any production units arriving at the work center. However, the system calculates the start date/time of the operation to reflect the latest time the setup should begin to meet its due date/time.

Save

Click this button if you want to save the results of the recalculation.

Warning! Queue and intransit planning times as well as setup and post-production planning and costing times are allowed for subcontracted operations. If you're using PeopleSoft Supply Planning, queue, and intransit times are ignored.

Costing Considerations

To calculate costs for a given item/operation/time type, you must have a corresponding costing rate type defined along with a frozen conversion or

conversion overhead rate or cost. For example, if you had a costing labor fixed run time defined for an item, you should also have defined a labor fixed run rate per hour or per unit within PeopleSoft Cost Management for the conversion code specified on the operation list.

Costing Operation Time Type

Include a corresponding value if you intend to cost the operation using a fixed amount per unit, as opposed to a rate per hour.

The costing operation time can represent the amount of time to complete the task and the system uses it to calculate earned hours. However, the system uses the amount per unit in calculating the cost, regardless of the time specified. If you don't specify a costing time, the system won't include the per unit cost even if there's a rate defined for the code assigned to the operation.

Maintaining Operation Resources

Access the Details - Resources page.

Production Selection		Summary		Details																															
Times Operation Text Documents Attachments Resources Conv Cost Codes Scheduling																																			
Unit:	US008	Released	Prdn ID:	PRD00234	Source Cd: Make																														
Area:	FINAL		Prdn Type:	Production	Frozen: ☐																														
Item ID:	MT3000		Prdn Start Qty:	5.0000	UOM: EA																														
	Mountain Bike, Womans		Prdn End Qty:	5.0000	Expected Yield %: 100.0000																														
Rtg Itm:	MT3000		Routing Code:	1	Sch Method: Backward																														
Calculate Yield and Reschedule																																			
Operation Detail Find View All First 1 of 5 Last																																			
*Op Seq:	10		Start Dt/Time:	09/03/2003	9:23PM																														
Task Code:	FORK	Add Fork	Due Dt/Time:	09/03/2003	9:38PM																														
*Work Center:	FI-ASSY	Final Assy																																	
Crew Size:	1.00		Machine Resources:	1.00																															
<table border="1"> <thead> <tr> <th colspan="6">Resources</th> </tr> <tr> <th colspan="6">Customize Find View All First 1-2 of 2 Last</th> </tr> <tr> <th>Resource</th> <th>Crew/Machine/Tool</th> <th>Description</th> <th>Status</th> <th>Qty Used</th> <th></th> </tr> </thead> <tbody> <tr> <td>Crew</td> <td>ASSY01</td> <td>Assembly Crew 1</td> <td>Available</td> <td></td> <td>+ -</td> </tr> <tr> <td>Machine</td> <td>FINAL01</td> <td>Final Assembly Equipment 1</td> <td>Available</td> <td></td> <td>+ -</td> </tr> </tbody> </table>						Resources						Customize Find View All First 1-2 of 2 Last						Resource	Crew/Machine/Tool	Description	Status	Qty Used		Crew	ASSY01	Assembly Crew 1	Available		+ -	Machine	FINAL01	Final Assembly Equipment 1	Available		+ -
Resources																																			
Customize Find View All First 1-2 of 2 Last																																			
Resource	Crew/Machine/Tool	Description	Status	Qty Used																															
Crew	ASSY01	Assembly Crew 1	Available		+ -																														
Machine	FINAL01	Final Assembly Equipment 1	Available		+ -																														

Update Operation List - Details: Resources page

When maintaining the operation list, you can optionally define the crews, machines, and tools that will be used at work centers to perform specific tasks. In addition, keep these in mind when maintaining operation resources:

- You cannot associate resources with a *Pending* status to an operation.
- You can have no more than one primary crew, one primary machine, and one primary tool associated with each operation.
- You cannot assign crews or machines to a subcontracted operation.

Op Seq (operation sequence), **Task Code**, **Work Center**, **Start Dt/Time** (start date and time), and **Due Dt/Time** (due date and time)

These values default from the Operation Summary page, although you have the option to change them. If you change the task, the system deletes all task-related information defined for the operation including work center, resources, task times, and scheduling options. The system then adds the new task information to the current operation sequence. If conversion rates are defined at the task level, the system replaces the conversion and conversion overhead rates with the new rates.

Calculate Yield and Reschedule

If you change the work center, task, or operation sequence, click this link to update the schedule. If you want to save the results of the recalculation, click the Save button before exiting the page.

Crew Size, Machine Resources, and Resource Types

You can change the costing resource attributes (Crew Size and Machine Resources). These attributes default from the work center. Crew size is the number of people at the work center. The Machine Resources field is the number of machines at the work center. The system uses both the crew size and machine resources to determine the standard cost of an item. Therefore, if you're changing the operation's crew size or machine resources, the change may result in process change variances for the production ID.

For each operation, the resource information defaults from the resources associated with the work center you assigned to the task, and therefore the operation. Only the primary crew, machine, and tools are copied to the operation list. You can enter additional resources (crews, machines, and tools) by selecting a Resource type and the specific Crew/Machine/Tool. The resource's Description, Status, and, when the resource is a tool, the Qty Used (quantity used) displays. The resource must already be defined as a primary or alternate resource for the work center. You can also assign resources without assigning a task to the operation.

Associating Conversion Cost Codes With an Operation

Access the Details - Conv Cost Codes page.

Production Selection		Summary		Details	
Times Operation Text Documents Attachments Resources Conv Cost Codes Scheduling					
Unit:	US008	Released	Prdn ID:	PRD00234	Source Cd: Make
Area:	FINAL		Prdn Type:	Production	Frozen: ☐
Item ID:	MT3000		Prdn Start Qty:	5.0000	UOM: EA
	Mountain Bike, Womans		Prdn End Qty:	5.0000	Expected Yield %: 100.0000
					Sch Method: Backward
Rtg Itm:	MT3000		Routing Code:	1	Calculate Yield and Reschedule

Operation Detail		Find View All		First 1 of 5 Last	
*Op Seq:	10				
Task Code:	FORK	Add Fork		Start Dt/Time:	09/03/2003 9:23PM
*Work Center:	FI-ASSY	Final Assy		Due Dt/Time:	09/03/2003 9:38PM
Conversion Code:	4402	Assembler			
First Conversion Ovhd Code:	6501	Assembly			
Second Conversion Ovhd Code:	6505	Administration			
Third Conversion Ovhd Code:	6506	Support			
Fourth Conversion Ovhd Code:					

Update Operation List - Detail: Conv Cost Codes page

Conversion cost codes determine the labor, machine, outside processing, and overhead cost of the operation. When defining your costs, you associate a conversion rate or cost to each conversion code. The code is then entered on the task or work center, depending on the manufacturing installation options. The system then associates the corresponding rates with the operation when it copies the task or work center to the routing or operation list.

Conversion Code

The associated values with the operation's work center display if you're maintaining conversion rates at the work center level.

Conversion Ovhd Codes (conversion overhead codes)

To view the actual labor, machine, outside processing and overhead rates or costs assigned to the code, see the Conversion Code and Conversion Overhead Code pages for the task or work center.

To change the labor, machine, or overhead cost for a specific operation, select a new conversion code to determine the new labor and machine costs. You can also select up to four codes that calculate the overhead costs associated with the operation.

Note. If you change the Conversion Code or the Conversion Ovhd Codes (conversion overhead codes), and the rates associated with the new codes differ from the old ones, the change results in cost variances for the production ID or production schedule quantity.

Maintaining Operation Scheduling

Access the Details - Scheduling page.

Production Selection		Summary		Details	
Times Operation Text Documents Attachments Resources Conv Cost Codes Scheduling					
Unit:	US008	Released	Prdn ID:	PRD00234	Source Cd: Make
Area:	FINAL		Prdn Type:	Production	Frozen: ☐
Item ID:	MT3000		Prdn Start Qty:	5.0000	UOM: EA
	Mountain Bike, Womans			Prdn End Qty:	Expected Yield %: 100.0000
Rtg Itm:	MT3000		Routing Code:	1	Sch Method: Backward
Calculate Yield and Reschedule					
Operation Detail Find View All First 1 of 5 Last					
*Op Seq:	10		Start Dt/Time:	09/03/2003	9:23PM
Task Code:	FORK	Add Fork	Due Dt/Time:	09/03/2003	9:38PM
*Work Center:	FI-ASSY	Final Assy			
Intensity:	Longest		☐ Subcontracted		
			☐ Count Point		
Operation Overlap					
Op Overlap:	No Overlap				

Update Operation List - Details: Scheduling page

Op Seq (operation sequence), **Task Code**, and **Work Center**

These fields are unavailable if completions or scrap for this operation have been previously recorded.

Simultaneous Setup and Queue

Select this option if setup can occur during the queue time of an operation. If you select this option, the system considers the longer of the two times when determining actual production start or due dates.

Note. The Simultaneous Setup and Queue check box isn't available if the page is displaying the first operation in a routing, if setup isn't included for the operation, or if you're using PeopleSoft Supply Planning.

Subcontracted

This option is selected if the operation is being performed by a vendor. This check box is display-only; if you want to select or clear the check box, use the operation Summary - Summary page or Operation Detail - Times page to change the subcontracted status.

Count Point

This option is selected if the operation sequence is a count point. This field is display-only and defaults from the Summary page. Count points allow you to record completions at predefined operation steps. Material will be consumed and labor and overhead will be earned back to the previous count point. Count points are optional, and are used only on production IDs.

Frozen Operation

Displays if the operation has been frozen by PeopleSoft Supply Planning. This check box indicates that a decision was made to hold or firm up the due date and that changes to the operation could result in a change to the operation's start and due dates and times. If the operation is frozen, and you change information that impacts the start/due dates and times, PeopleSoft

Manufacturing displays a warning message indicating that the operation is frozen. You have the option to continue or cancel your changes. If you proceed with changing this information, the operation is no longer frozen.

Intensity

This value defaults from the task and determines the basis of your scheduling. The start and due date of the operation can be based on either the operation's *Labor Time* (labor intensive) or *Machine Time* (machine intensive).

Alternatively, the start and due date can be based on the *Longest* (longest of the two times, evaluated for each time type within the operation). For example, if labor setup is 7 minutes, machine setup is 10 minutes, labor run is 20 minutes, machine run is 25 minutes, labor fixed run is 11 minutes, and machine fixed run is 7 minutes, the total operation time would be Machine Setup (10) + Machine Run (25) + Labor Fixed Run (11) = 36 minutes. Or, the start and due date can be based on the *Cumulative* (the sum of the Machine and Labor Time).

Make sure that you select an intensity that matches the resource used. For example, if you select Machine Time, you must be using machines to perform all or part of the operation and machine times or rates should have been specified for setup, run, and/or fixed run.

Op Overlap (operation overlap)

Values include:

- *No Overlap*: No operation overlap.
- *Percentage* (percentage): If you select this option, the Overlap % (overlap percentage) field appears. This is the percentage of processing time remaining at one operation before the next operation can start. An overlap percentage of 100% means that the next operation can start at the same time as the current operation. An overlap percentage of 5% means that 95% of the operation must be completed before the next can start. Operation overlap can't be less than 0 or more than 100% and there can be no overlap on the last routing operation sequence or prior to a subcontracted operation. However, the vendor can send the end item back in multiple shipments. Therefore, you can define operation overlap for a subcontracted operation.
- *Send Ahead*: An overlap by a specific quantity completed at the operation. If you select this option, the Send Ahead field appears. In this case, enter the number of units that need to be accumulated or finished before they can be sent to the next operation and the next operation can begin. The send ahead quantity must be a positive number. Whether you can enter a whole number or a decimal may depend on the item's unit of measure and quantity precision combination that was defined in PeopleSoft Inventory. For example, if Item ID A0007 has a unit of measure of EA and a Natural Round, Whole number combination, then you can only enter whole numbers. If you enter an incorrect number format, you'll receive an error message.

The default setting for Op Overlap is *No Overlap*. If you select No Overlap, the Send Ahead and Overlap % fields aren't available for input.

Important! If an operation has a fixed run rate assigned to it, the preceding operation can't have a send ahead quantity assigned to it because fixed run operations assume the entire quantity is available at the beginning of the run. For example, operation 1 can't have a send ahead quantity assigned if operation 2 has a fixed run time.

Displaying Operation List Summary Information

Access the Summary - Summary inquiry page.

Operation Summary

The system displays the operation list, along with operation details for each operation sequence. Operation details include:

Quantity Issued to Operation	The quantity completed at the prior operation. In the case of the first operation, it is the production quantity completed and scrapped at the first operation.
Quantity Completed and Thru Oper (quantity completed and through operation)	The quantity completed at the operation. This quantity doesn't include any scrapped assemblies.
Qty Scrapped (quantity scrapped)	The total number of assemblies scrapped at the operation.
Scr Pct (scrap percentage)	A weighted average of the scrap percent complete specified when recording end item completions and scrap. This percentage represents the amount of run time earned and scrapped for the particular operation.

CHAPTER 21

Releasing Production and Changing Production Statuses

This chapter describes how to:

- Release production.
- Change production statuses, including reversing production statuses.

Understanding Releasing Production and Changing Production Statuses

Releasing production to the shop floor is the first step in the production process. You can release production for production IDs when maintaining production or release production independently of the maintenance process. You can also release production when you record an operation or end item completion. Following the production release process, you can also generate production documents for production IDs and dispatch lists for production IDs and production schedules.

When you change the production status to *Released*, production is sent to the shop floor and is available to start manufacturing the order. When you change an order's status, there can potentially be other implications to the order.

When you change the status to *Released* and if you're integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

This section discusses how to:

- Release production to the shop floor.
- Reverse production statuses.

Releasing Production

Before you can generate a picking plan and begin production, you must first release production for any production IDs or production schedules in the *Entered* or *Firmed* status. To accomplish this, you need to change the status for production IDs or production schedules from *Entered* or *Firmed* to *Released*.

Note. You must create rework or teardown production IDs with a status of *Released* unless the production is scheduled for the future, in which case you can create *Firmed* rework or teardown production IDs. PeopleSoft Manufacturing doesn't support rework or teardown production schedules.

You have several options when releasing production to the shop floor:

- Releasing a production ID during production ID maintenance.

When manually adding a production ID, you have the option of setting the status to *Released*. You can also change the status of an existing production ID from *Entered* or *Firmed* to *Released*.

- Releasing individual production IDs independently of the production ID maintenance process.

Use this method when you want to separate the release function from the maintenance function. Using this method gives control to selected individuals who determine when production should be released. If you intend to create picking plans and kit, pick, or pull components to the shop floor, you must release production prior to generating pick plans.

To release production IDs independently of the production ID maintenance process, use the Production ID Status Change page.

- Releasing individual production schedules prior to the start of production.

Use this method when you want to release production schedules. If you intend to create picking plans and pick or pull components to the shop floor, you must release production prior to generating pick plans.

To release production schedules, use the Production Schedule Status Change page.

- Releasing multiple production IDs or production schedules as a batch.

Use this method when you want to release multiple IDs or production schedules simultaneously. You can release a range of production IDs or production schedules, or a range of items or production areas.

To release multiple production IDs or production schedules, use the Production Status Change Process page.

- Releasing production by recording an operation or an end item completion.

Use this method when you're utilizing a streamlined production operation. If you are using production IDs, you can record completions at an operation or at end item completion. If you are using production schedules, you can backflush only at end item completion. When you perform a completion or backflush, the production ID or production schedule is automatically released. This method assumes that you are automatically replenishing components in the WIP locations and aren't generating pick reports.

To release production while recording an operation or an end item completion, use the Record Completions and Scrap page. The ability to release production when recording completions or scrap is dependent on how you've configured your environment when setting up your PeopleSoft Manufacturing business unit options.

See Also

[Chapter 19, "Maintaining Component Lists," page 431](#)

[Chapter 20, "Maintaining Operation Lists," page 451](#)

Reversing Production Statuses

Besides releasing production, you can also use the Production ID Status Change page and Production Schedule Status Change page to change an order's status from Entered, Firmed, Released, or In Process to a prior status. This applies to production, rework, and teardown orders.

To change an order from In Process to a prior status, you need to reverse all end item completions and scrap, return components to stock, and reverse all actual hour recordings. These include:

- Component Issues
- Component Yield Loss
- Pending Issues
- Pending Loss Quantities
- Operation Completions
- Co and By-Products Completions
- End Item Completions
- End Item Scrap
- Outstanding Bar Code Transactions
- Earned Costs
- Scrap Costs
- Actual Hours

Common Elements Used in This Chapter

Production ID	The production order identifier.
Production Status	Current status of the production.
Production Area	Area where the end item is generated.
Item	The end item being manufactured.
Production Type	Type of production being manufactured: <i>Production</i> , <i>Rework</i> , or <i>Teardown</i> .
Prdn Start Date/Shift (production start date/shift)	Actual production start date and shift that production is/was to begin for the production schedule.
Prdn Due Date/Shift (production due date/shift)	Actual production due date/tine that production is/was to be completed for the production schedule.
Start Date/Time and Due Date/Time	Actual production start date/time and due date/time for the production ID.
Production Qty (production quantity)	Quantity of end item to be manufactured.

BOM and Routing codes	Codes that designate the BOM and routing used to manufacture the end item.
Rtg Itm (routing item)	The routing the end item is using. The end item can be using its own routing or the routing designated for its family or item group.
Config Code (configuration code)	Code displays if the end item is configured. This code is used with production IDs only.
Revision	If the item is revision controlled, the code that determines which BOM is being used when producing the item.

Changing Production ID Statuses

This section discusses how to use the Production Status Change components to release production or change production statuses for production IDs.

Pages Used to Release Production or Change Production Statuses for Production IDs

Page Name	Object Name	Navigation	Usage
Production ID Status Change	SF_PRDN_STATUS_MA	Production Control, Process Production, Release Production, Change Production ID Status	Release or change the production status of a single production ID. If you didn't release production during the creation or maintenance of the production ID, use the Production ID Status Change page to change the status of a production ID from <i>Entered</i> or <i>Firmed</i> to <i>Released</i> . You can also use this page to change a production ID from <i>In Process</i> to a prior status. You must define at least one production ID.
Release Production Selection	SF_PRDN_RELSE_REQ	Production Control, Process Production, Release Production, Request Prdn Status Change	Change the production status and release multiple production IDs and production schedules. Define at least one production ID or production schedule with a status of <i>Entered</i> or <i>Firmed</i> .
Production Selection	SF_PRDN_RELSE_REQ2	Production Control, Process Production, Release Production, Request Prdn Status Change, Production Selection	Use to define additional production status change and release criteria.

Page Name	Object Name	Navigation	Usage
Dispatch List Selection	RUN_SFS2002	Production Control, Process Production, Release Production, Print Dispatch List, Dispatch List Selection	Use to generate a dispatch list. Define at least production ID or production schedule.
Production Selection - Report	RUN_SFS2002B	Production Control, Process Production, Release Production, Print Dispatch List, Production Selection	Define additional production criteria for the dispatch list.
Print Production Documents	RUN_SFS2003	Production Control, Process Production, Release Production, Print Production Documents	Use to print production documents for selected production IDs. Define at least one production ID.
Dispatch Inquiry - Selection	SF_DISP_LIST_SEL	Production Control, Process Production, Release Production, Review Dispatch List, Selection	Select all scheduled tasks for a work center by a particular date or range of dates that you'd like to view. Production IDs must have a production status of either <i>Released</i> or <i>In Process</i> .
Dispatch Inquiry - Results	SF_DSP_LIST_GRD	Production Control, Process Production, Release Production, Review Dispatch List, Results	Display the requested dispatch list information.

See Also

[Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2002 - Dispatch List, page 671](#)

[Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2003 - Production Documents, page 672](#)

Changing Production ID Statuses

Access the Production ID Status Change page.

Production ID Details

When no Revision is specified, the system uses either the start or due date (based on the BOM Explosion date option in the Manufacturing definition page) of the production for determining the bill of material used for producing the item.

To release production, change the Production Status from *Entered* or *Firmed* to *Released*.

Click the Save button to run the release process.

Note. You can't change rework or teardown production IDs back to the *Entered* status.

Click the Save button to run the production status change process.

If you have reversed all transactions for an *In Process* production ID, you can change it to a prior status such as *Entered*, *Firmed*, or *Released*. If you change the status back to *Firmed* or *Released*, no changes to the operation or component list are made.

You can also set the production ID's status back to *Entered* from *Released*. In this instance, the system deletes the production ID's component list and operation list. If you set the status to *Firmed*, the system doesn't delete the component list and operation list but will update the status.

When you change the status of a released production ID, if you are integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

See Also

[Chapter 8, "Maintaining Bills of Material," page 147](#)

[Chapter 18, "Maintaining Production Orders and Production Schedules," page 371](#)

Changing Production Schedule Statuses

This section discusses how to use the Production Status Change components to release production or change production statuses for production schedules.

Pages Used to Release Production or Change Production Statuses for Production Schedules

Page Name	Object Name	Navigation	Usage
Production Schedule Status	SF_PRDNSCH_STAT_MA	Production Control, Process Production, Release Production, Change Prdn Schedule Status, Prod Sched Status Change	Change the status of a single production schedule from <i>Entered</i> or <i>Firmed</i> to <i>Released</i> . If you don't release the schedule as you're adding it, you can release it here. You can also use this page to change a production schedule from <i>In Process</i> to a prior status. You must define at least one production schedule.
Release Production Selection	SF_PRDN_RELSE_REQ	Production Control, Process Production, Release Production, Request Prdn Status Change, Request Prdn Status Change	Change the production status and release multiple production IDs and production schedules. Define at least one production ID or production schedule with a status of <i>Entered</i> or <i>Firmed</i> .

Page Name	Object Name	Navigation	Usage
Production Selection	SF_PRDN_RELSE_REQ2	Production Control, Process Production, Release Production, Request Prdn Status Change, Production Selection	Use to define additional production status change and release criteria.
Dispatch List Selection	RUN_SFS2002	Production Control, Process Production, Release Production, Print Dispatch List, Dispatch List Selection	Use to generate a dispatch list. Define at least production ID or production schedule.
Production Selection - Report	RUN_SFS2002B	Production Control, Process Production, Release Production, Print Dispatch List, Production Selection	Define additional production criteria for the dispatch list.
Print Production Documents	RUN_SFS2003	Production Control, Process Production, Release Production, Print Production Documents	Print production documents for production IDs with a production document status of Ready to Print, reprint production documents, or print production documents for the specified production IDs regardless of the production document print status.
Dispatch Inquiry - Selection	SF_DISP_LIST_SEL	Production Control, Process Production, Release Production, Review Dispatch List, Selection	Select all scheduled tasks for a work center by a particular date or range of dates that you'd like to view. Production schedules must have a production status of either <i>Released</i> or <i>In Process</i> .
Dispatch Inquiry - Results	SF_DSP_LIST_GRD	Production Control, Process Production, Release Production, Review Dispatch List, Results	Display the requested dispatch list information.

See Also

[Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2002 - Dispatch List, page 671](#)

[Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2003 - Production Documents, page 672](#)

Changing Production Schedule Statuses

Access the Production Schedule Status page.

Production Schedule Detail

When no Revision is specified, the system uses either the start or due date (based on the BOM Explosion date option in the Manufacturing definition page) of the production for determining the bill of material used for producing the item.

To release production, change the Production Status from *Entered* or *Firmed* to *Released*. If the change was from *Entered* when you save this page, the system creates the end item's component list and operation list by copying the item's bill of material and routing. Additionally, the routing operations start and due dates and times are calculated. Also, this change enables you to make manual changes to the output list, if desired. If the change was from *Firmed*, only the status is updated, and the operation, component, and output lists are unchanged.

If you have reversed an *In Process* production schedule, you can change it to a prior status such as *Entered*, *Firmed*, or *Released*. If you change the status back to *Firmed* or *Released*, no changes to the operation, component, or output lists are made. You can also set the production schedule status back to *Entered* from *Released*. In this instance, the system deletes the production schedule's component list and operation list, and manual changes to the output list are no longer allowed. If you set the status to *Firmed*, the system doesn't delete the component list and operation list but will update the status.

You can also set the production schedule's status back to *Entered* from *Firmed* or *Released*. In this instance, the system deletes the production schedule's component list and operation list. In addition, the output list is regenerated and can't be manually maintained.

When you change the status of a released production schedule, if you are integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

Changing Production Statuses and Releasing Multiple Production IDs and Schedules (SFPARELS)

Access the Release Production Selection page.

Report Request Parameters

Enter a Request ID and select the business Unit.

Current Status and Convert Production To

In the Current Status group box, select whether your current production is *Entered* or *Firmed*, and whether you want to change the production status from:

- *Entered* to *Firmed*
- *Entered* to *Released*
- *Firmed* to *Released*

Note. You can't use the Production Status Change process to reverse orders and change them to prior statuses. Use the Production ID Status Change page or Production Schedule Status Change page to change production to prior statuses.

Number of Days Out

Enter the Number of Days Out for the production status change. This number indicates the beginning date and the number of days into the future. The default is zero (0)—the current system date. For example, enter 0 in both the beginning and to fields if you want to change production with the current system date. If you want to change *Entered* production to *Released* beginning 1 day from the current system date and 3 days into the future, enter 1 in the beginning field and 3 in the to field.

Note. Any production considered to be past due will be assumed to start on the current system date. Therefore, you must enter 0 in the beginning Number of Days Out field to include past due production information.

Inc Past Due

Select the Inc Past Due (include past due) check box to include all production of that status with a due date earlier than the early fence in your selection criteria.

Note. You can only select the Inc Past Due check box with one of the Entered rows.

Defining Additional Production Status Change and Release Criteria

Access the Release Production - Production Selection page.

Select Production IDs	Enter values to change the production status and release production for one or more production IDs by indicating a combination of one or more of these values: • Prdn ID (production ID) • Prdn Area (production area) • Item ID
Select Production Schedules	Enter values to change the production status or release production schedules. You can select the production schedules you want to change by selecting All or a Range of production schedules based on: • Prdn Area (production area) • Item ID
Start Date Range	This field is used with the production selected. For example, you can change the production status and release a specific production ID, all production for a specific item, or production for a specific item that's due to start within the date range specified.
Run	Click to run this request. Process Scheduler runs the Production Release (SFPARELS) process at user-defined intervals.

Manufacturing Execution System (MES)

When you perform this transaction changing production order statuses, if you are integrating to a third-party Manufacturing Execution System (MES), PeopleSoft Manufacturing uses the Production Order Update EIP to publish a message to the MES with the transaction information. The MES then subscribes to that message and updates the MES information.

CHAPTER 22

Issuing Material to Production

This chapter provides an overview of component issue methods, and describes how to move components to the shop floor by:

- Using the Issue method.
- Using the Kit method.
- Using the Replenishment method.
- Creating and processing picking plans.
- Replenishing WIP locations.
- Processing kit issues and returns.
- Processing component de-kits.
- Issuing material using electronic data collection.
- Processing picking plans using electronic data collection.
- Processing kit issues and returns using electronic data collection.

Understanding Component Issue Methods

After releasing production, you need the right components to manufacture the item on the shop floor. You have multiple ways to get the material there: you can stock components in the WIP locations, you can issue material directly to a production ID, or you can move the components to the shop floor when material is needed at a work center. You can also move material to production using electronic data collection.

You can issue material to production in the same manner that you control your component items. In some instances, you may want only a fixed quantity to be sitting out on the shop floor, especially when space is a constraint. In addition, there may be some items that don't need to be allocated to specific orders or a production run. In this case, you'll want to keep components on hand in the WIP locations to fulfill this need. PeopleSoft Manufacturing supports three methods of issuing components to the shop floor: Issue, Kit, and Replenish.

You define the issue method for each component of an end item at the production area/end item level. Define the issue method by selecting one of these:

Issue

Use this method to generate a picking plan and issue material directly from inventory to the operation's work center for all components. When you select this option, all the components for the end item are issued using this method.

Kit	Use this method to generate a picking plan and issue material from inventory directly to a production ID. During the picking process, the components are assembled into batches or kits. When you select this option for regular production, all the components for the end item are issued using this method. For rework and teardown production, the end item to be reworked or torn down is issued using the kitting method. The system issues any additional components required for rework or teardown production using the issue method set for each item on the Production Area/Item level. This issue method defaults from the Define Business Unit Item - Manufacturing page and can be overridden on the Production Area - Item Detail page.
Replenish	Use this method to stock all of the components for the end item in the WIP locations. The system doesn't generate pick plans for component requirements. However, the system uses the Replenishment Notification workflow to notify a defined role when the quantity on hand in the WIP location falls below a minimum stocking quantity. When you select this option, all components for the end item are managed using replenishment. If you're using PeopleSoft Flow Production, and your issue method is replenish, you can also replenish your WIP locations directly from an inventory location, feeder line, or vendor using Kanban cards or online replenishment requests.
Component's Method	Use this method when you want to mix the method of issuing components. With this selection, you can issue some of the components using the Issue method, some using the Kit method, and others using the Replenish method. In this case, you'll use the component's method defined using the Define Business Unit Item pages.

Note. Quantities of an item that are stored in a nettable, available WIP location and reserved for production use aren't available for other purposes.

See Also

PeopleSoft Flow Production 8.8 PeopleBook, “Understanding the Flow Production Process”

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Defining Manufacturing Information for an Item

Chapter 17, “Setting Up Production Areas,” Defining Production Area and Item Detail, page 367

Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649

Common Elements Used in This Chapter

Production ID	The production order identifier.
Production Area	The production area identifier where the manufacturing process occurred.
Item ID	The item and description of the item being manufactured.
Prdn Type (production type)	The type of production being processed: <i>Production</i> , <i>Rework</i> , or <i>Teardown</i> .

Start Date	The date the production is/was due to begin.
Due Date	The date the production is/was due to be completed.
Component Issue Methods	Select <i>Issue</i> , <i>Kit</i> , or <i>Replenish</i> .
Prdn Start Qty (production start quantity)	The quantity required at the beginning of the production process. This quantity will be rounded up to account for any operation yield if the system is calculating the production start quantity based on the production end quantity.
Prdn End Qty (production end quantity)	The quantity expected at the end of the production process. This quantity will be rounded down to account for any operation yield if the system is calculating the production end quantity based on the production start quantity.
Serial in Prdn	This display-only check box indicates if serial genealogy information will be captured for this production ID.
Trace Usage	This field indicates if serial or lot genealogy will be captured for the component ID. If the component's trace usage is serial or lot and the assembly's Serial in Prdn option is selected, then genealogy information will be captured. Values could be serial, lot or None. Values are <i>Serial</i>, <i>Lot</i>, or <i>None</i>.

See Also

[Chapter 16, “Using Serial Genealogy in PeopleSoft Manufacturing.” page 335](#)

Using the Issue Method

Use this method to issue components for a defined period of production. When using the issue method, you'll generate a picking plan that specifies certain parameters for picking components. For example, do you want the system to recommend the location from which to pick the components, or do you want to see all locations and then select one? You can also specify that you want to pick enough components to cover production for a certain number of days, for a date range, or for today's production.

Once you define how you want to pick the material, you'll use picking plans to translate requested stock into material picking instructions for stockroom processing. Once the material has been pulled and the picking plan is confirmed, the system decrements the picked quantities from the quantity available at the stockroom location.

When choosing the material to pick, the system considers existing on hand inventory quantity in the WIP location. This logic looks at all component requirements for the specified time frame and nets that against the existing quantity in the WIP location as well as all pending pick plans ready to release. This logic also takes any operation yield into account. This ensures that excess material in the WIP location is always used before additional material is issued. In addition, PeopleSoft Manufacturing looks at all production from the beginning of time, taking into account all previous material shortages.

Note. Quantities of an item that are stored in a nettable, available WIP location and reserved for production use aren't available for other purposes.

With this method, you can set a minimum quantity for the item in a specific WIP location. This enables you to maintain a buffer or a safety stock in the location to ensure sufficient quantity on hand is always available.

If you've opted to display substitutions on the pick plan, the process looks to see if sufficient quantity on hand exists to pick the full issue quantity. If not, all effective substitute items with available quantities are listed, along with their locations. The substitute items listed are based on the list of substitutes defined in the business unit's item attributes for the original component.

See Also

Chapter 22, "Issuing Material to Production," Reviewing and Confirming Picking Plans, page 496

Using the Kit Method

Use this method to issue components directly to production IDs for discrete production runs. When using the kitting method, you'll generate a PUSH or PULL picking plan in the same manner as the Issue method. The material is then assembled into batches or kits. You cannot use kitting with production schedules.

When additional kitted components are required for a production ID or excess material must be returned back to stock, use Issue/Return Kit Components. If you need to return a kit in its entirety, use the Component De-Kit page.

Kitting is the required issue method for rework and teardown end items. The end item to be reworked or torn down is issued using the kit method from a non-nettable storage location. The system issues any additional components required for rework or teardown production using the issue method set for each item at the production area/item level. This issue method defaults from the Define Business Unit Item - Manufacturing page and can be overridden on the Production Area - Item Detail page.

If you've chosen to display substitutions on the pick plan, the process looks to see if sufficient quantity on hand exists to pick the full, required quantity for the specific production ID or operation. If not, all effective substitute items with available quantities are listed, along with their locations. The substitute items listed are based on the list of substitutes defined in the business unit item attributes for the original component.

Using the Replenish Method

To define replenishment locations, use the Production Replenish Locations component (REPL_LOCATIONS). Use the REPL_LOCATION_CI component interface to load data into the tables for this component.

Use the Replenish method to stock components in the WIP locations at the work center where you'll be using the component. These components are typically stocked to a defined on hand quantity that you establish. During completions, the components are consumed from the WIP location. When the quantity on hand for an item falls below its replenishment quantity in that location, a workflow notification is sent to the stockroom, indicating the location must be replenished.

If you're using PeopleSoft Flow Production, you can also use Kanban cards, Pull Tickets, and Pull Lists to communicate the replenishment request. Before you move components into replenishment locations, specify the replenishment point for each component you manage using the replenish method. You'll also need to specify the issue multiple used to replenish the WIP location. Define both of these parameters using the Define Business Unit items pages. If you're using PeopleSoft Flow Production, you can also replenish your WIP locations directly from an inventory location, feeder line, or vendor using Kanban cards or online replenishment requests.

Pages Used to Define Production Replenishment Locations

Page Name	Object Name	Navigation	Usage
Prdn Replenish Locations	SF_REPL_INV	Inventory, Maintain Storage Locations, Production Replenish Locations, Prdn Replenish Locations	Define production replenishment locations. This is required if you're using PeopleSoft Flow Production. If you're using PeopleSoft Manufacturing without PeopleSoft Flow Production, you can set up production replenishment defaults if you're using Replenish as your component issue method.
Prdn Replenish Detail	SF_REPL_INV_DTL	Inventory, Maintain Storage Locations, Production Replenish Locations, Prdn Replenish Detail Click the Production Replenishment Detail button on the Production Replenish Locations page.	If you have PeopleSoft Flow Production installed, define how WIP locations are replenished. If you're using PeopleSoft Manufacturing without Flow Production, set up defaults if you're using replenishment as your component issue method.

Defining Production Replenishment Locations

Access the Prdn Replenish Locations page.

WIP locations

Select the storage location for this item. The storage levels that appear depend on the storage structure established on the Inventory Options page.

Iss Mult (issue multiple) and Repl Point (replenishment point)

Define values for these fields.

When the quantity on hand in the WIP location drops below the specified replenishment point, the system issues a workflow replenishment request indicating that additional material needs to be supplied, using the issue multiple you specify on this page.

If you are using PeopleSoft Flow Production, the system uses the issue multiple for the Kanban quantity.

Note. If you haven't installed PeopleSoft Flow Production, the system uses the replenishment point for only those items that have a replenishment mode of *Backflush-Controlled*.

WIP Min Qty (WIP minimum quantity)	Enter a value to indicate the minimum amount of the item you want stored at the WIP location that is not associated with a specific order.
WIP RPL Source (WIP replenishment source)	This field determines where to send your PeopleSoft Flow Production replenishment request and what source supplies your WIP location. Options are: • <i>Feeder.</i> A feeder line creates subassemblies that it feeds into the main production line. Once you have used a certain quantity of the subassemblies, you send a replenishment signal to start production on the feeder line. • <i>Inventory.</i> Replenish your WIP location directly from an inventory location. • <i>Vendor.</i> Replenish your WIP location by directly receiving purchased components from a vendor.
Repl Max Qty (replenishment maximum quantity), WIP RPL Source (WIP replenishment source), WIP RPL Mode (WIP replenishment mode), WIP RPL Type (WIP replenishment type), and WIP RPL Method (WIP replenishment method)	If you aren't using PeopleSoft Flow Production, these fields are unavailable. In this case, the system defaults a replenishment mode of <i>Backflush Controlled</i> and a replenishment method of <i>Workflow</i>.
Repl Max Qty (replenishment maximum quantity)	If you are using PeopleSoft Flow Production, this field is set to the maximum amount of the item you want stored at any WIP location using the item. This quantity includes the item's on-hand quantity and any open requests already made. The system issues a warning if you perform a replenishment transaction that exceeds the replenishment maximum quantity. Note. This field is available for only those items using the <i>Manual</i> replenishment mode.

See Also

Chapter 22, “Issuing Material to Production,” Defining Production Replenishment Locations, page 485
PeopleSoft Flow Production 8.8 PeopleBook, “Understanding the Flow Production Process”

Defining Replenish Details

Access the Prdn Replenish Detail page.

Repl Point (replenishment point) and Iss Mult (issue multiple)	Define values for these fields.
Repl Max Qty (replenishment maximum quantity)	If you are using PeopleSoft Flow Production, enter a value to set the maximum amount of the item you want stored at any WIP location using the item. It includes the item's on-hand quantity and any open requests already made.

Note. This field is available for only those items using the *Manual* replenishment mode.

WIP RPL Mode (WIP replenishment mode)

PeopleSoft Flow Production uses this field to determine how to generate replenishment requests for this item. Your replenishment request options include:

- *Backflush Controlled:* You consume components from the WIP location while backflushing completions. When the quantity on hand falls below the replenishment point, the system automatically generates a replenishment request to bring the on-hand quantity back above the replenishment point. The replenishment request is a multiple of the issue multiple. For example, if the replenishment point is 60, the on-hand quantity is 30 and the issue multiple is 20, then the system generates a replenishment request for 40 to bring the on-hand WIP location quantity back above the replenishment point.
- *Kanban Card:* The replenishment process uses Kanban cards as a manual request for material. Kanban cards are either entered or imported into the system and then printed out. A Kanban card would be attached to a box of components. Each Kanban card has a Kanban ID.
- *Manual:* You have a visual indicator that the WIP location needs replenishment, and you scan in the item ID and WIP location to generate a replenishment request for the specified issue multiple. This request includes the replenishment quantity and source location associated with that item and WIP location. This is largely used with electronic data collection.

Note. If you are using Kanban cards with PeopleSoft Flow Production, you can select a WIP RPL Type (WIP replenishment type) to designate whether you want your Kanban card to be used One Time or to be Reuseable. This field is available only if you select *Kanban Card* for your WIP replenishment mode.

WIP RPL Source (WIP replenishment source)

Your selection in this field determines where to send your PeopleSoft Flow Production replenishment request and what source supplies your WIP location. Options are:

- *Feeder:* A feeder line creates subassemblies that it feeds into the main production line. Once you use a certain quantity of the subassemblies, you send a replenishment signal to start production on the feeder line. If you select Feeder as your WIP replenishment source, the WIP Production Area field becomes available. Select the WIP production area that will serve as a feeder line for this item.
- *Inventory:* You replenish your WIP location directly from an inventory location. If you select Inventory as your WIP replenishment source, the Source Location fields become available for entry. Select the source storage location that will replenish this item. The location field is not mandatory but, if entered, must be a valid location. The storage levels that appear depend on the storage structure established on the Inventory Options Page.

WIP RPL Method (WIP replenishment method)

- *Vendor:* Use vendor replenishment to replenish your WIP location by directly receiving purchased components from a vendor. If you have selected Vendor as your WIP replenishment source, the Vendor ID and Vendor Location fields become available. Select the vendor ID and vendor location that will directly replenish this item. You can override this prior to dispatch if necessary.

Use this field to designate how the PeopleSoft Flow Production replenishment request is communicated. You must select Backflush or Manual as your WIP replenishment mode to use WIP replenishment methods. The WIP replenishment method options include:

- *Workflow:* The system generates a worklist entry that takes you to the Production Replenishment worklist and uses defaults for the item, quantity, and from/to WIP locations. You can override the values to complete the transfer.
- *Pull Ticket:* You create a one-time replenishment request through either a backflush or a manual scan and run the Pull Ticket print process to print the Pull Ticket. This is similar to a one-time Kanban card.
- *Pull List:* A Pull List is a list of Kanban requests that you use in a manner similar to the one you use for a pick list. You scan in Kanban IDs to transfer quantities. You run the Pull List process on a scheduled basis that picks up all new requests. You scan in the Kanban ID from the Pull List to transact each request.

Creating and Processing Picking Plans

PeopleSoft Manufacturing uses picking plans to translate requested stock into material picking instructions for stockroom processing. The system supports PUSH and PULL picking methods:

PUSH picking plan

System determines the locations from which to pick each item and creates a hard reservation for this item when you generate the pick list. A hard reservation reserves the item in a specific location. Once a hard reservation exists, the item is unavailable for other inventory transactions.

PULL picking plan

System lists all available locations from which the picker can pull the items. The picker then enters the actual location information. When pulling material to production, PeopleSoft Manufacturing doesn't make a hard reservation at the time the picking plan is generated.

Note. Item quantities in WIP aren't available to fulfill sales orders or material stock requests.

You can create a picking plan for items in a production area that use the production issue or production kitting material issue methods. Floor stock and expensed items are never kitted or issued.

When you pick lot-controlled items and if the lot isn't yet available or has already expired, the picking plan report prints the applicable date. If the date has already passed, the lot has expired; if the date is in the future, the lot isn't yet available. The Picking Plan displays material from a lot as available even if it has expired, but you can then change the location using the Review Plan process (SFS6000).

The system generates picking plans for production IDs and production schedules in the *Released* or *In Process* status.

To create and process a picking plan for issue or kit components:

1. Create a picking plan using either a PUSH or PULL picking method by using the Picking Options page.
2. Pick the material.

If you're using the PULL method, record the picked components and the storage area/location from which they were picked. If you're using the PUSH method, confirm that the components were picked from the storage area/location recommended in the pick plan. You can simultaneously confirm the picking plan and release material to production. Selecting the option to Release at Save, confirming the pick plan, then saving automatically initiates the Material Release process. Alternatively, you can schedule the process by running the Update Pick Batch confirming the pick plan and selecting either the Update Pick Batch process or the Update Pick Batch and Release process.

3. Review and confirm the picking plan using the Review Plan page.

If you pick quantity for the pick line in phases, then you should not check the complete option until you execute the final pick.

4. Issue material to the shop floor using the Material Release page, if the release process wasn't automatically initiated from the Update Pick Batch process or the Update Pick Batch and Release process.

See Also

PeopleSoft Inventory 8.8 PeopleBook, "Managing Item Lots," Establishing or Updating Control Parameters for a Specific Lot

Pages Used to Create and Process Pick Plans

Page Name	Object Name	Navigation	Usage
Picking Options	RUN_SFS6000	Production Control, Process Production, Issue Materials, Create Picking Plan, Picking Options	Generate picking plans for production. You can generate pick plans for production with a status of Released or In Process.
Pick Plan Extract	RUN_SFS6000_SEC	Production Control, Process Production, Issue Materials, Create Picking Plan, Picking Options Click the Attachment button to select a Pick Plan Extract file.	Use to indicate that you want to print the extract file for bar codes, and to indicate where the file is located.
Picking Options - Production Selection	RUN_SFS6000B	Production Control, Process Production, Issue Materials, Create Picking Plan, Production Range	Define the range of production IDs, production schedules, production areas, and item IDs for which you want to generate a picking plan.

Page Name	Object Name	Navigation	Usage
Runtime Settings	RUN_SFS6000A	Production Control, Process Production, Issue Materials, Create Picking Plan, Runtime Settings	Indicate the maximum number of locations to display once quantity has been fulfilled when running a pull pick plan and when displaying substitute items. Also use this page to set the commit level during processing. The commit level is the number of components that are processed between updates to the database and is used to minimize database locking. Note. This page is typically a hidden page, and it should be only be accessed by a system administrator. Once this page has been set up, the page should again be hidden.
Review Plan - Production Selection	SF_ISS_DIALOG	Production Control, Process Production, Issue Materials, Review Plan, Production Selection	Select the specific pick batch you want to review. You must generate at least one pick plan by using the Material Picking Plan process.
Review Plan	SF_PICK_TRANS	Production Control, Process Production, Issue Materials, Review Plan Enter information on the Production Selection page and click the Search button to retrieve the plan.	Confirm that the material was pulled from the suggested stores location, or to indicate from which location the material was pulled. You must generate at least one pick plan by using the Material Picking Plan process.
Pick Batch Options	RUN_SFS6002	Production Control, Process Production, Issue Materials, Update Pick Batch, Pick Batch Options	Select the report parameters for the pick batch you'd like to update. You must first generate a Pick Plan for selected production.
Update Pick Batch - Production Selection	RUN_SFS6002B	Production Control, Process Production, Issue Materials, Update Pick Batch, Production Selection	Select the production to update.

Page Name	Object Name	Navigation	Usage
Material Release	RUN_SFS6001	Production Control, Process Production, Issue Materials, Material Release	Use to issue material to the shop floor. Use this page if you selected the Do Not Release at Save option on the Review Plan page or did not select the two step process in the Update Pick Batch component. You must pick and confirm at least one pick plan.

Generating Picking Plans

Access the Picking Options page.

Picking Options **Production Range**

Run Control ID: ADHOC Report Manager Process Monitor **Run**

Language: English

Unit: US008 ☐ Report Only Mode ☐ Reprint Pick Batch
☐ Substitutes Pick Batch ID:
☒ Log Unpicked Lines

Locations selected by	Issue Method Option	Production Type	Picking Report Sort
☒ System (Push) ☐ Picker (Pull)	☒ Issue ☐ Kit ☐ Both Issue and Kit	☒ Production ☒ Rework ☒ Teardown	☒ By Component Break ☐ ☐ By Location

Picking Date/Shift Selection

Lead Time: From:
Lead Days: 2 Thru: 09/24/2003 3

Bar Code Options

☐ Print Bar Code
☒ Print Bar Coded Control Flags
☒ Print Extract File

Picking Options process page

Report Only Mode

Select this option when you want to preview the pick plan before running it. The system won't create material reservations in Report Only Mode as it is an information-only report.

Substitutes

Select this option if you want to print substitutes on the pick plan.

However, if you don't want the picker to pick substitutes, run the pick plan without displaying any substitutes. In this case, you can also run the pick plan in Report Only Mode first, listing Substitutes, then make the substitution on the component list before running the final pick plan.

Note. Substitute items for rework and teardown end items won't display.

Once a partial pick has been done using an item or its substitute, it must be completed with the same item. No partial picking is permitted. If there is a shortage of the original item and it has substitutes, the substitutes display on the pick plan and are distinguished by a border around the substitute item.

Note. The pick plan won't perform automatic substitutions.

Reprint Pick Batch

You can reprint a previously printed pick batch by selecting this option.

Pick Batch ID

This edit box becomes available when you select Reprint Pick Batch. Select the pick batch ID number.

If this is the first time you're printing the picking plan, don't select the Reprint Pick Batch check box.

System (Push) or Picker (Pull)

Indicate whether you want to use one of these methods to determine the locations from which the system picks components.

- If you select the PUSH method, the system recommends from which inventory locations to pick the material. When the system uses this method, it transfers the material from the suggested location upon material release. You can change the location prior to confirmation in the Review Plan page.
- If you're using the PULL method, you decide which inventory location from which to pull the material and enter that information in the Review Plan page. The picking plan displays all locations (up to a maximum of 10) where available inventory is located.

Issue Method Option

Select Issue, Kit, or Both Issue and Kit. Subsequent selection options depend on the issue method chosen here.

Issue

When this method is selected, components on production IDs or schedules whose issue method is set to Production Issue are picked. Since these components are sent to WIP locations for consumption during end item completions, the Production Selection process prompts you for WIP Location information.

The issue method uses netting to determine the amount of components to send to the WIP locations. The system considers all requirements through the selected date, even past due requirements when a date range is entered. It also looks at requirements from production areas outside of the selected range of production areas, if they share the same WIP locations.

For each required component, the system determines the available quantity on hand in the WIP location. If the quantity on hand is negative, the system treats it as zero. The system then determines the required quantity of the component for the selected production. The system also considers the quantity of in-process picking plans for the component and the WIP location.

The system then looks at the WIP minimum quantity, which is defined at the item/location level. It defines the additional quantity to be issued over and

above the demand for *Issue* components. Essentially, if all requirements occur as planned, and no additional material is issued to the WIP location, the component would have this quantity remaining in the WIP location.

Once all demand is calculated (quantity required + WIP minimum quantity), it's netted against all supply (quantity on hand in the WIP location + all pending pick plans destined for the location). If the demand is greater than the supply, that amount appears on the pick plan. If supply is greater than demand, the component won't print on the pick plan.

Kit

When this method is selected, components on production IDs whose issue method is set to Production Kit are picked. Since these components are issued directly to a production ID and aren't consumed from WIP locations during end item completions, you specify the production area, production ID and operation to which you want to send material. You cannot send material to a WIP location. The pick plan nets the component's scheduled quantity against the issued quantity. If the scheduled quantity is greater than the issued quantity, it prints the quantity on the pick plan. If the issued quantity is equal to or greater than the scheduled quantity, the system considers that component requirement fulfilled and won't print it on the pick plan.

Both Issue and Kit

This method assumes you're picking components for production regardless of the issue method. Using this option, some components are sent to WIP locations and some directly to a production ID. Within the Production Selection page, you specify to which production ID kitted components are sent as well as which WIP locations are stocked.

Production Type

Select *Production*, *Rework*, or *Teardown*.

Note. A component with item status of Hold for production type *Production* cannot be picked. However, a component with item status of Hold for *Rework* and *Teardown* production can be picked.

Picking Report Sort

You can sort your picking plan by Component, Location, or Production Area. The Production Area option is available for only pull and push kits.

Break

Select this option to indicate that you want each component or location to print on its own separate page. The options available depend on the issue method selected. These are the valid combinations and sort options:

Push/Pull	Issue Method	By Component	By Location	By Production Area/ID
Push	Kit	Yes	Yes	Yes
Push	Issue, Both	Yes	Yes	No

Push/Pull	Issue Method	By Component	By Location	By Production Area/ID
Pull	Kit	Yes	No	Yes
Pull	Issue, Both	Yes	No	No

Picking Date/Shift Selection Indicate the production start dates and shifts for which you want to include picking plans. This information is required. The system issues a picking plan for all components associated with operations due to start within:

- **Date Range:** The system picks all components associated with operations due to start on or between the From and Thru date and shifts specified. For example, if you enter from *3/1/02 shift* thru *3/2/02 shift 1*, the pick plan includes all the material required for production scheduled to start on 3/1/02 shifts 1, 2, or 3 and 3/2/02 shift 1. If you have selected Issue in the Issue Method Option, the From date field is unavailable. The pick plan automatically considers all requirements from the beginning of time and nets that against what was already consumed (issued to the production ID or production schedule), pending pick plans ready to release and any quantity remaining in the WIP location. This ensures all past due shortages are fulfilled.
- **Lead Time:** Enter the number of days of production you want to pick in the Lead Days field. The current date (today) is considered 1 lead day. Once the lead days are entered, the date through which production is picked is displayed in the Thru date and shift fields. Because the production or work center calendars aren't considered, the number of lead days also includes weekends in its Thru date calculation.
- **Today:** Select this option to run pick plans for all components associated with operations due to start today. When selected, the Thru date automatically defaults to the current date and shift 3. This indicates a pick plan will be run for all shifts. You can change the date or shift if you want to pick for a different day or through a different shift. When you exit the page and return, the Thru date defaults to the current date and shift 3, regardless of what was entered and saved in a previous session.

Print Bar Code

Select this option if you want the system to print bar codes for bar coded fields on the Pick List.

Print Bar Coded Control Flags

Select this option to print bar code control flag information. Bar Coded Control Flags are item attributes flags.

Note. PeopleSoft Inventory delivers printer settings for all SQR output to a generic line printer. However, when printing bar coded information on reports, such as the Material Putaway Plan and the Picking Plan report on a PCL printer (HP Laser Jet), you must first define the printer type accordingly. You may do this by changing the printer type settings PeopleSoft Inventory delivers in SETENV.SQC from LINEPRINTER to HPLASERJET.

If you're using electronic data collection, you can create a pick plan extract file. This file can be downloaded to a data collection device and used instead of a paper pick plan. The extract file is ASCII format and contains all the information included within the regular pick plan.

Using the Pick Plan Extract Page

Access the Pick Plan Extract page.

Print Extract File	Select to create a picking plan extract file.
File Directory and File Name	Enter the location to which you want to save the pick plan extract.
OK	Click to return to the Picking Options page.

Entering Picking Plan Production Criteria

Access the Production Selection page.

Production Area Information	The production selection options available on this page depend on the material issue method you chose on the picking options page. For example, if you select the Kit method on the picking options page, the WIP Location Range for Issues group box items won't be available.
Prdn Areas (production areas)	You can select one of these options when generating picking plans for components using the Issue or Kit method: • All: If you select this option and the issue method you selected is Issue, you can additionally enter a range of WIP locations. • Range: If you select this option, the system looks at all WIP locations for the production selected.
Options for Kits	You can select one of these options when generating picking plans for components using the Kit method: • All • Range • Prdn ID - you can also indicate either All or a Range • Item ID - you can also indicate either All or a Range
WIP Location Range for Issues	Select All or Range if all production areas use the Issue method. Within the range of storage area, you can further define your selection by any of the 4 location levels set up in your inventory. If you selected a range of production areas, you can't select a range of WIP locations.

Note. If you're selecting consigned kit issue components, including lot- and serial-controlled components, the system picks from *both* owned and non-owned WIP storage locations.

Run Click to run this request. Process Scheduler runs the Pick Plan process and report (SFS6000) at user-defined intervals.

Defining Runtime Settings for Pick Plans

Access the Runtime Settings page.

Pick Plan Commit Batch This field controls database pick plan commit level processing.

Pick Plan Commit Batch Enter the number of components you want to process before a database update is performed.

If you don't want to do intermittent commits, then set the commit level to a higher number that is larger than the normal number of components that are usually processed within a Pick Plan. You may need to try different commit levels to achieve the maximum level of performance while minimizing database locking. The default is *100*.

Max Pull/Substitute Locations (maximum pull/substitute locations) Enter the maximum number of locations you want displayed when running a Pull pick plan. This value is also used to determine the number to display for substitute components and their locations. The default is *10*.

Reviewing and Confirming Picking Plans

Once you generate the picking plan, you'll need to review the plan, make any modifications to PUSH picking plans before picking the material, and enter the picking locations for the material if you're using the PULL method to issue material. You can modify the picking plan before or after you pick the material.

Defining Production Criteria for Reviewing Pick Plans

Access the Production Selection page.

Unit and Pick Batch ID When reviewing the pick plan, these fields are required.

Line #, Component ID, Production ID, and WIP Location You can use these fields to narrow your selection or as an optional means of viewing the pick plan.

Pick Batch ID The number associated with the batch. You can select the entire Pick Batch ID or choose From Line # and To Line # to review part of the pick batch. The pick list line number is a sequential number corresponding to each heading on the report, the component/production ID or production schedule/operation for kitted production, or a component and a WIP location for issue production.

Component ID Enter to review a picking plan for a specific component ID.

Production ID Enter to review a picking plan for a specific production ID.

WIP Location and storage Area For picking plans using the Issue method, enter values for these fields and for the levels of locations defined for your PeopleSoft inventory business unit to review a picking plan for a specific location.

Search Click this button to retrieve the selected pick plan.

Reviewing the Pick Plan

Access the Review Plan page.

Production Selection **Review Plan**

Unit: US008 **Pick Batch ID:** 9 **Release:** No Release at Save [Process Monitor](#)

Pick Lines Find | View All First 1 of 43 Last

Pick Line:	1	Quantity Short:	100.0000 EA	Non-Owned:	N
Component ID:	FR7003	Bike Frame, Carbon Fiber			
Prdn ID:	PRD00127	Op Seq:	10	Qty Code:	Asy
Item ID:	SR1002	Carrera 6000 Hi Performance Road Bike		Area:	FINAL
		Prdn Type:	Production		

Storage Locations Find | View All First 1 of 1 Last

Storage Area: AREA1 **Container ID:**

Qty Picked: 100.0000 EA **Std UOM** **Qty Reserved:** ☒ Confirm ☒ Completed

Qty Picked: 100.0000 EA **Loc UOM** 100.0000 EA

Review Plan process page

Release

Select how you want the material release to occur by choosing one of these processes:

- *No Release at Save:* Upon saving the page, material is reserved but not released to the production floor. You can release material to the production floor by using the Material Release page.
- *Release at Save:* Upon saving the page, material is reserved and released to the production floor. The system automatically runs the Material Release process, which decrements the quantity on hand in the selected stores locations and issues the material to the WIP locations or to the production ID.

Kit Components

Where substitutes exist, the Comp ID (component ID) field is available, and you can display substitutes for the component.

The substitute component list is obtained from the BOM. No partial substitutions are allowed if components have previously been issued.

Note. When a Kit component is substituted, the component list is updated to reflect the substitution when you press Save within the Review Plan page.

If a substitution is done on a PUSH pick plan, the original component is unpicked and the new component quantity picked. If the substitution is done on a PULL pick plan and a pick has already been recorded, the substitution is treated the same as for a PUSH plan.

Issue Components

For Issue components that are consigned, the Pick Plan prints only non-owned material locations. If this component exists in an owned location, it

must be manually transferred to an owned WIP location to be used in production. This cannot be done using the Pick List.

The substitute component list is obtained from the business unit level because the component may be associated with multiple end items, resulting in multiple substitute item lists.

Where substitutes exist, the Comp ID (component ID) field is available, and you can display substitutes for the component.

When an Issue component is substituted, you must maintain the information at the component list on the Component List Maintenance or Edit/Issue Components page to record the substitution on the appropriate production IDs and production schedules. Until the data is updated or if another pick plan is run, the system attempts to pick the original component again.



The system displays the number of storage levels defined for each storage location. Click the Storage Location Search button to search for a different storage area.

If you're using the PUSH material issue method, the recommended storage area displays. You can modify the storage area, if you pulled material from an alternate location, as well as the Qty Picked (quantity picked). If you need to change the picking location for a component, set the quantity to zero or delete the existing row, and insert a new row.

Storage Area

If you're selecting consigned kit issue components, including lot- and serial-controlled components, you may optionally pick from *both* owned and non-owned WIP storage locations if material exists in both.

If you're using the PULL material issue method, specify the storage location such as *Aisle*, *Level 1*, *Level 2*, *Level 3*, and *Level 4*, depending on your storage level setup.

When using the PULL material issue method for rework or teardown production, you can override the typical method and choose a nettable location.

Container ID

Enter the value if you're picking from containers.

Confirm

After reviewing each entry, you can confirm your selection by selecting this option. If you confirm an item with the item status of *Hold*, you'll receive a warning at save time. However, you won't be prevented from confirming the pick. Only those components that have been confirmed are released to production.

Note. If you're modifying previously saved pick information, only the quantities can be modified. If you want to change picking location information, set the quantity to zero or delete the row, and insert a new row.

Completed

Select this option to indicate that you are finished picking this pick line location. This option works with the Confirm option as follows

- If you select both Complete and Confirm, you will not be able to pick additional quantity for this pick line location after the material release process has been run.

- If you do not select Complete but you do select Confirm, you will be able to pick additional quantity for this pick line location after the material release process has been run.
- If you select Complete but you do not select Confirm, then the material release process will not process this pick line.
- If you do not select Complete or Confirm, then the material release process will not process the pick line.

Lot ID and Serial ID

If you're using the PUSH material issue method, the Serial ID displayed is the serialized component that should have been picked from the storage area. If the component is lot-controlled, the system displays the Lot ID from which the component should have been picked. If you need to change the serial ID or lot ID for a component, set the quantity to zero and insert a new row.

If you're using the PULL material issue method, specify the Serial ID or Lot ID for each component you picked.

If you are entering data for rework or teardown production IDs that are using serial genealogy, please keep these in mind:

- If the assembly is serial-controlled and the Serial in Production option is selected and the component being issued is the assembly item, then you must enter a serial ID when prompted.
- If the assembly is not serial-controlled, but the Serial in Prdn option is selected, then you must enter a serial ID when prompted.
- The serial association occurs during the update.

Note. If the component to be issued is not serial controlled but trace usage = serial, the Pick Plan process will not suggest the serial ID to pick. You must indicate which serial IDs are to be picked. The system will validate that the components have not been assigned to another production ID.

Note. This logic is also applied to other Kit issues.



If you don't need to make any changes to locations or quantities or once all changes and selections have been made, you can confirm all of the suggested locations and quantities at one time when you click the Confirm All button at the top of the page.



Click the Unconfirm All button to reverse all confirmed locations and quantities.



If you choose to not pick any of the items on the pick plan, click the Delete All button to remove these rows from the pick plan. This relieves any hard material stock reservations that have been made.

Confirm

You can optionally confirm selected pick lines by selecting this check box to indicate these pick lines are correct and material is ready to be released.



Click the Next button to access additional items in the scroll area.



Click the All Complete button to indicate that all pick lines have been picked and there is no other quantity to be picked.



Click the All Incomplete button to indicate that all pick lines are not complete which indicates that you may want to pick additional quantities for specific pick lines.

Save

Click to process your review plan.

Updating Pick Batches

Use the Update Pick Batch component to review your plan for a pick batch as a whole, or for a range of components, WIP locations, or production. This enables you to confirm, unconfirm, complete, uncomplete or delete entire pick batches rather than maintaining each component one at a time. When you select the delete option, it won't affect any lines that have been previously released. Use this transaction to clear any unpicked pick lines.

In addition, you can simultaneously update the pick batch and release material to production using this component by running the Update Pick Batch and Material Release process (SFCONREL) or the Update Pick Batch process (SFS6002).

Setting Pick Batch Options

You can select pick batch options to update.

To select pick batch options to update:

1. Access the Pick Batch Options page.
2. Enter this information:
 - a. Select the Pick Batch ID.
 - b. Select All or a Range of line numbers.
 - c. Select the option of Confirm, Unconfirm, or Delete (Unreserve).
 - d. Select the option of Complete, Incomplete, or Unchanged.
 - e. To update the pick batch only, select Update Only - No Report.
 - f. To delete the pick batch detail, choose Update and Report.

Note. All items specified on the pick plan are confirmed, even if they have been placed on hold subsequent to the generation of the pick plan.

Selecting Production Pick Batches

You can select production pick batches.

To select a production pick batch:

1. Access the Production Selection page.

2. If you're updating a pick batch for kitted material, select a range of Prdn ID (production IDs) or Item IDs.
3. (optional) Click the Item Search button next to the Item ID field to access the Item Search link to locate a different item.
4. Select All or a Range of WIP locations by storage location, depending on your storage level setup, when updating a pick batch for components using the Issue method.
5. (optional) Click the Storage Area Location button next to the WIP location fields to access the Storage Location Search link to select a different storage location.
6. Click Run to run this request. You can choose to run the Update Pick Batch and Material Release (SFCONREL) process or the Update Pick Batch (SFS6002) process. The Update Pick Batch and Material Release process is a two-step process that simultaneously updates pick batches and releases material to the production floor. This process must run on a server. If you don't want to release material to production at this point, select the Update Pick Batch process. The Process Scheduler runs either process at user-defined intervals.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "Defining User Preferences," Defining Manufacturing User Preferences

PeopleSoft Inventory 8.8 PeopleBook, "Structuring Inventory"

Issuing Material to the Shop Floor

You can issue material to the shop floor.

To run the Material Release process to issue material to production:

1. Access the Material Release page.
2. Indicate whether you want to release material for All confirmed picking plans, or only for those picking plans that are associated with a Single pick batch.
3. Click Run to run this request. Process Scheduler runs the Material Release (SFS6001) process at user-defined intervals.

Note. Items with the item status of *Hold* can be released.

See Also

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS6000 - Material Picking Plan, page 676

Replenishing WIP Locations

As you're completing assemblies at either an operation or to stock, components using the Replenish method are consumed from the WIP location associated with the operation sequence you're completing. Once the quantity on hand for the component falls below the recommended stocking level, the WIP location must be replenished. The Replenishment Notification workflow can be sent to the stockroom indicating that a set quantity should be moved to the WIP location. If you are using PeopleSoft Flow Production, you can also use Kanban Cards, Pull Tickets, and Pull Lists to communicate the replenishment request. WIP locations can be replenished directly from an inventory location, feeder line, or vendor using Kanban cards or online replenishment requests

See Also

PeopleSoft Flow Production 8.8 PeopleBook, "Understanding the Flow Production Process"

Pages Used to Replenish WIP Locations

Page Name	Object Name	Navigation	Usage
Worklist (optional)	WORKLIST	Worklist, Worklist	Use to issue components whose issue method is <i>Replenish</i> . Backflush material to create worklist entries for components whose issue method is <i>Replenish</i> .
Prdn Replenish Locations (optional)	SF_REPL_INV	Inventory, Maintain Storage Locations, Production Replenish Locations, Prdn Replenish Locations	Define production replenishment locations. This is required if you're using PeopleSoft Flow Production. If you're using PeopleSoft Manufacturing without PeopleSoft Flow Production, you can set up production replenishment defaults if you're using replenishment as your component issue method.
Kanban Transfers (optional)	BCT_INV_TRFR	- Data Exchanges, Create Transactions, Manufacturing, Kanban Transfer - Production Control, Process Production, Transact Kanbans, Scan Kanban Transfers, Kanban Transfer - Data Exchanges, Create Transactions, Inventory, Storage Location Transfer, Inventory Transfer	Enter or scan in Kanban transfers to replenish WIP location using electronic data collection.

Issuing Components using the Replenish Method

Access the Worklist Details page.

Worklist for VP1: Kenneth Schumacher

Detail View Work List Filters: Replenishment Worklist

From	Date From	Work Item	Worked By Activity	Priority	Link
Atamian, Wes	10/21/2003	Replenishment Worklist	Prdn Replenishment		US008.WH1007.FA.AIS1.RCWL... AREA2.1.1...N.2003-10-21- 13.53.28.000000.50

Mark Worked Reassign

Worklist page for replenishment

The worklist entry includes the business unit, component ID, destination location, and the source location. The system recommends an issue quantity based on the item's issue multiple. When you select the worklist entry, the system transfers you to the Kanban Transfers page.

Creating Kanban Transfers

Access the Kanban Transfers page.

Transfer Qty (transfer quantity)	The total quantity required at the WIP location.
Stocking UOM	You can change the Stocking UOM by changing the UOM that displays next to the transfer quantity field. If the business unit parameter allows for negative inventory balances, you can drive the on-hand quantity of the source location negative.
Original Location	The location from which you picked the material. The system defaults the Original Location based on the information defined for the Item/Replenish Location page or the WIP Replenishment page in business unit items. You may override the suggested location if you picked the material from a different location.
Area	Enter the appropriate area from which you're transferring material.

Capacity Checking and Replenishing WIP Locations

If the item is designated as an Isolate Item on the Inventory-Shipping/Handling page in the Define Business Unit Item component, you can replenish it to only empty WIP locations or to locations containing stock with the same item ID. The system prevents you from moving an Isolate Item to a WIP location with other items.

If you designate a WIP location as storing only one item on the Volume/Weight Capacity page, the system replenishes only material with that item ID to the location. If you don't specify an item ID for a single-item WIP location, the first replenishment transaction to the empty WIP location defines the only item ID that the location can contain until the item quantity has been fully depleted.

See Also

PeopleSoft Inventory 8.8 PeopleBook, "Preparing to Implement PeopleSoft Inventory," Allowing Negative Inventory and Displaying Warning Messages

PeopleSoft Inventory 8.8 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory," Defining Basic Business Unit Attributes

PeopleSoft Managing Items 8.8 PeopleBook, "Defining Items," Establishing Item Shipping and Handling Attributes

Processing Kit Issues and Returns

Use the Issue/Returns Kit Components page to issue additional material to a production ID or return excess material back to stock. When processing kit issues and returns, you can only select production where at least one component from the component list has an issue method of Kit.

You can only process kit issues and returns for production with *Released*, *In Process*, or *Pending Complete* statuses. If the production ID is in the *Released* status and you issue material using this page, the status is updated to *In Process*. You can't return a component that isn't included on the component list, but you can issue different components by adding a row. You cannot return more than was issued for the component nor can you do a miscellaneous issue or return of an Expensed item.

Capacity Checking and Processing Kit Issues and Returns

For kit returns, if you designate a storage location as storing only one item on the Volume/Weight Capacity page (accessible from the Material Storage Locations page), the system only puts away material with that item ID in the location. If you don't specify an item ID for a single-item storage location, the first putaway transaction to the empty storage location defines the only item ID that the location can contain until the item quantity has been fully depleted. If the storage location is flagged as storing one item, the system prevents you from returning a different item to that location. If the WIP location is flagged as storing one item, the system prevents you from issuing a different item to that location.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Defining Your Operational Structure in PeopleSoft Inventory,” Defining Default Storage Location Structures and Attributes

PeopleSoft Inventory 8.8 PeopleBook, “Structuring Inventory”

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Modifying Item Attributes for the Business Unit

Common Elements Used in This Section

Prdn Start Qty (production start quantity)	The quantity required at the beginning of the operation sequence or production process. This quantity will be rounded up to account for any operation yield.
Prdn End Qty (production end quantity)	The quantity expected at the end of the operation sequence or production process. This quantity will be rounded down to account for any operation yield.

Pages Used to Process Kit Issues and Returns

Page Name	Object Name	Navigation	Usage
Kit Issue/Return Summary	SF_KIT_ISSUE_HDR	Production Control, Process Production, Issue Materials, Issue/Return Kit Components, Kit Issue/Return Summary	Use to issue additional kit components to production and return excess or defective components back to stock. You must define a production ID with at least one component using the <i>Kit</i> issue method.
Kit Issue/Return Location	SF_KIT_ISSUE_EXPR	Production Control, Process Production, Issue Materials, Issue/Return Kit Components, Kit Issue/Return Location	Indicate where you want to return Kit components.
Directed Putaway Locations (optional)	IN_PTWY_LOC	Production Control, Process Production, Issue Materials, Issue/Return Kit Components, Kit Issue/Return Location Click the Directed Putaway link.	Use directed putaway rules for the component you're returning to inventory. Note. If Directed Putaway isn't activated on the Putaway Rules page in PeopleSoft Inventory, the Directed Putaway link is unavailable.
Lot/Serial Number Selection	SF_SERIAL_WRK	Production Control, Process Production, Issue Materials, Issue/Return Kit Components, Kit Issue/Return Location Click the Select Lot/Serial link.	Indicate the lot ID and/or serial numbers of the components to be issued or returned.
Issue/Return Kit Components	SF_KIT_ISSUE_DET	Production Control, Process Production, Issue Materials, Issue/Return Kit Components, Kit Issue/Return Detail	Use to edit or view detailed information for each component on the component list.

Processing Kit Issues and Returns

Access the Kit Issue/Return Summary page.

Kit Issue/Return Summary		Kit Issue/Return Location		Kit Issue/Return Detail	
Unit:	US008	Process Monitor		Setup Print Options ☐ Print at Save	
Production ID:	PRD00222 In Process	Prdn Type:	Production		
Production Area:	FINAL	Start Date:	10/29/2003	Prdn Start Qty:	10.0000
Item ID:	SR3001	Due Date:	10/29/2003	Prdn End Qty:	10.0000
Serial in Prdn ☒	Diablo 500 Touring Bike				

Component List								Customize Find View All		First	1 of 1	Last
		*Component ID	Description	Op Seq	Pending Issue Qty	Pending Yield Loss Qty	*Per	Std UOM				
		SR2300	Brake Subassembly	20	1.0000	0.0000	Asy	EA				

Kit Issue/Return Summary page

Print at Save

Select this check box if you want to print production documents for a particular production ID at save time.

Setup Print Options

Click this link to access the Process/Output Options page to select different print criteria for the production documents.



Click the Issue/Return Location button to access the Issue/Return Location page to select a specific location to which you want to return the kit components.



Click the Detail button to access the Kit/Issue Return Detail page to view additional component details.

Component ID

Displays all components used to manufacture the end item that are issued to production using the Kit method. Each Component ID is a valid item ID for the business unit.

For regular production, the system displays the components in effect for the end item at the due date of production or for the item revision if one is specified. For rework production, the end item is the only component listed unless the item has a rework BOM or you have previously maintained the component list and added those components necessary to rework the end item. Teardown production is similar to rework in that the end item to be torn down is the only component listed unless you included additional material to the component list.

You can change any component to a different item ID, or add a new component or substitute. You can't change the component ID or operation sequence it is associated with once any quantity has been issued.

For all production types, when adding a new component with item status of *Discontinue*, you will receive a warning message. For regular production, you will receive a warning message when adding a component with item status of *Hold*. In both cases, receiving the warning message won't prevent you from performing the action. For rework and teardown, components with item status of *Hold* are issued.

For regular production, you can't add the end item as a component. On the other hand, for rework production, you can't delete the reworked end item from its component list. For teardown production, you can't delete the

end item to be torn down from its component list. Duplicate components can exist as long as the operation sequence is unique.

Note. Consigned kit components can be issued from both owned and non-owned WIP storage locations. However, consigned kit components are returned to owned WIP locations only.



Click the Item Search button to access one of these pages.

- Item Search: To search for the item ID using various search criteria.
- Item Availability: To determine whether the item you want to use is available.
- Item Substitution: To display substitutes.

Pending Issue Quantity

Enter the additional amount to be issued for each component as a pending issue quantity. If you’ve added a new component, enter the amount of the new component that will be issued. If you’re returning components, enter the amount as a negative quantity. The system allows only quantities up to the component list issue quantity to be returned. You can’t process returns for components that don’t exist on the component list.

Pending Yield Loss Quantity

If a certain number of the components were lost either during the issue process or during production, enter that amount in the pending yield loss quantity.

Note. If you have enabled PeopleSoft Workflow, the system uses the Replenishment Notification workflow to notify the production supervisor (or other defined role) that there is a non-zero quantity in the pending issue field of a component.

Adding Components

You can add components to a component list.

To add components to the component list:

1. Click the Add button and select the Component ID.
2. Select the Op Seq (operation sequence) at which the component is used, and indicate whether the component quantity is *Per Asy* (assembly) or *Ord* (order). The operation sequence defaults to zero (0). Change the operation to indicate where the component is used.
3. Enter the Pending Issue Qty (pending issue quantity), and any Pending Yield Loss Qty (pending yield loss quantity).

Note. For teardown and rework production, the system suggests that you issue the end item to be torn down or reworked from a non-nettable location, but you can issue from any location.

4. Click Save to save your changes.

See Also

- Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS2003 - Production Documents, page 672
- PeopleSoft Inventory 8.8 PeopleBook, “Inquiring and Reporting About On-Hand Stock,” Checking Item Availability
- Chapter 19, “Maintaining Component Lists,” Making Item Substitutions, page 445
- Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649

Selecting a Location for Issued and Returned Kit Components

Access the Kit Issue/Return Location page.

Kit Issue/Return SummaryKit Issue/Return LocationKit Issue/Return Detail

Unit:US008Production ID:PRD00222Production Area:FINALDue Date:10/29/2003

Item ID:SR3001Diablo 500 Touring BikeSerial in Prdn☒

Component DetailsFind | View AllFirst1 of 1Last

*Component ID:SR2300Brake SubassemblyNon-Owned:NSummary

Op Seq:20Detail

Pend Issue:1.0000 EAPend Loss:0.0000 EAIss Qty Total:0.0000 EA

Storage LocationsFind | View AllFirst1 of 1Last

Storage Area:Container ID:

Serial ID:NONESelect Lot/Serial

Issue/Return Qty: EA

Kit Issue and Returns - Kit Issue/Return Location process page

Issue Qty Total (issue quantity total)	Value represents the total quantity to be issued.
Non-Owned	Value indicates if the component is either non-owned or consigned. You can issue additional configured, kit components from both owned and non-owned WIP storage locations.
Storage Area	Select a value.
	Click the Storage Location Search button to select a different storage location. If you’re returning a component to inventory and you don’t want to use the default putaway location, you can use Directed Putaway to determine the component’s putaway location. The system suggests putaway locations that meet the Directed Putaway predefined rules. For example, you might want to putaway items in zones or based on available space or weight constraints. You can override the system-suggested storage location if necessary.
Note. Consigned kit components must be returned to owned storage locations.	
Container ID	Specify the container if you want to move the quantity to or from a container. If a container is specified and the container exists in a storage area, the system

displays the storage location for the container. If the container doesn't exist in a location or if a container isn't specified, enter the storage area from which the components are issued or to which they will be returned.

Quantity

Enter the issue or return quantity. If you're returning components, enter the quantity to be returned as a *negative* number. To issue components, enter the quantity to be issued as a *positive* number.

Selecting Directed Putaway Locations

Click the Directed Putaway link on the Kit Issue/Return location page to use directed putaway rules for the component you're returning to inventory.

Note. If Directed Putaway isn't activated on the Putaway Rules page in PeopleSoft Inventory, the Directed Putaway link is unavailable.

If more than one option meets the putaway rules, the system displays all options, so use the check boxes to select a location. The system suggests a storage Area including storage levels such as *Aisle*, *Level 1*, *Level 2*, *Level 3*, and *Level 4*, that have been defined.

You also indicate the Putaway Rule, whether or not to Mix Stage Dates or Lots, and whether or not it's the default rule on the Putaway Rules page.

Capacity Checking and Directed Putaway

For kit returns, if you designate a storage location as storing only one item on the Volume/Weight Capacity page (accessible from the Material Storage Locations page), the system only puts away material with that item ID in the location. If you don't specify an item ID for a single-item storage location, the first putaway transaction to the empty storage location defines the only item ID that the location can contain until the item quantity has been fully depleted. If the storage location is flagged as storing one item, the system prevents you from returning a different item to that location.

See Also

PeopleSoft Inventory 8.8 PeopleBook, "Preparing to Implement PeopleSoft Inventory"

PeopleSoft Inventory 8.8 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory"

PeopleSoft Inventory 8.8 PeopleBook, "Receiving and Putting Away Stock"

Issuing or Returning Kit Serial-Controlled Components

Access the Lot/Serial Number Selection page.

Serial IDs

If you're issuing additional serial-controlled components, this page displays the serial numbers of the components in the stores location. If you're returning components, the page displays the serial IDs that were already issued to the production ID.

If you are returning components on a production ID that has the Serial in Production option selected but are not serial-controlled, you will need to select a serial ID when prompted. The system will disassociate the component from the assembly serial ID upon save.

If you are returning components on a rework or teardown production ID that has the Serial in Production option selected, you will need to select a serial ID when prompted. The system will disassociate the component from the assembly serial ID upon save.

Sel (select)

Select the serial-numbered components you want to issue or return by selecting one or more check boxes.

If you're issuing additional serial-controlled, consigned kit issue components, you can pick from *both* owned and non-owned WIP storage locations.

If you're returning serial controlled, consigned kit issue components, you'll only be able to select the component's *owned* WIP storage locations.

Lot ID

The component's lot number displays if the item is both serial- and lot-controlled. Otherwise, it defaults to *NONE*.

Issue Quantity

Value is display only for serial-controlled items. It should always be *1.0000* for items with serial numbers.

OK

Click to accept your selections and to return to the Kit Issue/Return Location page. The lot and/or serial numbers you selected display on the Kit Issue/Return Location page.

Issuing or Returning Kit Lot-Controlled Components

Access the Lot/Serial Number Selection page.

Lot ID

If you're issuing components, this page displays the lot associated with the stores location. If you're returning components, the page displays the lot IDs for the components that were already issued to the production ID.

If you're issuing additional lot-controlled, consigned kit issue components, you can pick from *both* owned and non-owned WIP storage locations.

If you're returning lot- controlled, consigned kit issue components, you'll only be able to select the component's *owned* WIP storage locations.

If assembly item's Serial in Prdn option is selected and you are returning a lot-controlled component, the system will disassociate the lot component from the assembly serial ID upon save.

Issue Quantity

Specify the quantity of components you want to issue or return from each lot.

OK

Click to accept your selections and to return to the Kit Issue/Return Location page. The lot or serial numbers you selected displays on the Kit Issue/Return Location page.

Viewing or Editing Kit Issue/Return Detail

Access the Kit Issue/Return Detail page.

Pending Issue Qty (pending issue quantity), Pending Yield Loss Qty (pending yield loss quantity)	Although these values default from the Kit Issue/Return Summary page, you can change the quantities here.
Issue Qty (issue quantity)	The quantity issued from the stores location and charged to work in process.
Yield Loss Qty (yield loss quantity)	The component quantity that was scrapped during end item completion or lost during the issuing process.
Note. If you’re issuing additional material and the storage location doesn’t have sufficient unreserved quantity, but the business unit is set up to allow negative quantity and to notify you when it is driven negative, the system will display a warning. If you continue, the location’s quantity on hand is decremented and the issue quantity for the component is updated when you save the page.	

Processing Component De-Kits

If you need to return a complete kit to stock or reverse all kit transactions for a production ID, use the Component De-Kit component.

Note. You can’t de-kit production IDs if completions, scrap or actual labor times have been recorded.

Note. If you are de-kitting a production ID that is being traced by serial genealogy, the components associated with the production ID will be automatically disassociated during the de-kit process.

Page Used to Process Component De-Kits

Page Name	Object Name	Navigation	Usage
Component De-Kit Selection	RUN_SFS6003	Production Control, Process Production, Issue Materials, De-Kit Components	Return a complete kit to stock, or to reverse all kit transactions for a production ID. You can only de-kit a production ID with an <i>In Process</i> production status.

Returning Kits to Stock (SFS6003)

Access the Component De-Kit Selection page.

Return to Location and Default Putaway Location	The defaults for these fields display. The components are returned to their default putaway location if one has been previously defined. If you want to return the kit to a Specific Location, the location fields become available. If you’re returning both owned and non-owned inventory (including consigned items), you must specify a Owned Components Location as well as a Non-Owned Components Location. When a specific

location is chosen, all components are returned to the location specified. Consigned items will be returned to an Owned Location.

If you're returning lot or serial-controlled, consigned kit issue components, you can select only the component's *owned* WIP storage locations.

Note. All components with item status of *Hold* can be returned to inventory.

Directed Putaway

Select this option if you're using the Directed Putaway process to choose a location.

Storage Area

The system displays the number of storage levels, such as *Aisle*, *Level 1*, *Level 2*, *Level 3*, and *Level 4* that have been defined for each storage area.

Run

Click to run this request. Process Scheduler runs the Component De-kit (SFS6003) process at user-defined intervals.

Once the process runs, the production ID's status is changed back to *Released* as long as no other components have been issued with issue methods of Issue or Replenish.

Capacity Checking and De-Kitting Components

If capacity checking is activated, the system updates the location's capacity balances when de-kitting components.

For kit returns, if you designate a storage location as storing only one item on the Volume/Weight Capacity page (accessible from the Material Storage Locations page), the system only puts away material with that item ID in the location. If you don't specify an item ID for a single-item storage location, the first putaway transaction to the empty storage location defines the only item ID that the location can contain until the item quantity has been fully depleted. If the storage location is flagged as storing one item, the system prevents you from returning a different item to that location.

See Also

PeopleSoft Inventory 8.8 PeopleBook, "Preparing to Implement PeopleSoft Inventory"

PeopleSoft Inventory 8.8 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory"

PeopleSoft Inventory 8.8 PeopleBook, "Receiving and Putting Away Stock"

Issuing Material Using Electronic Data Collection

PeopleSoft Manufacturing enables you to use both the picking plan and the kit issues and returns processes with an electronic data collection system. You can access electronic data collection transactions through the Data Exchanges navigation as well as processing them using electronic data collection hardware.

When you save an electronic data collection transaction page, the page clears so that you can enter another transaction immediately. The transaction is saved in the transaction log until it is processed by background processes that continually scan the transaction log. Only selected pieces of information have edits to verify the data that is being entered with electronic data collection transaction pages. The background processes validate all information before any updates are performed.

PeopleSoft Manufacturing provides the Production Picking (PRODUCTION_PICKING) EIP to import picking information from third-party systems.

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Receiving and Putting Away Stock”

Chapter 1, “Getting Started with PeopleSoft Manufacturing,” PeopleSoft Manufacturing Integrations, page 6

Page Used to Issue Material Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Production Picking	BCT_MG_PIK	Data Exchanges, Create Transactions, Manufacturing, Production Picking	Use to use the Production Picking EIP to import picking information from third-party systems.

Processing Picking Plans Using Electronic Data Collection

You can use electronic data collection to execute picking plans.

To execute picking plans using electronic data collection:

1. Create a picking plan.

The picking plan can be either a paper report or alternatively, the download of the pick plan in the form of an extract file. If an extract file is created, it may be downloaded to the data collection device and used instead of a paper pick plan. You have the option to create an extract file when you request your picking plan.

2. Execute the pick plan, which is performed by traveling the physical warehouse and collecting the items and recording the pick information.

This step is performed using a hand held device, such as a Radio Frequency (RF) device or a batch data collector. If you use a pick plan extract file, the data collection activity has the advantage of electronically comparing the picker’s input against the desired pick plan for immediate validation and correction. On a paper-based system, you manually record the pick plan feedback using a RD device. Another option is to enter the data at periodic intervals using a stationary workstation equipped with a wedge.

PeopleSoft Manufacturing production picking presumes the warehouse will already have the required bar code labels in place to facilitate the data collection, such as item labels, storage location, bin, carton and package labels. Various bar code labels are available through the PeopleSoft Inventory label generation process.

When a pick batch is complete, or at designated time intervals, the collected data is transferred up to the main system to be processed and updated in the database. Any line transferred and residing in the bar code transaction log is considered available for processing.

The Production Pick Location process moves components to production from a storage location or container as per pick plan requirements. You can enter transactions using a bar code wedge reader or manually.

You can execute these electronic data collection transactions using the Production Picking component:

- M301 - Production Pick Location
- M302 - Production Pick Line Complete
- M303 - Production Pick Batch Complete

Pages Used to Process Pick Plans Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Production Picking	BCT_MG_PIK	Data Exchanges, Create Transactions, Manufacturing, Production Picking	Use to execute the Production Picking data collection on transactions.
Production Picking (background process)	BCT_MG_REQPICK	Data Exchanges, Process Transactions, Manufacturing, Production Picking	Use to continuously scan and process the electronic data collection transaction log as long as there are picking transactions in the log. There must be outstanding pick transactions in the electronic data collection transaction log.

Using Production Picking Transactions

Access the Production Picking page.

Pick Batch ID Select a pick batch.

Pick Line If you're using transaction M301 or M302, enter a value.

Complete Flag You can choose from these options:

- *Process Location*: Processes the entered values for the pick line location, and closes the pick line location against further transactions. Subsequent pick transactions can be entered for the pick batch. This value is used for transaction M301.
- *Process Location — Incomplete*: Processes the entered values for the pick line location, and will allow for additional pick transactions for this same pick line location. This value is used for transaction M301.
- *Pick Line Complete*: Processes the values for the current transactions and then closes the pick line against further transactions, clearing any remaining quantities for that line. This value is used for transaction M301.

- *Pick Batch Complete:* Processes the values for the current transaction before shutting the entire pick batch to subsequent transactions. All remaining quantities for the batch are cleared.
- *Pick Line as Planned:* Processes any values for the current transaction and then accept the quantities at the other locations for this line as reserved/designated on the pick plan. The line is then closed against further transactions. This completion level is appropriate for PUSH pick plans. This value is used for transactions M301 and M302.
- *Pick Batch as Planned:* Processes any values for the current transaction and then accept the quantities for all other lines and locations for this batch as reserved/designated on the pick plan. The batch is then closed against further transactions. This completion level is appropriate for PUSH pick plans.

Component ID

This field is used for transaction M301. If you're using the Issue method and as long as valid substitutes exist, substitutions can be made. If the issue method is Kit and the component has previously been picked, substitutions can't be made and the field is unavailable.

Quantity and Storage Loc
(storage location)

This field is used for transaction M301. Enter values for these fields.

The system displays the number of storage levels that have been defined for each storage location.



Click the Storage Location Search button to select a different storage location.

If you're issuing consigned kit issue components, including lot and serial-controlled components, you can pick from *both* owned and non-owned WIP storage locations.

Container ID

Enter the value If you're picking the item from a container.

Lot ID or Serial ID

Enter values if applicable.

If you are capturing rework or teardown production IDs that are using serial genealogy, please keep these in mind:

- If the assembly is serial-controlled and the Serial in Production option is selected and the component being issued is the assembly item, then you must enter a serial ID when prompted.
- If the assembly is not serial-controlled, but the Serial in Production option is selected, then you must enter a serial ID when prompted.

See [Chapter 22, "Issuing Material to Production," Processing Kit Issues and Returns, page 505.](#)

Note. You can correct transaction errors or view the transaction log on the Transaction Maintenance page.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, "Managing PeopleSoft Supply Chain Management Integration Points"

[Chapter 22, "Issuing Material to Production," Creating and Processing Picking Plans, page 488](#)

Processing Electronic Data Collection Picking Plan Transactions

Access the Production Picking process page.

Note. If no pick transactions are in the log when a process scans the log, the process terminates and can be restarted by the Process Scheduler. Use the Process Scheduler with the background process to ensure it runs continuously.

Process Frequency	Because the background processes for electronic data collection run continuously and you use the Process Scheduler to re-start the background processes, this value should be set to Always.
Run	Click to run this request at user-defined intervals. Select one of these processes: • <i>Production Picking Process (SFPEPICK)</i> • <i>Pick Process and Matl Release (SFPIKREL)</i>

Processing Kit Issues and Returns Using Electronic Data Collection

You can use electronic data collection to process kit issues and returns.

You can process kit issues and returns for these electronic data collection transactions:

- 060A - Kit Issue to Production
- 060R - Kit Return from Production
- 060S - Kit Issue Substitute to Prdn

See Also

PeopleSoft Inventory 8.8 PeopleBook, “Defining Your Operational Structure in PeopleSoft Inventory,” Defining Basic Business Unit Attributes

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items,” Establishing Item Shipping and Handling Attributes

Pages Used to Issue and Return Kit Components Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Kit Issue/Return	BCT_MG_MIS	Data Exchanges, Create Transactions, Manufacturing, Kit Issues/Returns, Kit Issue/Return	Use to enter issue/return transactions for kit components using electronic data collection.
Kit Issue/Return background process	BCT_MG_REQMISC	Data Exchanges, Process Transactions, Manufacturing, Kit Issues/Returns	Use to continuously scan the electronic data collection transaction log as long as there are Kit Issue/Return transactions in the log. There must be transactions in the electronic data collection transaction log.

Using the Kit Issue/Return Transaction

Access the Kit Issue/Return page.

Component ID	Enter the value of the component to be issued, returned, or substituted.
Sub Item (substitute item)	If you're substituting a component using transaction 060S, enter a value.
Quantity and Yield Loss Qty	Enter values to be issued, returned or substituted. These values must be <i>positive</i> numbers, even if you're returning material.
Container ID or Storage Area	Enter the location from which you issued the material.
	Click the Storage Location Search button to select a different storage location. If you're issuing consigned kit issue components, including lot and serial-controlled components, you can pick from <i>both</i> owned and non-owned WIP storage locations.
Serial ID or Lot ID	The system displays the values, if applicable. See Chapter 22, "Issuing Material to Production," Processing Kit Issues and Returns, page 505 .
Quantity	This value is display-only for serial-controlled items.

Note. The format for several quantity fields on this page may be determined by the item's unit of measure and quantity precision combination that was defined in PeopleSoft Inventory.

Processing Electronic Data Collection Kit Issue and Return Transactions

Access the Kit Issue/Return background process page.

Important! If no transactions are in the log when a process scans the log, the process will shut down and can be restarted by the Process Scheduler. Use the Process Scheduler with the background process to ensure it runs continuously.

Process Frequency

Because the background processes for electronic data collection run continuously and you use the Process Scheduler to re-start the background processes, this value should be set to *Always*.

Run

Click to run this request. Process Scheduler runs the Production Misc Issues/Returns (SFPFMISC) process at user-defined intervals.

CHAPTER 23

Completing Operations and Recording Scrap

This chapter provides an overview of the online completions process and describes how to:

- Record completed operations and scrap for in-house production IDs.
- Move completed end items and assign serial and lot numbers.
- Record completions and scrap for production IDs with multiple outputs.
- Record completed and scrapped end items for production schedules.
- Edit component lists.
- Use the Completions Update process.
- Create reversing entries to correct data entry errors.
- Complete production.
- Move excess inventory back to a stores location.
- View and report material shortages.
- View scrap and earned conversion cost information.
- Record and view actual machine and labor hours.

Understanding Recording Completions and Scrap

Within a manufacturing enterprise, there is a need to track end items as they make their way through the production area. With PeopleSoft Manufacturing, you can manage production by orders, repetitive schedules, backflushing, or creating a schedule to record completions and scrap after you have completed production. Subcontracted operations are fully supported. You can assign serial and lot numbers to completed end items and complete end items to containers while moving them to inventory or to another production area. While recording completed operations, the system accumulates manufacturing costs and variances. You can also record actual machine and labor hours for each production order or production schedule.

PeopleSoft Manufacturing tracks the serial genealogy of your production. This enables you to trace the movement of a specific serialized assembly and its components throughout the manufacturing process.

Note. During completions, you can choose from serial IDs previously associated with the production ID or you can enter a new serial ID and the serial association is automatically created.

PeopleSoft Manufacturing tracks the costs of material, labor, outside processing, and machines used to manufacture a product and manages the transactions necessary to report and track the status of a particular order or schedule by day/shift. The system supports these order types:

- Production IDs for regular, rework, or teardown production.
- Production schedules for tracking regular production by day/shift.

If you're recording completions and scrap for a production ID with subcontracted operations, you'll record the operation completions for the subcontracted operations slightly differently than for in-house production.

You can also record completions and scrap using electronic data collection.

See [Chapter 24, "Recording Completions and Scrap Using Electronic Data Collection,"](#) page 585.

Recording Completions with Multiple Outputs

You can also record completions and scrap for production IDs and production schedules that have multiple outputs. Multiple outputs consist of:

Primary items	The main outputs from the manufacturing process.
Co-Products	Items, along with the primary item, that are planned for and produced as part of the manufacturing process. Co-products share the cost of the process and there may be independent demand in planning for this item.
By-Products	Items that can be either waste by-products, which need to be disposed, or recycle by-products, which can be used as inputs to other processes. By-products are incidental to the process and will have either a relief (negative) cost for recycle by-products or a disposal (positive) cost for waste by-products. There would probably not be independent demand for by-products.

Expected Output when Using Yield by Operation

The system will recalculate the expected output quantities when over-completions or over-scrap are performed. Over-scrap is when the scrap quantity exceeds the expected scrap, based on the operation yield. For example, the system will recalculate a new output quantity if the actual scrap quantity exceeds the expected scrap quantity at an operation.

Transferring Completions Data to PeopleSoft Quality

If your installation includes PeopleSoft Quality, and you have defined quality configuration information and quality plans in PeopleSoft Quality for the manufactured item and its process, then the Qualitylink is active on the Record Completions/Scrap page. When you click this button, you can transfer to PeopleSoft Quality to initiate a data entry session to record quality control information for the manufacturing process.

Completions Actions and Effects to Quantities on Hand

This table lists the results of completions actions.

Completions Action	Results
Recording positive completions	Decreases the business unit's on-hand quantity of the components, and increases the business unit's on-hand quantity of the completed end item. Decreases the storage location's quantity for the components, and increases the storage location's quantity for the completed end item. Decreases the lot quantity on-hand for lot-controlled components and increases the lot quantity on-hand for the completed end item, if it is lot-controlled.
Recording negative completions	Increases the business unit's on-hand quantity of the components, and decreases the business unit's on-hand quantity of the end item. Increases the storage location's quantity for the components, and decreases the storage location's quantity for the end item. Increases the lot quantity on-hand for lot-controlled components and decreases the lot quantity on-hand for the end item, if it is lot-controlled.
Recording completions to a non-WIP, nettable location	Increases the business unit's quantity available for the completed end item.
Recording negative completions to a non-WIP, nettable location	Decreases the business unit's quantity available for the end item, if the end item comes from a nettable, available, non-WIP location.
Recording positive completions to a nettable, available WIP location	Increases a business unit's quantity reserved for the completed end item.
Recording negative completions from a nettable, available WIP location	Decreases a business unit's quantity reserved for the end item. Decreases the lot quantity available for the completed end item.

See Also

PeopleSoft Quality 8.8 PeopleBook, “Collecting Quality Data”

Chapter 25, “Subcontracting,” page 597

Chapter 8, “Maintaining Bills of Material,” page 147

Manage Production Using Discrete Orders

You can manage discrete orders for regular, rework, or teardown production by creating production IDs for each production quantity you want to track. Once you've created the production ID, you'll release production, and then either generate pick lists to issue material to production or maintain a maximum quantity on hand for components in a WIP location.

Once production begins on the shop floor, perform these steps. These steps assume that all operations are performed in-house and none of the operations are subcontracted.

To record completions and scrap for in-house production IDs:

1. Indicate whether your business unit will record completions and scrap production IDs using the online or deferred method by selecting the PID Completion Option on the MFG BU Prdn Options page. Select one of these:
 - a. Online: The background process calculates the associated production costs such as earned labor and machine hours, overhead conversion costs and consumes material utilizing the issue or replenishment issue methods.
 - b. Deferred: This option indicates that you're running the completions process at a later time. All associated production costs are calculated when using the completions update background process is run. You must run the Compl/Scrap Update Process (completions and scrap update process) if you select this option.
 2. Record completions and scrap quantities for in-house production using the Record Completions/Scrap page. Record completions by operation, by count point, or for the entire production quantity, or perform a partial backflush of completed end items.
 3. (optional) If you're completing a production ID with multiple outputs, the Outputs Detail area displays. You can complete planned or unplanned by products at any operation. Scrapped end items are recorded at the batch level, and not for each output. You must record completions and scrap for primary items and co-products at the last operation.
 4. (optional) Change component information using the Edit/Issue Components page.
 5. (optional) Transfer completions data to PeopleSoft Quality by clicking the Quality link.
 6. (optional) If you're using serial in production, serial- or lot-controlled items, and the components are issued to production using the Replenish or Issue method, you must select the serialized components or lots from which to consume the components.
 - a. Automatically generate serial numbers by using the Rapid Serial Numbers page.
 - b. Select the Edit/Issue Express page, and or click the button next to the serial- or lot-controlled component on the Edit/Issue Components Summary page.
 - c. Use the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area on the Record Completions/Scrap page to assign a lot if the completed end item is lot-controlled.
-
- Note.** You can move end items to an existing lot or create a new lot.
-
7. Move completed end items out of production. You may route them to a production ID, to another production area for further processing, or to a stores inventory location. You can't route waste by-products.
 - a. (optional) Click the Apply Defaults link to route the end items to a default putaway location.

Note. The completions process will put away items in their standard UOM.

- b. (optional) Select an alternate putaway location.

Note. If you're routing the end item to another production ID, the putaway process isn't required.

- c. If you are using serial genealogy, you must perform completions at the last operation. In addition, select the serial number for the appropriate assembly.
8. (optional) Run the Completions Update process. You'll run this process to update completions transactions that are staged by other processes, such as Edit Components updates, production completions, or subcontracted completions recorded through electronic data collection.
9. (optional) Make reversing entries to correct data entry errors. You can return components to their original storage location or to an alternate location. If you're returning lot or serial-controlled components, you must select the serial IDs or lot IDs from which the components were originally consumed.
10. (optional) Move excess components out of WIP locations using the Maintain Inventory navigation. You can move these components to another production area or back to a stores inventory location. You can also move excess components from the production ID using the Kit issues transactions. Kit issue transactions are used for components whose issue method is Kit.
11. Record actual labor and machine hours.
12. Indicate that production is complete by using the Complete Production page.

Manage Production by Day/Shift (Production Schedules)

PeopleSoft Manufacturing generates a schedule for processing by day and shift for regular production by:

- Creating a production schedule as part of the supply planning process.
- Creating a production schedule at the end of a production run.

Note. Production schedules support in-house production only. If you have subcontracted operations on a routing, you must use a production ID to track production.

Once you've created the production schedule, you'll release production, and then either generate pick lists to issue material to production or maintain a maximum quantity on hand for components in a WIP location.

If a production schedule hasn't been created, you can still record completions. At that time, the system will prompt you to automatically add the production quantity to the schedule.

To record completions and scrap for production schedules:

1. Record completions and scrap quantities for production schedules using the Record Completions/Scrap page. Record completions and scrap for the entire production quantity, or perform a partial backflush of completed end items. You can record completions for production schedules with multiple outputs. However, all multiple outputs and scrap must be completed at the last operation.

Note. If a schedule for the production date/shift hasn't been created when recording end item completions and scrap, the system creates a production schedule and releases production.

2. (optional) If you're completing a production schedule with multiple outputs, the Outputs Detail area displays. You can add unplanned by-products. Scrapped end items are recorded at the batch level, and not for each output.
3. (optional) Change component information using the Edit/Issue Components page.
4. (optional) Transfer completions data to PeopleSoft Quality by clicking the Quality link.
5. (optional) If you're using serial- or lot-controlled items, and the components are issued to production using the Replenish or Issue method, you must select the serialized components or lots from which to consume the components.
 - a. Automatically generate serial numbers by using the Rapid Serial Numbers page.
 - b. Select the Edit/Issue Express page, and or click the button next to the serial- or lot-controlled component on the Edit/Issue Components Summary page.
 - c. Use the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area on the Record Completions/Scrap page to assign a lot if the completed end item is lot-controlled.

Note. You can move end items to an existing lot or create a new lot.

6. Move completed end items out of production. You may route them to a production ID, to another production area for further processing, or to a stores inventory location. You can't route waste by-products.
 - a. (optional) Click the Apply Defaults link to route the end items to a default putaway location.

Note. The completions process will put away items in their standard UOM.

- b. (optional) Select an alternate putaway location.

Note. If you're routing the end item to another production ID, the putaway process isn't required.

7. (optional) Run the Completions Update process. You'll run this process to update completions transactions that are staged by other processes, such as Edit Components updates, production completions, or subcontracted completions recorded through electronic data collection.
8. (optional) Make reversing entries to correct data entry errors. You can return components to their original storage location or to an alternate location. If you're returning lot or serial-controlled components, you must select the serial IDs or lot IDs from which the components were originally consumed.
9. (optional) Move excess components out of WIP locations using the Maintain Inventory navigation. You can move these components to another production area or back to a stores inventory location.
10. Record actual labor and machine hours.
11. Run the Close Production SQR process to indicate that your production schedules are complete.

Integrating PeopleSoft Manufacturing to a Third-Party System

You can integrate PeopleSoft Manufacturing to an electronic data collection system or a Manufacturing Execution System (MES), or both.

Electronic Data Collection

You can use electronic data collection to collect completions and scrap transactions, then import them to PeopleSoft Manufacturing. You can also collect and import actual hours transactions using electronic data collection.

For actual hours, the data collection method employs the same breakout of hour types as the online method such as setup, run, fixed run, and post-production. Electronic data collection allows for individual or crew reporting as well as single or multiple machine reporting.

Use the Actual Hours EIP to import actuals hours information from a third-party system.

See [Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” page 585](#).

Manufacturing Execution System

If you’re integrating PeopleSoft Manufacturing to a MES, you can record operations completed, quantity completed and scrap quantity in the MES. You can then import completion transactions to enable the optimization of production activities from production order launch to completion of finished goods. All production IDs, production schedules, and operations must be recognized in PeopleSoft; otherwise the system marks the transactions as errors in Transaction Maintenance. You then need to make corrections so the transaction can be processed.

For multiple output transactions, you can record actual outputs in the MES, including completed quantities for co-products and by-products. You must send the completed output quantity if Batch Quantity Complete isn’t reported. You can’t report unplanned co-products, but you can report unplanned by-products.

You can also report the serial, lot, or container numbers for items produced or consumed in production. If the item requires lot, serial, or container details in PeopleSoft, the system marks transactions sent without this information as an error in Transaction Maintenance.

You can also report component consumption and communicate it to PeopleSoft Manufacturing using the Production Order Issue EIP. This EIP is a batch subscribe (inbound), asynchronous message.

When you pass component usage from the MES, all component consumption for a production order is sent, regardless of whether the quantity consumed was the default quantity. If components consumed are under serial or lot control, the lot or serial numbers are passed from the MES to update PeopleSoft Inventory.

The system validates component consumption transactions coming into PeopleSoft to ensure that the production IDs and items are valid in the business unit. The items must be valid for the BOM or as substitutes. If the consumption transaction would drive inventory negative in a business unit where negative inventory isn’t permitted, the system won’t process the transaction.

See Also

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points”

[Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” Recording Actual Machine and Labor Hours, page 593](#)

[Chapter 1, “Getting Started with PeopleSoft Manufacturing,” page 3](#)

Prerequisites

Prerequisites to recording completions and scrap include several steps.

Before you begin production, make sure you:

1. Review the production documents, if available, to determine if any of the items are serial- or lot-controlled, or if there are any subcontracted operations.
2. Verify that all items you'll be manufacturing have been assigned to a production area.
 - If your production item will have multiple outputs, you must first define the outputs by using the BOM Maintenance - Outputs page before generating your production ID or production schedule.
 - If you're tracking an item within a production area with production IDs, you must first generate the production ID for the item that you want to produce.
 - If you're using production schedules, you have the option of predefining the production quantity to be produced for a shift, or you can enter the quantity produced when recording end item completions.
3. Verify that material has been issued directly to the production ID or that the production WIP locations have been stocked with adequate inventory. You can use the Shortage Report to identify any potential component shortages before beginning production.

Common Elements Used in This Chapter

Production ID (production ID)	The production order identifier.
Production Area	The area where the item is being manufactured.
Item ID	The name and description of the item being manufactured.
Op Seq (operation sequence)	The operation step where the item is being completed.
Config Code (configuration code)	A unique identifier for costing and inventory tracking purposes. The configuration code displays if the end item is a configured item.
Status	The current status of the production.
Prdn Type (production type)	The type of production being manufactured. Can be <i>Production</i> , <i>Rework</i> , or <i>Teardown</i> .
Prdn Start Qty (production start quantity)	The beginning quantity being produced for the selected production. The system takes into account any operation yield.
Prdn End Qty (production end quantity)	The ending quantity being produced for the selected production. The system takes into account any operation yield.
BOM Code	The BOM priority code used during the production of this item.
Routing Code	The routing priority code used during the production of this item.

Revision code	The default value displays if the item entered is revision-controlled.
Source Cd (source code)	Indicates if the production is <i>Make</i> or <i>Buy</i> .
Quality	Click this link to initiate a data entry session and to transfer to either the Data Entry - Subgroup Method page or the Data Entry - Sample Method page in PeopleSoft Quality, depending on the data entry method you specified when creating the Quality Control Plan. On the Data Entry pages in PeopleSoft Quality, you'll record quality control information for the manufacturing process for the item and then transfer back to the Record Completions/Scrap page.
Note. The Quality link is available for each end item in the Output Details scroll area. You can transfer completions data to PeopleSoft Quality for each end item.	

Recording Completed Operations and Scrap for In-House Production IDs

At some point during the in-house production process, you must record completed operations and scrap. Using the Record Completions/Scrap component, you can:

- Record completed operations for all or part of your production quantity.
- Record completions and scrap for your production run with multiple outputs.
- Scrap end items at an operation.
- Completely backflush the entire production run or order.
- Report completed setup or post production work independent of recording the completion of any end items.
- Automatically consume components based on the quantity completed.
- Automatically complete end items based on the batch completed quantity.
- Manually substitute components where there is a shortage of an item or an item is out of stock.
- Transfer completions data to PeopleSoft Quality, if your installation includes PeopleSoft Quality, and you have defined quality configuration information and quality plans in PeopleSoft Quality for the manufactured item and its process. You'll record quality control information for the manufacturing process for the end item and then transfer back to the Record Completions/Scrap page.
- Assign serial numbers and lot numbers to completed end items before moving them out of the production area.
- Route completed end items to another production ID or WIP location to be used on subsequent end item production.
- Route completed end items (including primary items, co-products, and recycle by-products) to another production ID or WIP location to be used on subsequent end item production.
- Indicate production has been completed for the production ID.

Note. Primary items and co-products can only be completed at the last operation. By-products, such as recycle or waste, can be completed at any operation.

If you have enabled PeopleSoft Workflow, when you record end item scrap, the system sends notification to selected roles defined by you by using the Assembly PID Scrap Notification workflow. These roles could include a quality manager or a production control manager.

Understanding Recording Completions and Scrap for In-House Production IDs

With production IDs, you can:

- Record completions and scrap by operation.
- Record completions and scrap by count points.
- Record partial production completions.
- Complete the entire production ID.
- Move the completed end items to stock, or WIP location or another production ID.

Note. There is no difference between the method you use to record completed and scrapped end items for regular production and the method you use for rework production. When recording completions for teardown orders, you report the number of end items torn down. The system calculates the quantity of the teardown end items based on the quantity of the end items being torn down. As is the case with all production types, you can override the teardown quantity for each end item.

Using the Record Completions/Scrap component, you can record in-house operation or end item completions and scrap for production IDs with a status of:

- Entered or Firmed. The system automatically releases the production ID and the status changes to *In Process*. The ability to release a production ID with a status of Entered or Firmed is dependent on your Manufacturing business unit production options for the auto-release of production IDs. When setting up your business unit, you can select Prompt for Auto Release, Auto Release, or No Auto Release.
- Released. The system changes the status to *In Process*.
- In Process

Important! If you're using the production issue or production kit material issue method for regular production, you'll still have to issue material to the WIP locations using the Pick Plan and Material Release components. If you're using the production replenishment method, make sure that sufficient inventory exists in the WIP location.

Pages Used to Record Completions and Scrap for In-House Production IDs

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production ID to record completions and scrap. You must define at least one production ID.

Page Name	Object Name	Navigation	Usage
Record Completions/Scrap	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap	Enter completions and scrap information for production IDs. In addition, use this page to move end items for production IDs with a single output or multiple outputs.
Production Scrap Details	SF_COMPL_SCRAP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Enter Scrap Data link.	Enter scrap quantities, if applicable.
Apply Defaults	SF_COMPL_DEFAULTS	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Apply Defaults link.	Select the default putaway or alternate storage locations for the completed end items.
Rapid Serial Numbers (optional)	MG_SERIALRG_PG_SBP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Generate Serial IDs link.	Automatically generate serial numbers for production end items that are serial-controlled. Note. You must define serial-controlled items in PeopleSoft Inventory.
Work Center Details	SF_WORK_CTR_SP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click a Work Center link in the Operations Data scroll area.	View work center-related information such as WIP locations.
Lot/Serial Number Selection (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Select the serial numbers of the serial-controlled components to be consumed during the completions process. You must enter a pending quantity greater than zero for a serial-controlled component before the Lot/Serial scroll area becomes available.

Page Name	Object Name	Navigation	Usage
Lot/Serial Number Selection scroll area (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Identify the lots from which you want to consume lot-controlled components. You must enter a pending quantity greater than zero for a lot-controlled component before the Lot/Serial scroll area is available.
Complete Production	SF_COMPL_PRDN	Production Control, Process Production, Complete Production, Record Completions and Scrap Click the Complete Production link.	Indicate that production has been completed for a selected production ID.
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history for production IDs.
Transaction History Details (inquiry)	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View production transaction history details based on: • Completions Detail • Component Consumption • Operation Detail

Recording Completed Operations and Scrapped End Items for Production IDs

Access the Production Selection page.

Unit and Production ID Enter values for the production ID that you'd like to record completions and scrap.

Search Click to retrieve the selected production ID.

Defining Completions/Scrap Information for Production IDs

Access the Record Completions/Scrap page.

Production Selection		Record Completions/Scrap		Edit/Issue Components Summary		Edit/Issue Express		D				
Unit:	US008	☒ Serial in Prdn		Prdn Type:	Production	Process Monitor						
Production ID:	MDS_PR1	In Process		BOM Code:	1							
Production Area:	FINAL			Routing Code:	1							
Item ID:	SR3001			UOM:	EA	☐ Print at Save						
	Diablo 500 Touring Bike			Revision:	A							
Prdn Start Qty:	10.0000	Completed Qty:	2.0000	Putaway Action:	Setup Print Options							
Prdn End Qty:	10.0000	Scrapped Qty:	0.0000		Stage for Putaway at Save Time							
Prdn% Completed:	20.00				Complete Production							
Completed Qty:	5.0000	Op Seq:	40	Previous Operations								
Scrap Qty:	0.0000	Enter Scrap Data	Quality	☒ Update Prior Operations								
				Back Thru Operation: 0								
Operations Data												
Customize Find View All First 1-3 of 4 Last												
Op Seq	Work Center	Task Code	Count Point	Assy Starts Qty	Quantity Issued to Operation	Qty Cpl/Th	Assembly Qty Scrapped at Op	Expcd Cmpl Qty	Op Yld %	Setup Earned	Post Prod	Sub Op
10	FI-ASSY	FORK	N	10.0000	2.0000	2.0000	0.0000	10.0000	100.0000	Y	N	N
20	PAINT01	PAINT	N	10.0000	2.0000	2.0000	0.0000	10.0000	100.0000	Y	N	N
30	FI-ASSY	FINAL	N	10.0000	2.0000	2.0000	0.0000	10.0000	100.0000	Y	N	N

Record Completions/Scrap page

Previous Completions Information

Prdn Start Qty (production start quantity) and **Prdn End Qty** (production end quantity)

These default quantity values are the Production ID Maintenance component. These values are updated whenever the Qty Completed is changed.

Prdn% Completed (production percentage completed)

The percentage of the batch production quantity that has been completed prior to this transaction.

Completed Qty (completed quantity) and **Scrapped Qty** (scrapped quantity)

This quantity represents the quantity that has been completed at the last operation. Scrapped quantity represents the quantity that has been scrapped at all operations.

Putaway Action

Select which putaway process to use:

- *Putaway at Receipt Save Time:* Use this option to initiate the putaway process after you have recorded completions and saved the page. This method creates a schedule process, which automatically initiates the putaway process.
- *Stage for Putaway at Save Time:* Use this option to designate that these completions will use the PeopleSoft Inventory putaway process at a later time.

Note. Upon saving the page, you'll either stage the item for putaway or initiate the putaway process.

Item completions aren't allowed if the end item or a component of the end item is on Hold. Similarly, item completions are prevented if a co-product or recycle by-product is on Hold.

However, completions are allowed for waste by-products with a Hold status.

- Print at Save

Select this check box if you want to print production documents for this particular production ID at save time.
- Setup Print Options

Click this link to access the Process/Output Options page to select different print criteria for the production documents.

Recording Operation Completions

- Completed Qty (completed quantity)

Enter the entire production ID quantity or any portion of that quantity for each operation sequence that you want to record completions.

You can enter completions as many times as necessary to complete the production quantity for the production ID. For production IDs with a single output, this field represents the quantity completed at the operation sequence.
- Op Seq (operation sequence)

Select the operation step where the end items were completed. You can record partial completions by specifying any valid operation sequence, even if prior operation completions haven't been recorded.

If you're using count points and you enter an operation sequence that is not a count point then you can only record scrap. When using count points, completion quantities can only be entered at operations flagged as count point operations.
- Update Prior Operations

Select this option if you want to automatically record completions and scrap for prior in-house operations at the same time you're recording completions for this operation.
- Back Thru Operation

Indicate how far back you want to report completions by selecting the operation sequence. The quantity you're currently completing is added to any previously completed quantities - at *all* prior operations specified.

If you're using count points, this field displays the operation after the previous count point.
- Previous Operations

If you're recording prior operations at a later time, don't enter any information in this group box and make sure the Update Prior Operations check box is clear.
- 

Click the Refresh button to update the information in the Operations Data grid.

Viewing Operations Data

The Operations Data scroll area displays production details based on operation sequence. You can view operation related information such as assembly starts quantity, scrap quantities, expected completed quantity, and operation yield.

Click the Work Center link to view work center-related information.

Recording Completions - Example

Production Start Quantity: 10

Quantity Completed: 10

Completing at Operation Sequence: 30

In this example, you want to complete a quantity of 10 at operation sequence 30. You selected the Update Prior Operations check box on the Record Completions/Scrap page, and indicated that you wanted to update previous operations back to operation sequence 20. The system calculates any production and scrap completed at operation sequences 20 and 30.

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	0	0
30	0	0	0
40	0	0	0

Once you've completed 10 at operation 30 and updated back through 20, the operations would look as follows:

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30	10	10	0
40	10	0	0

Warning! You can't update prior subcontracted operations using this option. If there is a prior subcontracted operation and the Update Prior Operations check box is selected, the system will ignore the subcontracted operation when recording the prior operations as completed. Use the Subcontract Receipt component to record completed operations and scrap for the subcontracted operation.

Completing Less Production End Quantity than Expected — Using Yield by Operation

When using yield by operation, the beginning production quantities at subsequent operations are affected when either good or scrap production quantities are greater than expected. This example illustrates the effect of yield by operation when you scrap more end items than you originally expected.

Operation Sequence: 30

Operation Start Quantity: 80

Operation Yield: 98%

Scrapped Quantity: 5

Operation Sequence	Operation Start Quantity	Quantity Issued to Operation	Quantity Completed Through	Quantity Scrapped	Expected Completed Quantity	Operation Yield Percentage
10	80	80	80	0	80	100
30	80	80	70	5	75	98
40	75	70	0	0	75	100
50	75	0	0	0	67	90

In this example, a quantity of 80 was issued and completed through operation 10. Since there is a 100% operation yield, a quantity of 80 is expected at the end of this operation. The original quantity complete at operation 50 was 70.

However, at operation 30, there is a 98% operation yield and overscrapping of a quantity of 5 also occurs. This means that out of the operation start quantity of 80, only 75 are expected to be completed. As these 75 flow through operations 40 and 50, further loss is expected at operation 50 and the expected completion quantity for the order is now 67.

Completing More than Expected — Yield by Operation Example

This example illustrates the effect of yield by operation on subsequent operations when you scrap fewer end items than you originally anticipated:

Operation Sequence: 30

Operation Start Quantity: 69

Operation Yield: 98%

Scrapped Quantity: 0

Operation Sequence	Operation Start Quantity	Quantity Issued to Operation	Quantity Completed Through	Quantity Scrapped	Expected Completed Quantity	Operation Yield Percentage
10	69	69	69	0	69	100
30	69	69	69	0	69	98
40	69	69	69	0	69	100
50	69	0	0	0	62	90

In this example, a quantity of 69 was issued and completed through operation 10. Since there is a 100% yield, a quantity of 69 is expected at the end of this operation. The original quantity expected complete at operation 50 was 60.

However, at operation 30, there is a 98% operation yield and under-scrapping occurred (scrapped less than expected). Out of the operation start quantity of 69, all were completed and will continue to flow through production. As these 69 flow through operations 40 and 50, further loss is expected at operation 50 and the expected completion quantity for the order is now increased to 62.

See Also

Chapter 25, “Subcontracting,” page 597

Recording Scrapped End Items

Access the Production Scrap Details page.

Scrap Qty (scrap quantity)	Enter an amount if scrap was generated during production. Scrap can be recorded at any operation sequence, even if you’re using count points. For production IDs with a single output, the scrap quantity represents the number of scrapped end items at the operation sequence. For production IDs with multiple outputs, this field represents the number of scrapped end items for the batch (BOM) quantity, and not for each output. If the scrap at an operation exceeds the expected scrap quantity, you should create a new planned production order to meet your demand. For serial genealogy production, you may enter the specific serial ID that is being scrapped. If the serial ID has not previously been associated you will be given the option to create the association. If a routing has operation yield, a reported scrap quantity which is not equal to the expected scrap quantity will change start and end quantities at subsequent operations. It will also change the expected end quantity for the production order. Note. If the scrap quantity is greater than the production end quantity, the system will update the production start quantity so that the ending production quantity will meet demand.
Reason Code	Select a value. This field indicates why the end item was scrapped. Scrap reason codes were previously defined using the Reason Code pages in the Set Up Financials/Supply Chain navigation. This field is required when a scrap quantity is entered.
Scrap Pct (scrap production percentage) (optional)	This field indicates the percentage that the end item was completed at the operation where the scrap occurred. For example, if the scrapped end items were 75% complete before they were scrapped, enter that percentage here. In this example, when calculating the cost of scrapped end items, the system will allocate all prior operation costs, plus 75% of the run time costs of the operation where the scrap occurred to each scrapped end item. This percentage is used to calculate the amount of conversion costs earned and scrapped at this operation. If no value is entered, 0 appears in this field.
Distrib. Type (distribution type) (optional)	This field indicates the transaction distribution type for the scrap transaction. The distribution type in combination with the scrap transaction determines

the correct accounting entries to post the scrap loss to the general ledger. The system displays the default distribution type for the production scrap transaction group. Default distribution types are defined using the Default Distribution Types page in Design Inventory Accounting. You can override the distribution type for each transaction.

Note. If you're scrapping production that has an operation yield less than 100%, the scrap cost calculation is not performed.

The difference in expected and actual scrap is recorded as operation yield variance.

With production IDs, you have the option of scrapping end items at any operation or at the end of production when you can complete end items to stock or another production area. If you're recording scrap at an intermediate operation on a multiple output production ID, you're recording the scrap quantity for the batch and not the individual output items.

When recording scrap at an intermediate operation, the scrap quantity is associated only to the operation where the scrap was recorded. However, if you have selected to complete back through prior operations, the scrapped quantity will be presumed to have been completed at those prior operations.

Example of scrapping at operation 30 and completing back through operation 10

With no prior completed quantity, if you scrap 10 units at operation 30, the operation list would look as follows:

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30	10	0	10
40	0	0	0

Note. You can't record scrap at the output level. Scrapped end items for production with multiple outputs are recorded at the *batch* (BOM) level.

Recording Scrap When Using Count Points

When using count points, scrap can be recorded at any operation, regardless of the count point designation. The system updates the scrap quantity for the operation where the scrap occurred. In addition, the system assumes the scrapped quantity was completed at all previous operations up to the previous count point.

Count Point Operations: 30, 60

Production Start Quantity: 15

Step 1

Production Start Quantity Previously Completed/Issued: 10

Operation Sequence	Quantity Issued	Quantity Completed/ Thru	Quantity Scrapped
10	10	10	0
20	10	10	0
30 (count point)	10	10	0
40	10	0	0
50	0	0	0
60 (count point)	0	0	0

Step 2:

Scrap Quantity: 5

Scrapping at Operation Sequence: 30

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	15	15	0
20	15	15	0
30 (count point)	15	10	5
40	10	0	0
50	0	0	0
60 (count point)	0	0	0

Example 2

Production Start Quantity Previously Completed/Issued: 10

Scrap Quantity: 5

Scrapping at Operation Sequence: 50

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30 (count point)	10	10	0
40	10	0	0
50	0	0	0
60 (count point)	0	0	0

In this example, you have recorded scrap at a non-count point operation. In this case, the system will record completions for any previous operations back to the operation after the previous count point (operation 40).

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30 (count point)	10	10	0
40	10	5	0
50	5	0	5
60 (count point)	0	0	0

Once an end item is scrapped, the scrap end item value is calculated and expensed. Item costs for expensed and floor stock items aren't included in the end item scrap cost. The end item, including the components used to that point, and the labor, machine, and overhead costs earned to that point are no longer accounted for in WIP inventory.

Note. If you record scrap for an operation that precedes a subcontracted operation, and the purchase order has already been generated for the production quantity, the system sends a purchase order change request to PeopleSoft Purchasing, indicating a change in production quantity. This change must be processed before the end items are sent to the subcontractor.

See Also

Chapter 25, “Subcontracting,” page 597

Recording End Item Completions Using Count Points

You can use count points to record end item completions.

To record completions and scrap for production IDs using count points:

1. Access the Record Completions/Scrap page.
2. Enter the Completed Qty (completed quantity) for the operation sequence. If you enter the completed quantity first, only the count point operation steps are available.
3. Select the Op Seq (operation sequence) that is a count point. If you click the operation sequence look up without entering a completed quantity, all operation sequences are displayed.

Note. When you record completions at the last operation (which must be a count point), the system assumes you have or will complete at all prior count points. Therefore, the completed quantity is updated only back to the prior count point.

Since the system automatically completes back to the operation after the previous count point, the Update Prior Operations and the Back Thru Operation fields are unavailable and the field defaults to the operation after the prior count point (operation sequence). This indicates that the quantity completed will also be recorded for operations up to, but not including, the prior count point. If you’re recording completions at the first count point, the system will automatically complete back through and including the first operation.

4. All other processes, such as entering scrap data and routing completed end items remain the same as those used with completing production IDs at intermediate operations.

Recording Completions Using Count Points - Example

Count Point Operations: 30, 50

Production Start Quantity: 10

Step 1

Quantity Completed: 10

Count Point at Operation Sequence: 30

In this example, you want to complete a quantity of 10 at operation sequence 30, which is a count point. The system calculates any production and scrap completed at operation sequences 10, 20, and 30.

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30 (count point)	10	10	0
40	10	0	0
50 (count point)	0	0	0

Step 2

Quantity Completed: 5

Count Point at Operation Sequence: 50

In this example, you want to complete production for a quantity of 5 at operation sequence 50, which is a production ID count point. The system doesn't include operation sequence 30 because it is the prior count point.

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30 (count point)	10	10	0
40	10	5	0
50 (count point)	5	5	0

Recording End Item Completions at the Last Operation

You can record completions at the last operation.

To record completions at the last operation:

1. Access the Record Completions/Scrap page.
2. Enter the last operation on the operation list in the Op Seq (operation sequence) field if you want to complete all operations for the production ID, and all of the operations are performed in-house.
3. Select Update Prior Operations, then select the first operation from the Back Thru Operation options.

4. Enter the number of completed end items in the Completed Qty (completed quantity) field. You can record completions for the entire production quantity for the production ID or any portion of the quantity.
5. All other processes, such as entering scrap data and routing completed end items remain the same as those used with completing production IDs at intermediate operations.

Note. Co-products can only be completed at the last operation.

See Also

Chapter 23, “Completing Operations and Recording Scrap,” Moving Completed End Items and Assigning Serial and Lot Numbers , page 543

Moving Completed End items for Production IDs with a Single Output

Access the Record Completions/Scrap page.

When completing end items at the last operation, the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area on the Record Completions/Scrap page becomes available. You can route the completed end items to a storage area, another production ID, or to a WIP location. Additionally, if the end item is lot- or serial-controlled or if you’re utilizing containers, you can assign serial numbers, lot ID, or container ID to the completed end items.

If a default putaway location is defined for the end item, you can route the completed end items to that location using the routing portion of the page.

Click Apply Defaults to indicate that you want to put away the end items to the default putaway location.

Note. The completions process will put away items in their standard UOM.

Moving Completed End Items and Assigning Serial and Lot Numbers

Once you have recorded completions for the last operation sequence on the operation list, you can move the completed end items:

- To predefined stores locations within PeopleSoft Inventory. Use this method when you want to putaway completed end items to a default stores locations defined in PeopleSoft Inventory. After completing the last operation, use the Completions/Scrap Update Process. There is no need to use the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area unless you need to identify serial numbers, lots, or containers.
- To other production areas in order to fulfill component requirements and relieve shortages out on the shop floor. Use the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area to move the completed end items.
- To a specific location where you want to stock the completed end item. Use the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area to specify the location.

- To a production ID, if the end item is a component on a higher level end item using the Kit issue method. This bypasses the putaway process into inventory. You can use the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area to specify the production ID.
- In addition, select the serial number for the appropriate assembly that is being completed and moved.
- For serial genealogy production, you must enter the specific serial ID that is being completed. If the serial ID has not previously been associated you will be given the option to create the association.

If you're assigning a lot or serial number for teardown outputs that were based on an original production ID's components, the system compares the new lot or serial number to the original component serial or lot numbers and issues a warning if they are different.

Note. If the assembly is serial in production and you are tearing out a serial ID that has not been issued to this assembly, you'll receive this message: "Tearing out more than has been issued to the original assembly serial. Okay to continue?" Double check your quantity and serial ID. Hit OK to continue or cancel to change information. The edit check is only looking one level deep, not through all the nested subassemblies.

Route-To PID/Stor Locations

When you route to a Prdn ID (production ID), the system checks that:

1. The item being completed is a component of the production ID parent item.
2. Its issue method is Kit.
3. The production ID status is *Released* or *In Process*.
4. The shortage quantity is greater than zero.

When routing an end item to another production ID from a production ID, you needn't run any putaway processes. The system automatically updates the issue quantity for the component on the target production ID as well as the quantity completed for the source production ID.

However, if you're routing the end item to a production ID from a production schedule, you still need to run the Completions Update (SFPDCDRV) process to update the production information for the production schedule, either at save time or as a deferred process.

Note. You can't route waste by-products. They will be expensed in the same manner as scrapped end items.

Capacity Checking

You activate weight and volume capacity checking on the PeopleSoft Inventory Options page. You can define the capacity for each storage location on the Volume/Weight Capacity page, which you can access from the Material Storage Locations page.

If the item is designated as an Isolate Item on the Inventory-Shipping/Handling page in the Define Business Unit Item component, the item can only be put away or transferred to empty storage locations or to locations containing stock with the same item ID. The system prevents you from putting away an Isolate Item to a location with other items.

If you designate a storage location as storing only one item on the Volume/Weight Capacity page, the system only puts away material with that item ID in the location. If you don't specify an item ID for a single-item storage location, the first putaway transaction to the empty storage location defines the only item ID that the location can contain until the item quantity has been fully depleted.

Prerequisites

Before you move the items to another WIP location, production ID, or an inventory stores location:

- Assign serial and lot numbers to the completed end items if the completed end items are serial- or lot-controlled.
- Optionally identify a container to which you want to move the completed end items.
- Select the production ID to which the completed end items will be moved.

Pages Used to Move End Items for Completed Production

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production ID or production schedule.
Record Completions/Scrap page - Route-To PID/Stor Locations (route to production ID and storage locations) scroll area	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap Enter a Completed Qty (completed quantity) and the last Op Seq (operation sequence) to access the Route-To/PID Stor Locations (route to production ID and storage locations) scroll area.	Move completed end items to a production ID or to a storage location.
Shortages	SF_COMPL_SHORTAGE	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap Click the Shortages button in the Route to PID/Storage Locations scroll area.	Select a production ID to which you want to route the completed end item.

Moving End Items for Completed Production

Access the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area on the Record Completions/Scrap page.

Route-To-PID/Storage Locations scroll area

You can move the completed end items to a storage area, another production ID, or to a WIP location. In addition, if the end item is lot- or serial-controlled or if you’re using containers, you can assign serial numbers, a lot ID, or a container ID to the completed end items using this portion of the page.

Note. If you’re completing operations at an operation sequence where a by-product is generated, the Route-to PID/Stor Locations (route to production ID and storage locations) scroll area will be displayed. However, the operation sequence for all end items, *except by-products*, will be unavailable.



Click the Shortages button on the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area on the Record Completions/Scrap page.

See [Chapter 23, “Completing Operations and Recording Scrap,” Viewing Production Shortages, page 546.](#)

Storage Areas

You can choose different storage areas by different levels such as Area, Lev 1, Lev 2, and Lev 3.



Click the Storage Location Search button and click the Storage Location Search link to select a different storage location.

Quantity

Enter the number of completed end items being routed.

Viewing Production Shortages

Access the Shortages page.

A component is considered short if the pending consumed quantity or the pending yield loss quantity is greater than zero. The production ID is *In Process* or *Pending Complete* if the issue quantity is less than the current scheduled quantity.

Route-To Production ID

Selection

Select this option use the completed end items on the production ID with shortages.

OK

Clicking this button causes the production ID to appear in the To Prdn ID (to production ID) field in the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area on the Record Completions/Scrap page.

Routing to IDs and Storage Areas

You can apply the default storage location or production ID to the entire production quantity or to each output, or you can route multiple quantities to different locations or production IDs by adding rows. For each row, you can only select either a storage location or a production ID for the entered quantity. If a storage location is specified, you can’t route end items to a production ID. If you route to a production ID, you can’t route to a specific storage location.

Quantity

Enter the number of end items to be routed.

Orig Comp ID (original component ID)

Displays if the end item is a substitute.

Save

Click to route your completed end items.

Selecting Default Putaway Storage Locations

Access the Apply Defaults page.

Deft Storage Loc (default storage location)

The system displays the default putaway location for the completed end items, if defined. When you accept the defaults in these fields, the completed end items is automatically moved to the default putaway location for the item when you run the PeopleSoft Inventory putaway process.

If you aren't going to move the completed end items to the default storage location, you can select a specific location or route them to another WIP location where they can be used on a higher level end item.

The system displays the number of storage levels, such as *Aisle*, *Level 1*, *Level 2*, *Level 3*, and *Level 4*, that have been defined for each Storage Area.

Note. The completions process will put away items in their standard UOM.

Directed Putaway

If you don't enter a storage location, you aren't routing to a production ID, and you have activated Directed Putaway for your business unit, the system uses the Directed Putaway method to select a storage location. While running the Load Stage process, the system determines the location that best meets the predefined rules for Directed Putaway. You activate Directed Putaway and set up putaway rules on the Putaway Rules page in PeopleSoft Inventory.

Assigning Containers

Access the Record Completions/Scrap page.

Container ID

Select a value in the Output Details scroll area if you want to complete to a container. The system assigns this container ID to all the end items that are indicated as completed on the Record Completions/Scrap page. You can select from existing containers, or you can create a new container ID.

If the Container ID is specified, you can't route end items to a production ID, and the default To Prdn ID (to production ID) and Area fields are unavailable.

Generating Serial Numbers

Access the Rapid Serial Numbers page.

Rapid Serial Numbers

Serial Number Count:5

Serial ID Parameters

Serial Number Prefix:MFG000☐Generate Blank Rows

Multiplier:1

Serial Number Length:7☒Zero Pad

Start Num:1

OK

Cancel

Rapid Serial Numbers page

Serial Number Count

The number of completed end items that the system will assign serial numbers. A serial number will be assigned to all the end items indicated as completed on the Record Completions/Scrap page.

Serial ID Parameters

Displays default information from the Automatic Serial Number page.

Serial Number Prefix, Multiplier, Serial Number Length, and Zero Pad

You can use the default values for the business unit/item or you can override these defaults here.

The Serial Number Prefix can contain up to three alphabetic and numeric characters.

The Multiplier field Indicates the increment in which to assign serial numbers. For example, a multiplier of 1 increments each serial number that the system assigns by one. If the last serial number assigned was MFG00001, then the next serial number is MFG00002.

Select Zero Pad if you want to use zeroes as placeholders for the serial number length you defined.

Use the Start Num (start number) field to specify the first serial number that you want to assign to the completed end items. If you enter a specific starting number, the serial numbers begins with that starting number. The default for this field is blank, and you don’t have to enter a starting number. If you leave the field blank and click OK, you’ll receive a warning that the starting serial number is blank and defaults to zero. In this case, the starting serial number will be MFG00000. If you enter 1 in this field, the starting serial number will be MFG00001.

OK

When you click this button, each completed end item, along with its corresponding serial number, displays on the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area in the Record Completions/Scrap page

Selecting a Lot ID

If the end item is lot-controlled, select the Lot ID to which you're assigning the completed end items. The system assigns the specified Lot ID to all the end items indicated as completed on the Record Completions/Scrap page. You can select from existing lots, or you can create a new lot ID.

Staging End Items for Putaway

You can move completed end items for putaway.

To move completed end items to a stores or other inventory location, complete these tasks using PeopleSoft Inventory:

1. Run Load Staged Items process. The system suggests the location where the end item should be put away. If you have entered a location on the Route-To PID/Stor Locations scroll area, the system stocks the completed end items in the specified location. If you select Flag Items for Autoputaway, you can bypass the Stockroom Feedback process and run the Putaway page. To streamline the process, you can run the multi-step process using PeopleSoft Inventory Auto Putaway.
2. Run Stockroom Feedback process. This page enables you to change the location suggested by the load staged items process.
 - If you're satisfied with the putaway location suggested by the system, you must first select the putaway check box, if it isn't selected. Then click Putaway to initiate the putaway process.
 - If necessary, change the location. Then click Putaway to initiate the putaway process.
 - If you selected Flag Items for Autoputaway on the Load Staged Items page, you don't need to run the Stockroom Feedback process.
3. Run the Putaway page. This processing page updates the stock location with the quantity received from the WIP location.

Putaway at Receipt Save Time

Use this option to initiate the putaway process after you have recorded completions and saved the page. This method creates a schedule process which automatically initiates the putaway process.

Recording Completions and Scrap for Production IDs with Multiple Outputs

You'll use the Record Completions/Scrap component to record completions and scrap for production that generated multiple outputs: primary items, co-products, and recycle and waste by-products.

See Also

PeopleSoft Inventory 8.8 PeopleBook, "Receiving and Putting Away Stock"

Pages Used to Record Completions and Scrap for Production IDs with Multiple Outputs

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production ID with multiple outputs. You must define at least one production ID.
Record Completions/Scrap - Output Details scroll area	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap	Enter completions and scrap information for production IDs with multiple outputs. This scroll area on the Record Completions/Scrap page becomes available when you select a production ID with multiple outputs. Enter an Op Seq (operation sequence), and then press Tab.

Entering Completions Quantities for Production IDs with Multiple Outputs

Access the Output Details scroll area on the Record Completions/Scrap page.

Output Details Find | View All First 1 of 3 Last

*Output Type: Primary *Output Item: 000000000000000020013

Op Seq: Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream

Completed Qty: 10.0000 GAL Output Qty: 100.0000 Per: Asy Quality

Output Schd Qty: 100.0000 Qty Compl To Date: 0.0000 Res %: 100

Container ID: Apply Defaults

Route-To PID/ Storage Locations Customize | Find | View All First 1 of 1 Last

To Prdn ID	Area	Lev 1	Lev 2	Lev 3	Quantity	Orig Comp ID
					0.0000	

Output Details scroll area (Record Completions/Scrap page)

To enter batch completions quantities (for production IDs with multiple outputs):

1. Access the Record Completions/Scrap page.
2. Enter a Completed Qty (completed quantity) and select an Op Seq (operation sequence).
The Output Details scroll area becomes available.

Note. If you're recording completions at an intermediate operation, the system displays all by-products. If you're completing operations at the last operation, the system displays all outputs: primary, co-products, and by-products.

3. (optional) ClickView All to display all end items being completed.
4. Enter the Completed Qty (completed quantity) for each output. The completed quantity for each end item is calculated based on the batch (BOM) quantity. You can, however, override the output quantity for each end item.
5. (optional) Click Add to add by-products.
 - a. Select the Output Type—you can only add *Recycle* or *Waste* by-products.
 - b. Select the Output Item.
 - c. Select the Op Seq (operation sequence) where the by-product is being generated. The default operation sequence is zero, and if you don't change the default, the system treats it as the last operation.
 - d. Enter the Output Quantity based on per end item or per order.
6. Click Save to process the multiple output completion.

Output Details

Qty Compl to Date (quantity completed to date)	Represents output production quantities completed prior to this transaction.
Output Schd Qty (output scheduled quantity)	Represents the total scheduled output production end quantity. This is the output quantity you expect to produce for each output. This field is display-only for primary items and co-products.
Output Quantity	Represents the output production quantities based on per assembly or per order. You can adjust this field for by-products. You can't change the Output Quantity for primary or co-products on this page.
Quantity Per	Indicates whether the quantity required is per <i>Asy</i> (assembly) or per production <i>Ord</i> (order).
Res % (resource allocation percentage)	Determines how much of the BOM batch quantity the primary items and co-product represents. It is used during completions to determine what percentage of the components should be consumed for the primary and co-product. The total resource allocation percentage should always equal 100%.

Batch Calculation - Example

If you entered a completed quantity of 5 on the Record Completions/Scrap page, the system calculated each output quantity based on this quantity of 5. However, you can change the Completed Qty (completed quantity) for any of the outputs in the Output Detail scroll area. Overriding the completed quantity at the output level for primary and co-products recalculates the batch completed quantity using the resource percentages defined on the BOM.

Over-Completing Production IDs

There may be situations when you need to over-complete your expected production ID quantities. For example, perhaps the oranges you used to make orange juice were a bit juicier than normal, and instead of producing 75 gallons of orange juice, you actually produced 80. If this is the case, you would enter 80 in the Completed Qty (completed quantity) field on the Record Completions/Scrap page. When you tab out of the field, you'll receive a message indicating that the output item's completed quantity is greater than the production quantity.

When you click OK, the system recalculates the completed quantity for all output items based on this new quantity.

Note. If you want to change the production quantities for the batch, which changes the primary and co-product quantities, change the production start quantity or production end quantity for the production ID on the Production ID Maintenance page.

Moving Completed End Items for Production IDs with Multiple Outputs

After recording completions for production IDs with multiple outputs, you can route each completed output to a storage area, another production ID, or to a WIP location.

See [Chapter 23, "Completing Operations and Recording Scrap," Moving End Items for Completed Production, page 545.](#)

Editing or Issuing Components During the Completions Process

Use the Edit/Issue Components pages if you want to modify or view the components that will be consumed based on the quantity completed or scrapped, or if you need to select the serial or lot numbers for those components that were consumed when you recorded your completion.

See [Chapter 23, "Completing Operations and Recording Scrap," Editing Component Lists, page 559.](#)

Recording Completed and Scrapped End Items for Production Schedules

For production schedules, you can record partial production completions, or you can complete the entire schedule.

Use the Record Completions/Scrap component to:

- Record completed operations for all or part of your production quantity.
- Record completions and scrap for production schedules with multiple outputs.
- Scrap end items.
- Completely backflush the entire production run or order.
- Automatically consume components based on the quantity completed.
- Automatically complete end items based on the batch completed quantity.

- Manually substitute components where there is a shortage of an item or an item is out of stock.
- Assign serial numbers and lot numbers to completed end items before moving them out of the production area.
- Route completed end items, including primary items, co-products, and recycle by-products, to another production ID or WIP location to be used on subsequent end item production.
- Indicate production has been completed for the production schedule.

If you have enabled PeopleSoft Workflow, when you record end item scrap, the system sends a notification by using the Assembly Prdn Schedule Scrap Notification workflow to selected roles defined by you. These roles could include a quality manager or a production control manager.

Using this component, you can record in-house operation or end item completions and scrap for production schedules with a status of:

- Entered or Firmed: The system automatically releases the production schedule, and creates the component list and operation list (if a routing exists). The status is automatically changed to In Process.
- Released: The system changes the status to In Process.
- In Process

If you're using production issue or production kit method for regular production, you'll still have to issue material to the WIP locations using the Pick Plan and Material Release components. If you're using the production replenishment method, make sure that sufficient inventory exists out in the WIP location.

Note. Quantities of an item that are stored in a nettable, available WIP location and reserved for production use aren't available for other purposes.

You can record in-house operation or end item completions and scrap for production quantities that haven't been previously entered as scheduled quantities.

In this case, the system will prompt you for the schedule quantity and the production schedule will be automatically created with a status of *In Process*. You can then backflush a partial quantity or the entire production quantity and record any scrap.

- If you're using the production issue method, you'll still have to issue material to the WIP locations to ensure there is sufficient quantity on hand to satisfy the production schedule quantities.
- If you're using the production replenishment method, make sure that sufficient inventory exists out in the WIP location.

This section discusses how to:

- Record completed and scrapped end items for production schedules.
- Peg to a production schedule.
- Define completions and scrap information for production schedules.
- Record completions and scrap for production schedules with multiple outputs.
- Transfer completions data to PeopleSoft Quality.
- Move end items for production schedules.

Common Elements Used in This Section

Prdn Start Date (production start date) The date that the production was due to begin.

Prdn Due Date (production due date) The date that the production is due to be completed.

Date Type The date used as a sort option for the production schedule - either by production start or production due date.

Sch Method (scheduling method) For production schedules, *Backward* is always used.

Pages Used to Record Completions and Scrap for Production Schedules

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production schedule to record completions and scrap. You must define at least one production schedule. Note. The production status should be Released or In Process.
Schedule Selection	SF_PA_SCH_PEG_SP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection Enter the Production Area and Item, and then click the Peg Schedule link.	Peg completions to a specific production schedule row.
Record Completions/Scrap	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap	Enter completions and scrap information. In addition, use this page to move end items for production schedules with a single output or multiple outputs.
Production Scrap Details	SF_COMPL_SCRAP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Enter Scrap Data link.	Enter any scrap quantities.

Page Name	Object Name	Navigation	Usage
Apply Defaults	SF_COMPL_DEFAULTS	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Apply Defaults link.	Select the putaway locations for the completed end items.
Rapid Serial Numbers (optional)	MG_SERIALRG_PG_SBP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Generate Serial IDs link.	Automatically generate serial numbers for production end items that are serial-controlled. Note. You must define serial-controlled items in PeopleSoft Inventory.
Work Center Details	SF_WORK_CTR_SP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click a Work Center link in the Operations Data scroll area.	View work center-related information such as WIP locations.
Lot/Serial Number Selection (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Select the serial numbers of the serial-controlled components to be consumed during the completions process. You must enter a pending quantity greater than zero before the Lot/Serial scroll area becomes available.
Lot/Serial Number Selection scroll area (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Identify the lots from which you want to consume lot-controlled components. You must enter a pending quantity greater than zero before the Lot/Serial scroll area is available.
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history for production schedules.
Transaction History Details inquiry	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View completions details based on your selection criteria.

Recording Completed and Scrapped End Items for Production Schedules

Access the Production Selection page.

Unit, Production Area, and Item ID

Enter values for the production schedule.



Click the Item Search button to access the Item Search Criteria Page to locate a different item.

Peg Schedule

Click this link if you want to select a specific production schedule.

BOM/Rtg Code Effective Dates

Because only one active BOM/routing combination is valid for an area at any one time, select the valid BOM/routing combination for accurate component consumption. By selecting an effective date in the BOM/Rtg Effdt (BOM/routing effective date) field, you determine the particular BOM/routing combination for which you want to complete. The BOM/Rtg Effdt - which defaults to the current date - determines which combination the system selects and displays in the BOM Code and Routing Code fields.

For non-revision-controlled items, this BOM/routing date is used to decide which BOM/routing combination will be used and a second effective date will be used for the components and outputs. If the item is revision-controlled, then both an item Revision code and BOM/Rtg Effdt date must be selected.

Note. Because you can create multiple schedules per area—with only one combination effective at any one time, production schedules for prior effective date ranges may not be consumed if the effective date range for the combination has passed. For example, if you have BOM code 1 and routing code 2 valid from 1/1/01, but BOM code 2 and routing code 2 is valid from 6/1/01 for the same production area, then you could create production schedules for the 1/2 combination prior to 6/1/01 but completing them after this date. In this case, the system won't be able to consume for them because the new BOM/routing combination has taken effect. In addition, you will get an auto-add message when you attempt to complete because no schedules currently exist for the 2 /2 combination. However, if you change the BOM/Rtg Effdt back to a date prior to 6/1/01, the system will pick up the correct combination.



Click the Select BOM/Routing button to access the Select BOM/Routing page to select a different BOM/routing combination. This selection also shows the effective dates of the BOM/routing combinations.

Revision

You can change the revision code if you're building to a different revision. If the item isn't revision-controlled, the current date is displayed in the Eff Date (effective date) BOM configuration used to create the component list.

Negative Completions

Select this check box if you are reversing a previous completions or scrap transaction.

See [Chapter 23, “Completing Operations and Recording Scrap,” Creating Reversing Entries to Correct Data Entry Errors, page 571.](#)

Search Click to retrieve the selected production schedule.

Pegging to a Specific Production Schedule

Access the Schedule Selection page.

Schedule Selection


Unit: US012
Production Area: SAUCEFG Bottled Sauce Area
Item ID: 000000000000020036 Creamy Tomato Sauce Bottled, 2
From Date: 09/30/2003  **To:** 10/02/2003 

Date Type
☐ Prdn Start ☒ Prdn Due

List of Production Schedules
Customize | Find | View All | 
First  1 of 1  Last

Sel	Prdn Due Date	Prdn Due Shift	Prdn Start Date	Prdn Start Shift	BOM Code	Routing Code	Rev	Prdn Start Qty
☒	09/30/2003	1	09/30/2003	1	1	1		75.0000

Schedule Selection - Summary page

You may want to complete for a specific production schedule because a substitution was made or a data entry error needs to be corrected. In addition, by pegging to a production schedule, you'll update the specific production schedule when you run the Completions Update Process (SFPDCDRV).

Date Range Enter values.

Date Type Indicates how you want to view the production schedules based on:

- *Prdn Start* (production start)
- *Prdn Due* (production due)



Click to refresh the data if you made any changes to Date Range or Date Type.

Sel (selection) Select the specific production schedule that you want to record completions and scrap.

OK Click this button to return to the Production Selection process page.

Adding a New Production Schedule During Completions

If the system indicates that no current outstanding production schedule quantities exist for this production area/item combination as of the BOM/routing effective date or effective date, you'll receive a warning message indicating that "No outstanding Production Qty's exist for Area/Item."

If you click Yes, the system creates a new production schedule. The system checks for any outstanding production schedules by comparing any unprocessed BCTP Detailed Transaction Logs (BCT_DTL's) (completed + scrapped) quantities and netting them against those matching open production schedules (production end quantity > completed + scrapped quantity) in the system.

The default Rate Quantity per Shift from the production area/item definition displays as Production Rate Quantity. Click OK to accept this quantity or change the quantity to the quantity you're currently producing.

Recording Completions and Scrap for Production Schedules That Haven't Been Released

You can also record completions and scrap for production schedules that have not been released.

To release *Entered* production schedules, you'll have to use the Prod Schedule Status Change page or the Production Status Change (SFPARELS) process. This process looks for production schedules that match the date, shift, BOM code, routing code and primary end item of your selection criteria. The system will release all the production schedules with a status of *Entered* that match your selection criteria. You can then record completions and scrap for the production schedules.

Firmed production schedules are automatically released during the completions process.

Defining Completions and Scrap Information for Production Schedules

Access the Record Completions/Scrap page.

The process for recording completions and scrap for production schedules is similar to the process used for production IDs. However, there are a few differences:

- Completions and scrap are recorded at the *last* operation sequence only.
- You'll select one of these Completions Actions:

Completions/Putaway on Save

Use this option to initiate the Completions Update Process (SFPDCDRV) for the selected production schedule upon saving the page. The production end quantity completed and scrapped information is updated as well as the storage area quantity on hand. All completions processing will be performed, including component updates.

Stage Compltns/Putaway on Save

Use this option to run the completions update process at a later time.

Recording Completions and Scrap for Production Schedules with Multiple Outputs

Access the Record Completions/Scrap page.

To record completions and scrap for production schedules with multiple outputs:

1. Enter the Completed Qty (completed quantity) which represents the batch (BOM) production end quantity. This quantity doesn't represent completed quantities for each output in the Output Details area. You can enter a quantity here or optionally enter the quantity of each output. If you enter specific output completions, the system determines the quantity of the batch completed.

2. The Op Seq (operation sequence) is unavailable and the last operation step displays.

Note. Because you're completing a production schedule, the Update Prior Operations check box is unavailable, and the Back Thru Operation field defaults to the first operation step. These fields are display-only and can't be changed.

3. Click the Enter Scrap Data link to make corrections to the scrapped component quantities.
4. Access the Output Details scroll area on the Record Completions/Scrap page.
5. Enter the Completed Qty (completed quantity) for each output. The system calculates the multiple output quantities based on the batch completed quantity from the Record Completions/Scrap page. For example, if you entered a completed quantity of 5 on the Record Completions/Scrap page, the system would calculate each output quantity based on this quantity of 5. However, you can change the completed quantity for any of the outputs on the Output Details scroll area.

Note. If you want to change the production quantities for the batch, which changes the primary and co-product quantities, change the production end quantity for the production schedule on the Production by Area Summary or Production by Area Details pages.

6. (optional) Click Add to add recycle or waste by-products.
 - a. Select the Output Type and Output Item.
 - b. Select the Op Seq (operation sequence) where the additional by-product is being generated.
 - c. Enter the Completed Qty (completed quantity) which is the output quantity that you're currently completing.
 - d. Enter the Output Quantity. This quantity represents the output production end quantity based on per end item or per order.
7. Click Save to record the completions and scrap.

Moving End Items for Production Schedules

With production schedules, you can only complete end items at the last operation. When you enter the completed quantity on the Record Completions/Scrap page, the Route-To PID/Stor Locations (route to production ID and storage locations) scroll area becomes available. You'll use the Route-To-PID/Stor Locations (route to production ID and storage locations) scroll area to route completed end items for production schedules with a single output or multiple outputs.

Editing Component Lists

At some point while recording operation completions and scrap, you may need to view or modify the component list or select the lot and or serial numbers for the consumed components. Using the Edit/Issue Components pages, you can:

- Add components to or delete components from the component list.
- Add substitute components to or delete substitute components from the component list.

- Change the scheduled quantity, quantity per order or per assembly, operation sequence, or component yield percentage.
- Change the pending issue or pending yield loss quantity.
- View or edit components even if you haven't reported any end item completions or scrap.
- Consume components that couldn't be consumed previously due to shortages in the WIP location.
- Select the serial numbers or lot numbers of the components to be consumed.

In addition to using this page to record the consumption of components in the process of recording completions or scrap, you can also use this page to:

- Record miscellaneous consumption of components, independent of backflushing.
- Consume pending component quantities that were created when you backflushed and a shortage existed in the WIP location. If a shortage existed and you already recorded completions, you must first issue material to the WIP location and then use the Edit/Issue Components pages to consume those quantities.

Keep these in mind when editing component lists:

- For regular production, the system displays the components in effect for the end item at the due date for production or for the item revision, if one is specified. If a component for the item is designated as a phantom on the production BOM, the phantom item's components—not the phantom item—is listed here. The operation sequence for the phantom is used for the phantom components.
- For production IDs using serial genealogy, and component's trace usage = serial or lot, the issue qty field is display only. Use the Component Association or the Maintain Serial Genealogy commands to associate and consume these components. To consume trace usage components that are not associated with a serial assembly enter quantity in the pending yield loss qty field.
- For rework production, the end item is the only component listed unless you're using a rework BOM or have previously maintained the component list and added those components necessary to rework the end item.
- For teardown production, the end item to be torn down is the only component listed, unless you have previously added additional components to the component list.
- You can change any component to a different item ID, or you can add a new component or substitute. You can't change the component ID or operation sequence it is associated with once the component has been issued. In addition, for rework production, you can't change the end item that is being reworked and for teardown production, you can't change the end item to be torn down.
- For all production types, when you add new components with an item status of *Discontinue*, you will receive a warning message. For regular production, you will receive a warning message when you add a component with an item status of *Hold*. In both cases, receiving the warning message won't prevent you from performing the action. For rework and teardown, components with an item status of *Hold* will be issued.
- For regular production, you can't add the end item as a component. On the other hand, for rework production, you can't delete the reworked end item from its component list. Duplicate components can exist as long as the operation sequence is unique. You can't add a configured item as a component unless the end item is a configured item.
- When deleting components, the system checks to see if:
 - The issue quantity for the component is greater than zero. In this case, you can't delete the component. To delete the component, reverse the backflush, unconsume the component, or use the Kit Issue/Return page to return the component, and then delete it.

- The component's issue method is *Kit* and a pick plan has been generated for this component.

Note. If you need to add a phantom component to the component list, you must enter all of the items that make up the phantom component. A substitute component can't be a phantom or a component of a phantom. Where substitutes exist for a component, the component can't be changed to a phantom.

Editing or Issuing Components for Production Schedules

You can also use the Edit/Issue process to consume existing pending quantities for a production schedule. After selecting the area/item and dates of the production schedule and clicking the Search button, a message displays if there are any existing pending quantities for production schedules that match your selection criteria. If Yes, then the components with existing pending quantities display.

Workflow Notification

If you have enabled PeopleSoft Workflow, you can use the Replenishment Notification workflow to notify the stockroom when the quantity on hand for components with a component issue method of Production Replenishment falls below its minimum stocking quantity in that location. This notification indicates that the location must be replenished.

Note. When you're editing or issuing components, the system doesn't allow you to modify component information for components whose issue method is *Kit*. Use the Kit Issue/Return Component to edit or issue these components. Additionally, you can view but can't modify components whose source code is *Floor Stock*.

Issuing Components and Effects on Quantities

Action	Results to Quantities
Issuing components to production	Decreases the business unit's on-hand quantity.
Returning components to inventory	Increases the business unit's on-hand quantity.
Issuing material from a nettable, available WIP location	Decreases the business unit's reserved quantity.
Returning components to a nettable, available WIP location	Increases the business unit's reserved quantity.
For owned items, issuing components to production	Decreases the business unit's owned quantity.
Returning owned components to inventory	Increases the business unit's owned quantity.
Issuing components to production	Decreases the storage location's quantity.
Returning components to inventory	Increases the storage location's quantity.

Action	Results to Quantities
Issuing lot-controlled components to production	Decreases the lot quantity on-hand.
Returning lot-controlled components to inventory	Increases the lot quantity on-hand.

Capacity Checking

You activate weight and volume capacity checking on the PeopleSoft Inventory Options page, and define the capacity for each storage location on the Volume/Weight Capacity page accessible from the Material Storage Locations page.

If the item is designated as an Isolate item on the Inventory-Shipping/Handling page in the Define Business Unit Item component, it can only be put away or transferred to empty storage locations or to locations containing stock with the same item ID. The system prevents you from moving an Isolate Item to a WIP location with other items.

If you designate a WIP location as storing only one item on the Volume/Weight Capacity page that is accessible from the Material Storage Locations page, the system only issues material with that item ID to that location. If you don't specify an item ID for a single-item WIP location, the first issue transaction to the empty WIP location defines the only item ID that the location can contain until the item quantity has been fully depleted.

Pages Used to Edit or Issue Components

Page Name	Object Name	Navigation	Usage
Production Selection	SF_ED_COMPS_SELECT	Production Control, Process Production, Issue Materials, Edit/Issue Components, Production Selection	Select the production ID or production schedule for which you want to edit or issue components. Components must have an issue method of Issue or Replenish to use this page.
Edit/Issue Components Summary	SF_EDIT_COMPS_EDIT	- Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Components Summary—if you're editing or issuing components during the completions process - Production Control, Process Production, Issue Materials, Edit/Issue Components, Edit/Issue Components Summary—if you're editing or issuing components after you've recorded completions and scrap	Edit or view components. In addition, use this page to edit or issue components during the Record Completions and Scrap process or after the Record Completions/Scrap process has been run.

Page Name	Object Name	Navigation	Usage
Edit/Issue Express (optional)	SF_EDIT_COMPS_EXPR,	• Production Control, Process Production, Issue Materials, Edit/Issue Components, Edit/Issue Express. Click the Edit/Issue Express link. • Production Control, Process Production, Complete Production, Record Completions/Scrap, Edit/Issue Express. Click the Edit/Issue Express link on the Edit/Issue Components Summary process page.	Select lot- or serial-controlled components that have pending issue or pending loss quantities.
Lot/Serial Number Selection (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Select the lot and/or serial numbers of the lot or serial-controlled components to be consumed during the completions process. You must enter a pending quantity greater than zero for a serial-controlled or lot-controlled component before the Lot/Serial scroll area is available.
Edit/Issue Components Detail	SF_EDIT_COMPS_DET	• Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Components Detail • Production Control, Process Production, Issue Materials, Edit/Issue Components, Edit/Issue Components Summary. Click the Detail button next to the component you want to edit or view.	View detailed information for each component for selected production.
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history for components.
Transaction History Details inquiry	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View completions details based on your selection criteria.

Selecting Production for Editing or Issuing Components

Access the Edit Components - Production Selection page.

Production ID	Enter a value to edit or issue components for a production ID.
Production Area and Item ID	Enter values to edit or issue components for a production schedule.
Revision	Displays if the item entered is revision-controlled. You can change the revision code if you're building to a different revision.
Eff Date (effective date)	The current date displays in this field if the item isn't revision-controlled. The revision or effective date determines the BOM configuration used to create the component list.
BOM/Rtg Effdt (BOM/routing effective date)	Select a value if you have pre-defined specific BOM/routing combinations with the Production Options maintenance pages.
	Click the Select BOM/Routing button next to the BOM/Rtg Effdt field to access the Select BOM/Routing page to select a different BOM/routing combination.
BOM Code and Routing Code	The system displays valid codes for the BOM/routing code combination.
Search	Click the Search button to retrieve the information associated with the production ID or production schedule.

See Also

Chapter 15, "Defining Production Options," page 313

Editing or Issuing Component Summary

Access the Edit/Issue Components Summary page.

Production Selection		Record Completions/Scrap		Edit/Issue Components Summary		Edit/Issue Express			
Process Monitor									
Unit:	US012	☐ Serial in Prdn	Area:	SAUCEFG	Prdn Start Qty:	75.0000	CS		
					Prdn End Qty:	75.0000	CS		
Item ID:	000000000000020036		Prdn Type:	Production	Expected Yield %:	100.0000			
	Creamy Tomato Sauce Bottled, 28 oz.								

Component List		Customize Find View All		First 1-5 of 5 Last					
	*Component ID	Description	Op Seq	Pending Issue Qty	Pending Yield Loss Qty	*Per	Std UOM		
	000000000000020025	Bottle, 28 oz.	10	0.0000	0.0000	Orde	EA	+	-
	000000000000020013	Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream	20	0.0000	0.0000	Orde	GAL	+	-
	000000000000020028	Screwtop	20	0.0000	0.0000	Orde	EA	+	-
	000000000000020029	Label - 28oz Creamy Tomato	30	0.0000	0.0000	Orde	EA	+	-
	000000000000020030	Packing Box	40	0.0000	0.0000	Orde	EA	+	-

Edit/Issue Components Summary page

Print at Save

Select this check box if you want to print production documents for a particular production ID at save time.

Setup Print Options

Click this link to access the Process/Output Options page to select different print criteria for the production documents.



Click the Express Page button to access the Edit/Issue Express page to assign serial and lot numbers.



Click the Detail button to access the Edit/Issue Component Detail page.



Click the Item Search button to access the Item Search, Item Availability, or Item Substitution pages.

Op Seq (operation sequence)

Determines the WIP inventory location to which the components are issued and from which they are consumed. When you add a new component to the component list, the operation sequence defaults to zero. When recording end item completions and scrap, the system consumes a component with an operation sequence of zero at the first operation and decrements the component quantity on hand in the production area's default WIP location.

You can change the operation sequence to any valid operation on the end item's operation list. When you select an operation sequence, the component must be issued to and will be consumed from the WIP location associated with the operations work center.

Per

Indicates whether the quantity required is per Asy (assembly) or per Ord (order). Per assembly indicates the quantity required to complete one end item. Per order indicates the amount required, regardless of the end items that will be produced.

- If the component is per *Asy* (assembly), the system calculates the consumed quantity by multiplying the quantity per by the end item completion and scrapped quantity.
- If the component is per *Ord* (order), and you're recording completions for a production ID, the system consumes the full order quantity during the first recorded backflush. Once consumed, it won't be consumed again during any subsequent backflushes. If you're recording completions for a production schedule, the consumption of a per order quantity depends on the Manufacturing Options setting for *Calc Per Order for Production Schedules*.

Pending Issue Qty (pending issue quantity)

System calculates this value for those components whose operations have had end item completions or scrap reported.

Enter a new pending issue quantity if you consumed more or less than the quantity calculated.

The pending issue quantity is based on the quantity completed plus the quantity scrapped multiplied by the quantity per assembly. If the quantity on the component list is expressed in terms of quantity per order, the full quantity displays. This quantity will be consumed only at the time of the first backflush for production ID. For production schedules, the *Calc Per Order for Production Schedules* option on the Manufacturing Business Unit Option page determines how the quantity is displayed.

If you have enabled PeopleSoft Workflow, the system sends a notice to the production supervisor that there is a non-zero quantity for this component. PeopleSoft Manufacturing uses the Identify Production with Pending Quantities workflow for this notification.

- If the option is set to *Calc Per Order for Prdn Sched*, the system will display the per order quantity for every production schedule completion. If you have already consumed the order quantity for the production run, you must zero out this amount.
- If the option is set to *Don't Calc Per Ord on Prdn Sched*, the system won't display any per order quantity for any production schedule completion. In this instance, you must enter the order quantity when the material is consumed for the production run.

Pending Yield Loss Qty

If the quantity of components lost is more or less than planned, indicate the new pending yield loss quantity here. If the item's yield loss is set to calculate the pending yield loss quantity, then the system calculates the pending yield loss for those components whose operations have had end item completions or scrap reported. You define whether or not you want the system to calculate pending yield loss quantity at the business unit/item level. If you don't want the system to calculate pending yield loss quantity, then you'll manually record the yield loss at the appropriate times.

The system uses this formula to calculate the Pending Yield Loss Quantity:

(Quantity Completed + Quantity Scrapped) x Expected Yield Loss Percentage

Expected Yield Loss Percentage = (1 - Component Yield / 100)

Adding or Substituting Components

Component ID, Op Seq (operation sequence), Per Asy (assembly) or Ord (order), the Pending Issue Qty (pending issue quantity), and any Pending Yield Loss Qty (pending yield loss quantity)	Enter values for these fields if you’re adding or substituting components. Note. Pending issue and pending yield loss quantities aren’t calculated for expensed or floor stock items. In addition, you can’t enter values for components with an issue method of Kit. To change or enter the quantity per, yield or scheduled quantity, use the Edit/Issue Component Detail page. If you’re substituting a component, zero out the pending issue and pending yield loss quantity for the original component.

Allowing Negative On Hand Inventory

If your PeopleSoft Inventory business unit parameter allows negative inventory balances and there isn’t enough material in the WIP location to cover the pending issue or pending yield loss quantity, the quantity on hand in the WIP location will become negative. Another business unit parameter determines when the system issues a warning message prior to driving quantity on hand negative. This message allows you to decide whether to continue with the completion transaction or to wait until the inventory is moved into the WIP location before continuing. If you don’t allow the inventory to go negative, the quantity that couldn’t be consumed remains in the pending issue or pending yield loss fields. These must be reconciled once the WIP location has sufficient quantity on hand.

Note. If the item you’re consuming is serial-controlled, you can’t drive the quantity on hand negative, regardless of the PeopleSoft Inventory business unit setting.

Using the Edit/Issue Express Page

Access the Edit/Issue Express page.

Production Selection		Record Completions/Scrap		Edit/Issue Components Summary		Edit/Issue Express	
Unit:	US012	☐ Serial in Prdn	Area:	SAUCE	Prdn ID:	PRD00223	
Item ID:	000000000000020013		Released	Prdn Type:	Production		
	Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream			Sort Components by:	Op Seq		
Component Details Find View All First 1-2 of 8 Last							
*Component ID:		000000000000020001	Op Seq:	10	Detail		
		Spice Mix					
Pending Issue Qty:		0.0000	Pend Loss:	0.0000			
Lot/Serial Find View All First 1 of 1 Last							
Lot ID:		NONE		Qty Req:			
*Component ID:		000000000000020008	Op Seq:	20	Detail		
		Tomatoes, Chopped, and Mixed					
Pending Issue Qty:		2.0000	Pend Loss:	0.0000			

Edit/Issue Components - Edit/Issue Express process page

Component Details

You can change any of these information on this page:

- Component ID
- Pending Issue Qty (pending issue quantity)
- Op Seq (operation sequence)
- Pend Loss (pending loss)

Consuming Serial-Controlled Components

Access the Lot/Serial Number Selection page.

Sel (select)

Select the serial-numbered components you want to consume by selecting one or more check boxes.

Consuming Lot-Controlled Components

Access the Lot/Serial scroll area on the Edit/Issue Express page.

Lot ID

Select a lot if you're editing or issuing lot-controlled components.

Qty Req (required quantity)

Specify the amount of components you want to consume from each lot.

Editing or Viewing Component Detail

Access the Edit/Issue Components Detail page.

Record Completions/Scrap

Edit/Issue Components Summary

Edit/Issue Express

Edit/Issue Components Detail

Unit: US012

☐ Serial in Prdn

Area: SAUCE

Prdn Start Qty: 100.0000 GAL

Prdn ID: PRD00223

Released

Prdn End Qty: 100.0000 GAL

Item ID: 000000000000020013

Prdn Type: Production

Expected Yield %: 100.0000

Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream

Sort Components by: Op Seq

Component Details

Find | View All

First 1 of 8 Last

*Component ID: 000000000000020001

Source Code: Make

Std UOM: LBS

Spice Mix

Non-Owned: N

Teardown ☐ Substitute ☐

Op Seq: 10

Work Center Detail

Pending Issue Qty: 0.0000

Qty: 0.0030

0.0030000000

Issue Qty: 0.0000

*Per: Asy

Pending Yield Loss Qty: 0.0000

*Yield: 100.0000

Yield Loss Qty: 0.0000

Sched Qty: 0.0000

Issue Method: Issue

Trace Usage: None

Orig Comp ID: 000000000000020001

Spice Mix

Edit/Issue Components Detail process page

Component Details

- Component ID, Op Seq (operation sequence) Qty (quantity), quantity Per, Yield, and Sched Qty (scheduled quantity)

You can change the values for these fields.
- Work Center Detail

Click this link to access work center related information.
- Qty (quantity)

The calculated quantity per is next to this field. The system calculates the quantity per by dividing the quantity per assembly by the bill of material's BOM quantity. You designate the level of precision for the calculated quantity per on the Manufacturing installation options page.
- Pending Issue Qty (pending issue quantity), Pending Yield Loss Qty (pending yield loss quantity)

Although these values default from the Edit/Issue Components Summary page, you can change them here.

Note.

If you aren't completing end items, a pending issue or pending yield loss quantity greater than zero indicates the components couldn't be consumed from the appropriate WIP location from a previous completions or edit components transaction. This is due to a shortage of the component in the WIP location associated with the component's operation sequence.
- Issue Qty (issue quantity)

This field represents the quantity consumed that was issued from the WIP location for the component and was charged to WIP. For items using the Kit issue method, this is the quantity that was issued during Material Release of a production Pick Plan or issued using the

Issue/Return Kit Components page. You can't modify kitted components here. This field is used for production IDs only.

Yield Loss Qty (yield loss quantity)

This field represents the component quantity that was scrapped during end item completion and issued from the WIP location. This field is used for production IDs only.

Issue Method

This field indicates the component replenishment issue method.

Note. Quantities of an item that are stored in a nettable, available WIP location and reserved for production use aren't available for other purposes.

Identifying Material Shortages

An Application Engine process queries the production component table for any outstanding pending component quantities for production with a status of In Process or Pending Complete. If the system finds outstanding quantities, the system issues a worklist notification for each of the qualified production orders to relieve the component. When you work the worklist entry, you're transferred to the Edit/Issue Components Summary page. Once you consume material to relieve the shortages, the worklist entry is marked as completed.

Using the Completions Update COBOL/SQR Process (SFPDCDRV)

The Compl/Scrap Update Process updates completions transactions that are staged by other processes, such as Edit Components updates, production completions, or subcontracted completions recorded through electronic data collection. In addition, you'll run this process to update production quantities for production schedule completions and scrap. You'll run this process if you selected *Stage Compltns/Putaway on Save* as the Completions Action on the Record Completions/Scrap page.

Page Used to Run the Completions Update Process

Page Name	Object Name	Navigation	Usage
Prdn Cmpl/Scrap	BCT_MG_REQCOMP	- Production Control, Process Production, Complete Production, Process Completions and Scrap, Prdn Cmpl/Scrap - Data Exchanges, Process Transactions, Manufacturing, Production Completions/Scrap, Prdn Cmpl/Scrap	Update completions transactions that are staged by other processes and for production schedules.

Running the Completions Update Process

Access the Prdn Cmpl/Scrap page.

Unit and Request ID

Enter values for this process.

Run

Click to run this request. The Process Scheduler runs the Completions/Scrap Update process at user-defined intervals.

Creating Reversing Entries to Correct Data Entry Errors

Use the Record Completions/Scrap component to create reversing entries to correct data entry errors made when recording end item completions or scrap.

Enter a negative number to reverse the completion or scrap entry. For example, suppose an entry was made to record a completion of 8 end items at operation 20, but only 6 end items were actually completed. You can enter a -2 in the Completed Qty (completed quantity) field to reverse the original entry of 8. This will bring the completed quantity balance for that operation to 6.

This reversing entry will:

- Rebalance your completions or scrap count.
- In the case of a production schedule, roll back the reversing entry through all prior operations.
- In the case of a production ID, roll back the reversing entry through the specified prior operation, or back to the previous count point.
- Automatically return any components that were consumed at the current operation to the appropriate WIP location.
- Create a reversing entry for earned labor, machine, and overhead costs.

Pages Used to Create Reversing Entries

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production ID or production schedule to create reversing entries.
Record Completions/Scrap	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap	Enter reversing entries for selected production.
Production Scrap Details	SF_COMPL_SCRAP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap Click the Enter Scrap Data link.	Enter any reversing entries to scrapped quantities, if applicable.
Apply Defaults	SF_COMPL_DEFAULTS	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap Click the Apply Defaults link.	Select the putaway locations for the reversing entries.
Lot/Serial Number Selection (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Select the serial numbers of the serial-controlled components to be returned.
Lot/Serial Number Selection scroll area (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Identify the lots from which you want to return lot-controlled components.

Identifying Production for Data Entry Error Corrections

Access the Record Completions/Scrap - Production Selection page.

Negative Completions Select this option to create reversing entries to correct data entry errors.

Unit and the Production ID Select values to reverse entries for a production ID.

Unit, Production Area and Item

Select values to reverse entries for a production schedule.

BOM/Rtg Effdt

(BOM/routing effective date)

Enter an effective date to determine the particular BOM/routing combination for which you want to complete.

Peg Schedule

Click this link if you want to select a specific production schedule.

Search

Click this button to retrieve the selected production information.

Note. If you attempt to perform negative completions and you haven't recorded any positive completions, the system displays an error message. If you click Yes to continue, you'll be able to record positive completions. If you click No, the system returns you to the Production Selection process page.

If you attempt to perform negative completions and you cannot find the quantity in the location you expected, you may not have run the completions update process and the putaway process.

Entering Negative Completions Quantities

Access the Record Completions/Scrap page.

Production Selection		Record Completions/Scrap		Edit/Issue Components Summary		Edit/Issue Express		D	
Unit:	US012	☐ Serial in Prdn		Prdn Type:	Production	Process Monitor			
Production ID:	PRD00223	In Process		BOM Code:	1				
Production Area:	SAUCE			Routing Code:	1				
Item ID:	000000000000020013			UOM:	GAL	☐ Print at Save			
	Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream								
Prdn Start Qty:	100.0000	Completed Qty:	5.0000	Putaway Action:	Setup Print Options				
Prdn End Qty:	100.0000	Scrapped Qty:	0.0000		Stage for Putaway at Save Time v				
Prdn% Completed:	5.00				Complete Production				
Completed Qty:	-2.0000	Op Seq:	10 Q	Previous Operations ☒ Update Prior Operations 0 Q R					
Scrap Qty:	0.0000	Enter Scrap Data							
Operations Data									
Output Details Find View All First ◀ 1 of 3 ▶ Last									
*Output Type:	Primary	*Output Item:	000000000000020013						
Op Seq:		Creamy Tomato Sauce - Processed - Spice - Tomatoes - Cream							
Completed Qty:		GAL	Output Qty:	100.0000	Per:	Asy	Quality		
Output Schd Qty:	100.0000	Qty Compl To Date:	5.0000	Res %:	100				
Negative Completions - Enter Stor Locations Customize Find View All First ◀ 1 of 1 ▶ Last									
Area	Lev 1	Lev 2	Lev 3	Qty	Return Qty				
Q						+ -			

Record Completions/Scrap page

Completed Qty (completed quantity)	Enter a <i>negative</i> return quantity in this field.
	Note. If you enter in a negative quantity in the <i>Completed Qty</i> (completed quantity) field, and you didn't select the Negative Completion on the Record Completions/Scrap - Production Selection page, you'll receive a message asking if you're doing a negative transaction. If Yes, then the transaction will automatically select the <i>Negative Completions</i> option for you, and you don't have to return to the Production Selection page and select the Negative Completions check box.
Enter Scrap Data	Click this link to correct the scrapped component quantities.
Quality	Click the Quality link to initiate a data entry session and to transfer to either the Data Entry - Subgroup Method page or the Data Entry - Sample Method page in PeopleSoft Quality, depending on the data entry method you specified when creating the Quality Control Plan.
	Note. The Quality link is available for each end item in the Output Details scroll area. You can transfer completions data to PeopleSoft Quality for each end item.
Update Prior Operations and Back Thru Operation	You can enter values for these fields if you're creating a reversing entry for production IDs.
Lot ID	Select a value if you're creating a reversing entry for lot-controlled end items.
Area	Specify the storage area and inventory locations from which you want to pull the completed end items.
Return Qty (return quantity)	Enter a <i>negative</i> number in this field.
Serial IDs	Click this link if you're correcting data entry errors for serial-controlled components. Select each serialized item you want to move back into production by selecting one or more serial IDs.

Note. Reversing entries are processed when you save the Record Completions/Scrap page.

Creating a Reversing Entry for the First Operation, an Intermediate Operation, a Count Point, or for Scrap at Any Operation

If you're creating a reversing entry for the first operation, an intermediate operation, count point, or for scrap at any operation, the system reverses the earned production costs or the scrap costs for those end items at that operation and moves them back to the specified prior operation or count point. In addition, the system returns all consumed components to the WIP location.

Negative Completions When Using Count Points - Example

Count Point Operations: 30, 50

Production Start Quantity: 10

Step 1

Production Start Quantity Completed: 10

Completing at Operation Sequence: 30

Back Thru Operation Sequence: 10

In this example, you're completing operations and scrap for a quantity of 10 at operation sequence 30, which is a production ID count point. You selected the Update Prior Operations check box on the Record Completions/Scrap page, and indicated that you wanted to update previous operations back to operation sequence 10. The system calculates the production completed at operation sequences 10, 20, and 30.

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30 (count point)	10	10	0
40	10	0	0
50 (count point)	0	0	0

Step 2

Production Start Quantity Issued/Returned: -5

Reversing end item completions at Operation Sequence: 3

Update Previous Back Thru Operation Sequence: 10

In this example, you're returning a quantity of 5 at operation sequence 30, which is a count point. You selected the Update Prior Operations check box on the Record Completions/Scrap page, and indicated that you wanted to update previous operations back to operation sequence 10. The system recalculates and reverses the quantity issued to the operation at operation sequence 40.

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	5	5	0
20	5	5	0
30 (count point)	5	5	0

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
40	5	0	0
50 (count point)	0	0	0

Negative Completions When Not Using Count Points - Example

Production Start Quantity: 10

Step 1

Production Start Quantity Completed: 10

Completing at Operation Sequence: 30

Back Thru Operation Sequence: 10

In this example, you're completing operations and scrap for a quantity of 10 at operation sequence 30. You selected the Update Prior Operations check box on the Record Completions/Scrap page, and indicated that you wanted to update previous operations back to operation sequence 10. The system recalculates and reverses the production completed at operation sequences 10, 20, and 30.

Operation Sequence	Quantity Issued	Quantity Completed Through	Quantity Scrapped
10	10	10	0
20	10	10	0
30	10	10	0
40	10	0	0
50	0	0	0

Creating a Reversing Entry at the Last Operation for Completed End Items

If you're creating a reversing entry for the last operation, the system reverses the earned production costs for those end items at the last operation.

To create a reversing entry for the last operation, you must specify the storage area or production area from which you're removing the previously completed end items. You'll also have to complete these:

- For completed end items, select the inventory or WIP location from which you want to remove the items.
- Select which serial- or lot-controlled items that need to be moved back into production, if the completed end items are serial-controlled or assigned to a lot.

Completing Production

For production IDs, use the Complete Production page to indicate that:

- Setup has been completed at the operation even though you aren't recording any end item completions. This enables you to earn the setup costs for the production run. Setup is automatically earned when the first end item completion or scrap is recorded.
- Post production work has been completed at the operation.
- Production for all operations has been completed.

Pages Used to Complete Production

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production ID to record completions and scrap.
Record Completions/Scrap	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap	Enter completions and scrap information for the production ID.
Complete Production	SF_COMPL_PRDN	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap Click the Complete Production link.	Indicate that production at all operation sequences has been completed.

Running the Complete Production Process

Access the Complete Production page.

Update Set Up Costs

Select this check box if you want to indicate that setup work has been completed without recording the completion of any end items.

Update Post Production Costs

Select this check box if the post production work is complete. Post production is not automatically earned even if all end items have been recorded as complete at the operation. By selecting either check box, you earn the setup and post production time, and the labor, machine and overhead value will be included as part of the WIP inventory value.

You can earn setup and post-production costs only once. Also, you can earn setup costs automatically when the first completion is recorded at the operation. You can't earn it with any subsequent operation completions.

To reverse any previously earned setup or post-production costs, select the check boxes again. This creates a reversing entry for any setup or post-production time previously earned.

Production Completed

Select this check box to indicate that all production is complete at all operations and that no additional end item completions or scrap will be recorded. Selecting this option changes the status of the production ID to Pending Complete.

Return

Click to return to the Record Completions/Scrap page.

Save

Click to execute the Complete Production process.

Moving Excess Inventory Back to a Stores Location

When the last end item is completed or the production run is finished, move any excess WIP components with an issue method of issue or replenish back to their appropriate stores location. Once you've identified the excess WIP inventory, run a transfer transaction using PeopleSoft Inventory. The transfer process moves the excess WIP components from the WIP location back to the stores location.

Use Kit Issues/Return to return excess components whose issue method is Kit.

Viewing and Reporting Material Shortages

PeopleSoft Manufacturing provides a shortage report, which allows you to view, at a glance, the shortages for each production order or production run sorted by production ID or components. The system tells you where shortages exist, so you can move inventory to those areas to relieve production shortages.

Pages Used to View and Report Material Shortages

Page Name	Object Name	Navigation	Usage
Review Material Shortage - Selection	SF_MTL_SHORT_SEL	Production Control, Close and Analyze Production, Review Material Shortage, Selection	Select production to view material shortage information.
Shortages	SF_MTL_SHORT_GRD	Production Control, Close and Analyze Production, Review Material Shortage, Shortages	View material shortage information.
Shortage Report Selection	RUN_SFS2001	Production Control, Close and Analyze Production, Shortage Report, Shortage Report Selection	Select production with shortages to generate a shortage report.
Production Selection	RUN_SFS2001B	Production Control, Close and Analyze Production, Shortage Report, Production Selection	Define additional shortage report criteria.

Displaying Scrap and Earned Conversion Cost Information

On a periodic basis, you'll want to monitor scrap and earned conversion costs associated with production. Viewing this information gives you a good idea of how your manufacturing floor is performing. PeopleSoft Manufacturing provides you with the ability to view scrap and earned conversion costs for production IDs and schedules in your production environment.

Pages Used to Display Costing Information

Page Name	Object Name	Navigation	Usage
Review Scrap Costs	SF_SCRAP_INQUIRY	Production Control, Close and Analyze Production, Review Scrap Costs	Select production with scrap costs for a particular production ID or production schedule.
Scrap List by Operation	SF_SCRAP_INQ_OP	Production Control, Close and Analyze Production, Review Scrap Costs, Scrap List by Operation	View scrap information by operation sequence for a specific production ID or production schedule.
Scrap Cost Detail	SF_SCRAP_INQ	Production Control, Close and Analyze Production, Review Scrap Costs, Scrap Cost Detail	View detailed scrap costs for the production ID or schedule broken down by operation sequence.
Production Selection	SF_EARNCON_INQUIRY	Production Control, Close and Analyze Production, Review Earned Conversion Costs, Production Selection	Select a particular production ID or production schedule to view earned conversion costs.
Earned Conversion Cost by Operation	SF_EARNCON_INQ_OP	Production Control, Close and Analyze Production, Review Earned Conversion Costs, Production Selection, Earned Cost by Operation	View conversion cost information by operation sequence for a specific production ID or production schedule.
Earned Conversion Cost Detail	SF_EARNCON_INQ	Production Control, Close and Analyze Production, Review Earned Conversion Costs, Production Selection, Earned Cost Detail	View earned conversion cost detail for production.

Recording and Viewing Actual Machine and Labor Hours

PeopleSoft Manufacturing provides you with the ability to record and view actual labor and machine hours incurred during the manufacturing process.

Pages Used to Record and View Actual Machine and Labor Hours

Page Name	Object Name	Navigation	Usage
Production Selection	SF_ACTHR_SELECTION	Production Control, Process Production, Complete Production, Record Actual Hours, Production Selection	Select production that you want to record actual machine and labor hours incurred during the production process.
Record Actual Hours	SF_ACTHRS_NEW	Production Control, Process Production, Complete Production, Record Actual Hours, Record Actual Hours	Enter labor and machine hours for selected production.
Review Actual Hours - Production Selection	SF_ACTHRS_INQUIRY	Production Control, Close and Analyze Production, Review Actual Hours	Select a specific production ID or production schedule to view actual labor and labor information.
Actual Hours by Operation	SF_ACTHRS_INQ_GRD	Production Control, Close and Analyze Production, Review Actual Hours, Actual Hours by Operation	View actual labor and machine hours for a production ID or schedule by operation.
Actual Hours Detail	SF_ACTHRS_INQ	Production Control, Close and Analyze Production, Review Actual Hours, Actual Hours Detail	View detailed information on actual labor and machine hours for a production ID or schedule by operation.
Crew/Machine Resources Detail	SF_ACTHRS_INQ_SEC	Production Control, Close and Analyze Production, Review Actual Hours, Actual Hours Detail Click the Show Crew/Machine Resources button.	View the resource details for the crew or machine.

Entering Actual Hours Information

Access the Record Actual Hours page.

Production Selection		Record Actual Hours	
Unit:	US008	Production Type:	Production
Production ID:	PRD00223 In Process	Std UOM:	EA
Production Area:	GEARS	Entry Date:	
Item ID:	SR2201 Gear Subassembly		
Work Center:	TEST-SA	Crew:	TEST02
Op Seq:	20	Machine:	TEST02
		Resource	Descr
			# of Resources
			1.00
			1.00
Hours			
Find View All First 1 of 1 Last			
☒ Crew Reporting	Labor Setup:	1.00	Machine Setup: 1.00
☒ Machine Reporting	Labor Run:	0.00	Machine Run: 0.00
	Labor Fixed Run:	0.00	Machine Fixed Run: 0.00
Shift Code: 3	Labor Post	0.00	Machine Post 0.00
	Production:		Production:
	Labor Scheduled	2.00	Machine Scheduled 1.00
	Hours:		Hours:

Record Actual Hours page

Op Seq (operation sequence)
or **Work Center**

Select values for either field. If you select the operation sequence, the Work Center, Crew, and Machine information associated with the operation sequence displays on the page.

You can, however, changes these values.

For production IDs, the operation sequences listed are from the production ID's operation list. The operation sequences for production schedules are the item's routing for the routing code specified for the area/item.

If you select the Work Center, you can select from all available work centers to accommodate any changes that might have occurred on the routing during production. Once you select the work center, the default Crew and Machine information appears based on the work center information. You can accept or change these defaults.

Note. If you then enter an operation sequence, the work center information is changed to the work center associated with the operation sequence, if it is different.

Crew Reporting

If you select this option, the system multiplies the actual labor hours you record by the crew size to determine the total number of actual labor hours for performance reporting.

Machine Reporting

If you select this option, the system multiplies the actual machine hours you record by the number of machines to determine the total number of actual machine hours for performance reporting.

Labor Hours or Machine Hours

Enter the number of hours based on:

- Set Up
- Run
- Fixed Run
- Post Production

Note. Enter negative hours in these fields to correct data entry errors.

Scheduled

Enter any number of scheduled hours when there is known downtime for the work center. Scheduled hours are used to calculate labor and machine utilization. If no scheduled hours are entered, the system calculates the available hours based on either the work center or production calendar.

Note. You can enter actual hours for any labor or machine time type even if the time type wasn't included for planning or costing purposes. For example, if no costing post-production time was specified for the operation, but actual time was spent cleaning up the work center once production was completed, you can still enter those actual hours.

CHAPTER 24

Recording Completions and Scrap Using Electronic Data Collection

This chapter provides an overview of recording completions and scrap using electronic data collection and describe how to:

- Process electronic data collection completions transactions.
- Process other electronic data collection transactions.
- Edit components.
- Record actual machine and labor hours.

Understanding Processing Completions Using Electronic Data Collection

You can record completions and scrap for your production using electronic data collection.

You can access the electronic data collection transaction pages through the Data Exchanges navigation as well as processing them using electronic data collection hardware. When you save an electronic data collection transaction page, the page clears so that you can enter another transaction immediately. The transaction is saved in the transaction log until it is processed by background processes that can be set up to continually scan the transaction log.

The background processes validate all information before any updates are performed. However, when you enter the transactions through the data collection pages, the system verifies the data you have entered in selected fields.

PeopleSoft Manufacturing provides the Production Completions (PRODUCTION_ORDER_COMPLETION) EIP to enable you to import completions and scrap data for your production using electronic data collection.

Note. To correct errors, you must use the online completions pages to enter negative completions and reverse the completions transactions.

Capacity Checking

You activate weight and volume capacity checking on the PeopleSoft Inventory Options page, and define the capacity for each storage location on the Volume/Weight Capacity page which you can access from the Material Storage Locations page.

If the item is designated as an Isolate Item on the Inventory-Shipping/Handling page in the Define Business Unit Item component, you can only put it away or transfer it to empty storage locations or to locations containing stock with the same item ID. The system prevents you from putting away an Isolate Item to a location with other items.

If you designate a storage location as storing only one item on the Volume/Weight Capacity page, the system only puts away material with that item ID in the location. If you don't specify an item ID for a single-item storage location, the first putaway transaction to the empty storage location defines the only item ID that the location can contain until the item quantity has been fully depleted.

Common Elements Used in This Chapter

Completed Qty (completed quantity)	Enter the number of completed end items in this field.
Scrap Qty (scrapped quantity) Scrap Pct (scrapped percentage)	Enter values for these fields.
Reason Code	Enter a value. This field is required if you entered a scrap quantity.
Distrib. Type (distribution type)	Select the account to which you want to charge the scrap. This field is optional.
Lot ID	Select a value if the end item is lot-controlled.
Load Serial Rows	If the end item is serial-controlled or being tracked by serial genealogy (serial in production), enter a Completed Quantity and click this button. The system then creates as many Serial ID fields as the Completed Quantity, and you can enter the Serial IDs for each completed item. The quantity completed and quantity scrapped must be whole numbers for serial-controlled items.

Recording Completions Using Electronic Data Collection

This section discusses how to record completions using electronic data collection.

Pages Used to Record Completions Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Completion/Scrap	BCT_MG_CPL	Data Exchanges, Create Transactions, Manufacturing, Production Completions/Scrap, Completion/Scrap	Record completions and scrap for these transactions: • 0211 Prdn Sched Compl/Scrap Stock • 0212 Prdn ID Compl/Scrap to Stock • 0213 Prdn ID Operation Compl/Scrap
Completion-Multiple	BCT_MG_MCPL	Data Exchanges, Create Transactions, Manufacturing, Multiple Out Completion/Scrap, Completion-Multiple	Record operation completions for production IDs with multiple outputs using electronic data collection: • 0214 - Prdn Sched Multiple Completion • 0215 - PrdnID Multiple Compl to Stock • 0216 - Prdn ID Operation Mult Compl

Recording Completions and Scrap Production with a Single Output

Access the Completion/Scrap page.

Completion/Scrap

Business Unit: US008

Last Transaction Nbr: 3000000000000108000000001

Trans Code: 0211

Prdn Sched Compl/Scrap Stock

Area: FINAL

Item ID: SR2100

Revision: A

Compl Qty: 2.0000

EA

BOM/Rtg Effdt: 10/16/2003

BOM Code: 1

Std UOM: EA

Routing Code: 1

Scrap Qty:

Scrap Pct:

Reason Code:

Distrib. Type:

To Prdn ID:

Op Seq: 0

Container ID:

Storage Loc:

Lot ID: NONE

Load Serial Rows

Serial ID

Find

First

1-2 of 2

Last

Serial ID: 1

Serial ID: 2

Completion/Scrap page (for production schedules)

Note. To correct errors, you must use the online completions pages to enter negative completions and reverse completion transactions.

- Area, Item ID, and BOM/Rtg Effdt (BOM/routing effectivity date)

Enter values for these fields if you’re recording completions for a production schedule using transaction 0211.

Production ID

Select values for this field if you’re recording completions to stock for a production ID using transaction 0212 or intermediate operations completions using transaction 0213.

Item completions aren’t allowed if the end item (including co-products and recycle by-products) or a component of the end item is on Hold.

Completions are allowed for waste products with a Hold status. Completions are also allowed for rework and teardown orders, but any output of teardown with a Hold status prevents teardown completion.
- ## Recording Multiple Output Completions
- Access the Completion-Multiple page.
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Completion-Multiple	
Business Unit: US012	Last Transaction Nbr: 3000000000000108000000001
Trans Code: 0215 PrdnID Multiple Compl to Stock	
Area: SPICE	Production ID: PRD00195
Item ID: 000000000000020001	Spice Mix
Compl Qty: 2.0000	Std UOM: LBS
Op Seq: 0	Scrap Qty:
Back Thru: 0	Reason Code:
	BOM Code: 1
	Routing Code: 1
	Scrap Pct:
	Dist Type:
Output List Find View All First 1 of 1 Last	
Output Item: 000000000000020001	Spice Mix
Output Type: Primary	Std UOM: LBS
Compl Qty Output: 2.0000	Op Seq:
To Prdn ID:	Container ID:
Storage Loc:	Lot ID:
Serial ID Find First 1 of 1 Last	
Serial ID: NONE	Scrapped ☐

Completion-Multiple page (for production IDs)

Note. You can also complete teardown production using Multiple Output Completions transactions, and you can complete teardown outputs at intermediate operations, as well as at the last operation.

Area and Item ID	Select values for these fields if you're recording multiple output completions for a production schedule using transaction 0214.
Production ID	Select a value if you're using transaction 0215 or 0216.
Op Seq (operation sequence)	Enter any intermediate operation if you're using transaction 0216.
Back Thru	Select the operation sequence where you want to record completions.
Scrap Qty (scrap quantity), Reason Code, Scrap Pct (scrap percentage)	Enter values for these fields.
Distribution Type (optional)	Use this field to create specific accounting entries for scrap.
Output Item	Select a value. You can enter Output Items from the outputs designated on the BOM, or you can enter unplanned outputs for recycle or waste by-products. The system includes the amount and type of output items indicated on the end item's BOM. For example, if there were one co-product and two by-products designated on the BOM, there would be four output rows for the co-product, two by-products, and one primary item.

Cmpl Qty Output (completed quantity output)	Enter the number of completed items. Based on the completed quantity of the primary item and the co-products, the system calculates the actual completed quantity.
Load Serial Rows	If the end item is serial-controlled or being tracked using serial genealogy (serial in production), enter a Completed Quantity—this quantity should include any <i>scrap</i> quantity—and then click this button. The system then creates as many Serial ID fields as the completed quantity and any scrap quantity, and you can enter the Serial IDs for each completed item. The quantity completed and quantity scrapped must be whole numbers for serial-controlled items. You must enter either a completed quantity or scrapped quantity, both values can't be zero. If the end item is not being tracked using serial genealogy, enter a completed quantity. The system then creates as many serial IDs for the completed quantity.
Lot ID	Enter a value if the end item is lot-controlled.
Serial ID	Enter the Serial IDs for each completed output. If the item is being tracked using serial genealogy, then upon save, the system automatically associates the serial ID with the production ID.
Scrapped	(optional) Select this check box to indicated that the serial ID is being scrapped.

Note. To correct errors, you must use the online completions pages to enter negative completions and reverse completion transactions.

Processing Electronic Data Collection Completions Transactions

If you're using an electronic data collection system, run the Completions/Scrap Update process to update the system with the completions data collected.

Electronic data collection background processes are set up to continuously scan the transaction log as long as there are transactions in the log with a status of *New* or *Reprocess*. If no transactions with a status of *New* or *Reprocess* are in the log when a process scans the log, the process shuts down. If the process shuts down, you can restart it by using the Process Scheduler. Because the background processes can be automatically restarted by the Process Scheduler at predefined intervals, transaction processing can occur continuously or at set periods throughout the day.

Processing Other Electronic Data Collection Transactions

After you've run the Completions/Scrap process to update the systems with completions data create and generate completions labels.

Pages Used to Create Completion Labels

Page Name	Object Name	Navigation	Usage
Production Selection	RUN_SFS7004	Data Exchanges, Barcode Labels, Completion Label, Production Select	Select the production to create bar coded labels for your end item completions.
Completion Labels,	RUN_SFS7004B	Data Exchanges, Barcode Labels, Completion Label, Completion Labels	Enter the production quantity and number of labels you want to create.

Creating Completions Labels

Access the Production Select page.

Production ID	Select the value if you're creating labels for a production ID.
Production Area, Item ID, and BOM/Rtg Effdt (BOM/routing effectivity date)	Select values for these fields if you're creating labels for a production schedule.
Search	Click to retrieve the selected operational information.

Entering Completion Label Quantities

Access the Completion Labels page.

Override File	Select this check box to designate the file to be overwritten. If you don't select the Override File check box, the system generates a file name in the default directory and attaches the default prefix.
Format ID	Select a value. This field identifies a unique label design defined at the item's SetID level.

Editing or Issuing Components Using Electronic Data Collection

This section discusses editing and issuing components using electronic data collection.

Understanding Editing or Issuing Components Using Electronic Data Collection

You can use an electronic data collection system to issue, return, or substitute components for production IDs.

Note. You can't use an electronic data collection system to issue, return, or substitute components for production schedules.

You can access the electronic data collection transaction pages through the Data Exchanges navigation. When you save an electronic data collection transaction page, the page clears so that you can enter another transaction immediately. The transaction is saved in the transaction log until it is processed by background processes that can be set up to continually scan the transaction log.

The background processes validate all information before any updates are performed. However, when you enter the transactions through the data collection pages, the system verifies the data you have entered in selected fields.

Understanding the Production Order Issue EIP

To support integrated implementations in which a third-party system such as an MES is used to edit or issue components for production IDs, PeopleSoft Manufacturing provides the Production Order Issue EIP, a batch subscribe, inbound asynchronous message that provides PeopleSoft Manufacturing to import edit or issue component information from third-party systems or MES.

You can use the Production Order Issue (PRODUCTION_ORDER_ISSUE) EIP to import edit or issue component information from third-party systems such as an MES. You can use this EIP for production IDs that has a status of Released, In Process, Pending, Pending Complete. This can be done before the manufacturing process begins, any time during the manufacturing process or at completions.

Page Used to Edit or Issue Components Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Component Issues/Returns	BCT_MG_CISS	Data Exchanges, Create Transactions, Manufacturing, Component Issues/Returns	Use this page to perform the electronic issue or return transactions for production IDs. These EIP transactions are used to import edit or issue component information from third-party systems such as an MES. You can perform these transactions: • 2301 - Production Component Issue • 2302 - Production Component Return • 2303 - Production Component Subs (substitutions)

Recording Production Component Issues/Returns

Access the Component Issues/Returns page.

Component Issues/Returns

Business Unit:US008

Last Trans Nbr.:3000000000000108000000001

Trans Code:2301

Production Component Issue

Production ID:MDS_PR1

Production Area:FINAL

BOM Code:2

Routing Code:1

Item ID:SR3001

Diablo 500 Touring Bike

Component ID:SR2100

Brake Subassembly

Op Seq:20

Per:ASY

Quantity:2.0000

Yield Loss Qty:

Std UOM:EA

Lot ID:NONE

Load Serial Rows

Serial IDFindFirst1-2 of 2Last

Serial ID:1

Serial ID:2

Component Issues/Returns page

Component ID

Select the component you’re issuing, returning, or substituting.

Sub Item (substitute item)

If you’re using transaction 2303, select a substitute to replace the original component.

Quantity

Enter a value.

Load Serial Rows

Click this button if end item is serial-controlled or if the end item is being tracked using serial genealogy (serial in production). The system then creates as many rows as the Quantity, and you can enter the Serial IDs for each completed output. The quantity completed and the quantity scrapped must be whole numbers for serial-controlled items.

Quantity, Yield Loss Qty (yield loss quantity), and Per

Enter values for these fields. You must enter values for the quantity and yield loss quantity—both fields can’t be zero.

Recording Actual Machine and Labor Hours

You can use an electronic data collection system to enter labor and machine hours with a breakdown between setup, run, fixed run, and post production times. The system enables you to include single or crew reporting as well as single or multiple machine reporting. There are two transactions to record actual machine and labor hours, one for production IDs and one for production schedules.

You can access the electronic data collection transaction pages through the Data Exchanges navigation. When you save a transaction page, the page clears so that you can enter another transaction immediately. The transaction is saved in the transaction log until it is processed by background processes that can be set up to continually scan the transaction log.

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The background processes validate all information before any updates are performed. However, when you enter the transactions through the data collection pages, selected pieces of information on the page have edits to verify the data that is being entered.

PeopleSoft Manufacturing provides the Actual Hours (PRODUCTION_ACTUAL_HOURS) EIP to import actual hours information captured by a third-party system such as an MES.

If you're using an electronic data collection system, run the Actual Hours Update process (SFPGACTH) to update the system with the completions data collected.

Electronic data collection background processes are set up to continuously scan the transaction log as long as there are transactions in the log with a status of *New* or *Reprocess*. If no transactions with a status of *New* or *Reprocess* are in the log when a process scans the log, the process will shut down. If the process shuts down, it can be restarted by the Process Scheduler. Because the background processes can be automatically restarted by the Process Scheduler at predefined intervals, transaction processing can occur continuously or at set periods throughout the day.

Pages Used to Record Actual Hours

Page Name	Object Name	Navigation	Usage
Actual Hours	BCT_MG_ACT	Data Exchanges, Create Transactions, Manufacturing, Actual Hours	Enter actual hours transactions for production IDs and production schedules. This process uses the Actual Hours EIP.
Actual Hours (process)	BCT_MG_REQACT	Data Exchanges, Process Transactions, Manufacturing, Actual Hours	Run the Actual Hours Update process (SFPGACTH) to update the system with the completions data collected.

Recording Actual Hours

Access the Actual Hours page.

Actual Hours			
Business Unit: US008		Last Trans Nbr.: 3000000000000108000000001	
Trans Code: 0241 Act Hours for Production ID			
Area:	FINAL	Production ID:	HJ_PR002
Item ID:	SR2100	Brake Subassembly	
BOM/Rtg Effdt:		BOM Code:	1
		Routing Code:	1
Entry Date:	10/16/2003	Resource	Descr
Work Center:	BR-ASSY	Crew:	ASSY03
		Machine:	BRAKE01
Op Seq:	10	# of Resources	
☒ Crew Reporting		Labor Hrs	Machine Hrs
☒ Machine Reporting		Setup:	
Shift Code:		Run:	
		Fixed Run:	
		Post Production:	

Actual Hours page (electronic data collection)

Note. You can't enter negative hours using the data collection pages. You must correct data entry errors using negative hours with the online Actual Hours pages.

Production ID	Select a value if you're using transaction code 0241.
Area, Item ID, and BOM/Rtg Effdt (BOM/routing effectivity date)	Select values for these fields if you're using transaction code 0242.
Entry Date, Work Center, Op Seq or (operation sequence)	Enter values for these fields. You must select an operation sequence or a work center. If you select the operation sequence, the Work Center, Crew, and Machine information associated with the operation sequence displays. You can, however, change the values for crews or machines.
# of Resources	The system also displays the number of resources for the crew and machine, and you can update this information.
Work Center	You can optionally select this option rather than the operation sequence. Once you select this field, the Crew and Machine information will be provided based on the work center information.
Crew Reporting	If you select this check box, then all labor hours reported are multiplied by the number of resources associated with that crew to calculate total labor hours.

Machine Reporting	If you select this check box, then all machine hours reported are multiplied by the number of resources associated with that machine to calculate total machine hours.
Labor Hrs or Machine Hrs	Record values for these fields based on: • Setup • Run • Fixed Run • Post Production

Running the Actual Hours Data Collection (COBOL SQL) Process

Access the Actual Hours process page.

Process Frequency	Because the background processes for electronic data collection run continuously and you use the Process Scheduler to re-start the background processes, the Process Frequency should be set to Always.
Unit and Request ID	Enter values.
Run	Click to run this request. Process Scheduler runs the Production Actual Hours (SFPGACTH) process at user-defined intervals.

See Also

[Chapter 23, “Completing Operations and Recording Scrap,” page 521](#)

CHAPTER 25

Subcontracting

This chapter provides an overview of subcontracting and describes how to:

- Select subcontracted operations for purchase order creation.
- Manage purchase order changes.
- Receive end items from the vendor.
- Record completed operations and scrap for subcontracted operations.
- Moving completed end items.
- Completing production for subcontracted operations.
- Editing or issuing components for subcontracted operations.
- Creating reversing entries.
- Recording actual labor and machine hours.

Understanding Subcontracting Using PeopleSoft Manufacturing

In the shop floor environment, you may need to send components or end items to outside vendors for end item processing, rework, inspection, or testing. PeopleSoft Manufacturing enables you to track production progress and outside processing vendor costs associated with subcontracting using production IDs.

Although managing production with subcontracted operations is similar to managing production for in-house production, there are some differences.

- Once production has been released or started, select production IDs with subcontracted operations and send the information to PeopleSoft Purchasing where purchase orders are created.

You'll record operation completions, for both in house and once the end items are received back from your vendor—the subcontracted operations. Once the end items are complete at the final operation, they can be sent to stock or routed to another production area. If the completed end items are lot- or serial-controlled, assign lot and serial numbers.

- Determine how much lead time you'll need to generate and process a purchase order for the subcontracted operation.

If you are using electronic data collection for purchasing receipts, the system automatically generates the subcontracted completions transactions.

Note. You cannot perform a production ID split if you have run the Select Subcontract Prdn for PO process.

Manage Production with Subcontracted Operations

You can use subcontracted operations to manage production.

To manage production with subcontracted operations:

1. Record completed operations and scrap for in-house production for operation sequences prior to the subcontracted operation.

See [Chapter 23, “Completing Operations and Recording Scrap,” Manage Production Using Discrete Orders, page 524.](#)
2. Use the Record Completions/Scrap component to make data entry corrections if required.
3. Use the Subcontracted PO Selection page to generate the file for subcontracted operations to be used by the Create Purchase Orders process (PO_POCREATE).
4. Generate the purchase order for outside processing, approve, and dispatch the purchase order to the vendor.
Use the PO Stage Load, PO Calculation, PO Creation, Approve Amounts, and Dispatch POs pages in PeopleSoft Purchasing to process the subcontracted PO.
5. Send out end items to outside vendors for subcontracted processing.
6. Receive end items back from vendor using the Receiving page in PeopleSoft Purchasing.
See *PeopleSoft Purchasing 8.8 PeopleBook*, “Receiving Shipments,” Processing Receipts.
7. Use the Subcontracted Receipt page to record completed subcontracted operations and scrap for the subcontracted item.
8. (optional) Edit components.
9. Record completions and scrap for any additional in-house operations for the subcontracted end item.
See [Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” page 585.](#)
10. Move completed end items out of production.
11. Run the Completions Update process (SFPDCDRV).
12. Use the Complete Production page to indicate that production for all operations has been completed.
13. (optional) Record actual labor and machine hours associated with the subcontracted operations

Prerequisites

Prior to scheduling a subcontracted operation:

- Identify which tasks and operations are subcontracted.
You can't subcontract operations for configured items.
- (Optional) Specify the vendor that will be performing the operation or task.

- (Optional) Define queue and intransit planning times for subcontracting tasks and operations.
You can also define setup, run, fixed run, and post production planning and costing times. These options permit accurate scheduling and costing of your subcontracted operations.
- Designate components as subcontractor supplied on the BOM components page.
- Define non-owned components and locations.
- Define load defaults within PeopleSoft Purchasing.
- Release material to the shop floor for end items with subcontracted components and operations.
- Create and release productions IDs for end items with subcontracted components and operations.
- Determine how much lead time you'll need to generate and process a purchase order for the subcontracted operation.

Common Elements Used in This Chapter

Production ID	The production order identifier.
Production Area	The production area identifier where the manufacturing process occurs.
Item ID	The name and description of the item being manufactured.
Prdn Type (production type)	The type of production: <i>Production</i> , <i>Rework</i> , or <i>Teardown</i> .
BOM Code	The BOM identifier used during the manufacturing process.
Routing Code	The routing identifier used during the manufacturing process.
Revision	The revision identifier if the item is revision-controlled.

Selecting Subcontracted Operations for Purchase Order Creation

When part or all of your manufacturing process is done at an outside vendor, you need to generate purchase orders for production IDs with subcontracted operations. Use purchase orders to authorize a vendor to add labor and/or material to a partially completed end item.

Using the Select Subcontract Prdn for PO page in PeopleSoft Manufacturing, you'll select one or more production IDs, production areas, or item IDs for which to generate purchase orders for subcontracted operations. When you run the Select Subcontract Prdn for PO (SFS5000) process, the system automatically transfers the subcontracted operations information for purchase order creation to PeopleSoft Purchasing, including production ID information for which the outside processing must be done as well as the operation sequence associated with the outside operation. Once the subcontracted purchase order is generated, it will be processed like any regular purchase order within PeopleSoft Purchasing.

To create purchase orders for subcontracted operations, verify that:

- The production ID is Released or In Process.
- An operation list exists for the production ID. Manually create an operation list if the production ID is for rework, you didn't specify a routing, or you choose not to copy the routing to the production ID.

Completing Operations and Scrap for Production Using Count Points

If you're using count points, then all subcontracted operations must be defined as count point.

Pages Used to Generate Subcontracted Purchase Orders

Page Name	Object Name	Navigation	Usage
Select Subcontract Production	RUN_SFS5000	Production Control, Process Production, Subcontract Prdn for PO, Select Subcontract Production	Select production that requires purchase orders for subcontracted operations.
Subcontracted Purchase Order Report	RUN_SFS2008	Production Control, Process Production, Subcontracted PO Report	View the status of purchase orders you've requested for subcontracted production.

Selecting Production to Generate Purchase Orders

Access the Select Subcontract Production page.

Selection Criteria

Select the options indicating the production to generate purchase orders for subcontracted operations. Select one or more of these options:

- Start Date
- Prdn ID (production ID)
- Prdn Area (production area)
- Item ID

Run

Click to run this request. Process Scheduler runs the Select Subcontract PO for Prdn (SFS5000) process at user-defined intervals.

Extract to PO only when prior Op Seq is complete

Select this check box to ensure that the subcontract PO will be created only after the prior operations are complete thereby eliminating change orders.

Generating, Approving, and Dispatching Purchase Orders for Subcontracted Operations

Once you run the Select Subcontract Prdn for PO process, the purchase orders for the subcontracted services can be generated.

To generate, approve, and dispatch the subcontracted purchase order:

1. Run the PO Stage Load (PO_POSTAGE) process.

This process is run with the PO Stage Load page in the Purchase Orders, Build/Source POs navigation, takes all the requests generated from requisitions, PeopleSoft Supply Planning, and PeopleSoft Manufacturing and stages them for the actual purchase order creation.

2. Run the PO Calculations (PO_POCALC) process.

This process is an Application Engine process that does most of the processing to create a purchase order. Use the PO Calculations navigation to run this process.

3. Run the Create Purchase Orders (PO_POCREATE) process.

This process is an Application Engine process that generates the purchase orders that will be staged for approval and dispatching. Use the PO Creation navigation to create purchase orders for the subcontracted service.

If a recommended vendor was listed on the subcontracted task or operation, the purchase order is created with the vendor specified. If the vendor field was left blank on the routing or operation list for the production ID, the suggested vendor, as defined in PeopleSoft Purchasing, is selected.

The system-generated purchase order for the subcontracted service contains this data:

- Business unit and production ID associated with the production.
- Task description if a task code is associated with the subcontracted operation. Otherwise, the end item description is used, along with the prefix of *SERVICE*.
- Quantity and unit of measure.
- Operation sequence associated with the subcontracted operation.
- Purchase order due date based on the due date of the subcontracted operation.
- Purchase order unit price based on the cost defined for the subcontracted operation.

4. Once you've created your purchase orders, you must approve and dispatch them before you can send the purchase order to the vendor.

Use the Amount Approval and Dispatch Purchase Orders pages to approve and dispatch the purchase orders for the subcontracted operations.

See Also

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2008 - Subcontracted Purchase Order Report, page 675

Managing Purchase Order Changes

There are times when you'll need to change the purchase order to respond to production changes. If a purchase order for subcontracting production has been created and a production change requires a change to the purchase order, PeopleSoft Manufacturing sends a purchase order change request to PeopleSoft Purchasing. This request indicates a purchase order change is required for the subcontracted purchase and either a purchase order change request is processed or a new purchase order needs to be generated.

You'll also need to change the purchase order when any end items have been returned from the vendor as scrap.

A purchase order change may be necessary when there is a change to:

- The production quantity. A quantity change can result from production maintenance as well as from scrapping end items when you're recording completions.

- The actual start date and time or actual due date and time for the production IDs or subcontracted operation.

The purchase order change request will be processed by PeopleSoft Purchasing using the Change Order Request page.

After you request a purchase order and run the PO Stage load process, the subcontracted operation has an In Process status, after PeopleSoft Purchasing has received and acknowledged the subcontracted operation information.

If you use the background reschedule process to reschedule production with subcontracted operations, and the purchase order date is no longer valid, the system cannot reschedule an In Process purchase order. When running the background reschedule process, you can request that the system check for any production that has an In Process purchase order for subcontracted operations. In this case, the system displays an error message for each instance, unless you decide to skip further in process messages. You can then contact your purchasing department to reschedule the purchase order.

Canceling or Deleting a Subcontracted Purchase Order

If you cancel or delete the subcontracted PO, line, or schedule, the system resets the subcontracted PO status for the associated production ID or operation sequences associated with the PO, line or schedule. Therefore, you'll need to rerun the process to generate a subcontracted PO.

Receiving End Items from the Vendor

Receiving end items back from the vendor is a two-step process:

1. Receiving records the receipt of the end items back from the vendor.
2. Production records the operations completions and scrap for the received end items.

Once the vendor has completed the subcontracted work, the end items are returned to Receiving. To receive end items back from your subcontractor, use the Receive with Purchase Order page.

During the receiving process, the end items can be inspected and accepted or rejected from the vendor. Receiving assigns one of these indicators to the rejected quantity when recording the receipt:

Destroy	Scrap the end items received. If the reject action is Destroy, then that quantity appears as scrap on the Production Subcontract Receiving pages. The received quantity appears as Recv Rejected Qty (received rejected quantity). Any end items to be destroyed must be scrapped in production.
Return for Replacement	Return the end item to the vendor with the expectation that it will be replaced. The Return Qty (return quantity) is equal to the Reject Qty (reject quantity) with a reject action of <i>Return to Replacement</i>. The Recv Received Qty (received rejected quantity) at the production is the received quantity and the received rejected quantity is zero. PeopleSoft Purchasing will not record the replacement quantity as either accepted or rejected.

Return for Credit

Return the end items back to the vendor for a credit. The credited amount is the subcontracted service charge. If the reject action is *Return for Credit*, it creates an RTV (return to vendor) record when you save the page.

The Return Qty (return quantity) is equal to the Reject Qty (reject quantity) with a reject action of *Return for Credit*. The RTV updates the return quantity on the receiver record. The action also updates the purchase order, and subtracts the quantity returned.

PeopleSoft Purchasing will record the return to vendor quantity as scrap

The table summarizes the receiving reject actions and its effects.

Action	Receiving Record	PS_RECV_SUBREC_ MG	PO Line
Return for Replacement	No reject qty	No scrap	No update
Return for Credit	Scrap the qty	Scrap the qty	Update

Subcontracted receipts to stock are prevented if the end item or a component of the end item is On Hold and the order is for regular production. Subcontracted receipts to intermediate operations are allowed for regular production.

The PeopleSoft Purchasing receipt process updates production to indicate that the end items have been received. You cannot record operation completions or scrap until the end items have been received.

In addition, you cannot close production until the quantity of end items sent to the vendor is equal to the quantity of scrapped and completed end items received back from the vendor and recorded complete in production.

PeopleSoft Purchasing can optionally receive end items using electronic data collection. Electronic data collection transactions for subcontracted end items automatically record the subcontracted completions data. You don't need to record completions in the Subcontracted Receipt pages for these subcontracted end items. After the transactions are recorded and staged, run the Completions/Scrap Update process to update the production balances.

Recording Completed Operations and Scrap for Subcontracted Operations

Once you've processed the end items through receiving and inspection, you can record the operation as complete in PeopleSoft Manufacturing. If the subcontracted operation is the last operation on the routing, you can also indicate that production is completed.

When you record scrap for the end item, the system optionally sends a workflow notification to selected roles defined by you. These roles could include a quality manager or a production control manager.

If you are integrating to a Manufacturing Execution System, you can receive subcontracted operation completions from the MES to PeopleSoft. The end items need to be received in PeopleSoft Purchasing before you can record the completion transaction in PeopleSoft Manufacturing. The MES sends the same information for a subcontracted completion as with completions for regular operations.

See Also

Chapter 23, “Completing Operations and Recording Scrap,” Integrating PeopleSoft Manufacturing to a Third-Party System, page 526

PeopleSoft Supply Chain Management Integration 8.8 PeopleBook, “Managing PeopleSoft Supply Chain Management Integration Points,” Using Transaction Maintenance

Pages Used to Record Completions and Scrap for Subcontracted Operations

Page Name	Object Name	Navigation	Usage
Subcontracted Receipt	SF_SUBREC	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Subcontracted Receipt	Record completed operations and scrap by subcontracted operation. Note. You must receive the subcontracted end items through PeopleSoft Purchasing before using this page.
Complete Production	SF_COMPL_PRDN	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Subcontracted Receipt Click the Complete Production link.	Indicate that production is completed for production IDs with subcontracted operations.
Receipt Information	SF_RECEIPT_INFO	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Subcontracted Receipt, Receipt Information	View receipt and completions information about the subcontracted operation.
Record Completions/Scrap (optional)	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions/Scrap	Enter completions and scrap information for production IDs. In addition, use this page to move end items for production IDs with a single output or multiple outputs.

Page Name	Object Name	Navigation	Usage
Production Scrap Details	SF_COMPL_SCRAP	Production Control, Process Production, Complete Production, Record Completions/Scrap Click the Enter Scrap Data link.	Enter scrap quantities, if applicable.
Apply Defaults	SF_COMPL_DEFAULTS	Production Control, Process Production, Complete Production, Record Completions/Scrap Click the Apply Defaults link.	Select the default putaway or alternate storage locations for the completed end items.
Rapid Serial Numbers (optional)	AUTO_SERIAL_WRK	Production Control, Process Production, Complete Production, Record Completions/Scrap Click the Generate Serial IDs link.	Automatically generate serial numbers for production end items that are serial-controlled. Note. You must define serial-controlled items in PeopleSoft Inventory.
Lot/Serial Number Selection scroll area (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions/Scrap, Edit/Issue Express Click the Select Lot/Serial link.	Identify the lots from which you want to consume lot-controlled components. You must enter a pending quantity greater than 0 for a lot-controlled component before the Lot/Serial scroll area is available.
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history for production IDs.
Production History - Detail inquiry	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Detail button on the Production History page.	View production transaction history details based on: • Completions Detail • Component Consumption • Operation Detail

Recording Completed Subcontracted Operations and Scrapped End Items

Access the Subcontracted Receipt page.

Subcontracted Receipt		Edit/Issue Components Summary		Edit/Issue Components Detail		Edit/Issue Express																																																					
Unit:	US008	☐ Serial in Prdn		Prdn Type:	Production	Process Monitor																																																					
Production ID:	PRD00083	In Process		BOM Code:	1																																																						
Production Area:	FINAL			Routing Code:	1																																																						
Item ID:	MT3000			UOM:	EA	☐ Print at Save																																																					
	Mountain Bike, Womans			Revision:		Setup Print Options																																																					
Prdn Start Qty:	100.0000	Completed Qty:	100.0000	Putaway Action:	Complete Production Receipt Information																																																						
Prdn End Qty:	200.0000	Scrapped Qty:	0.0000																																																								
Prdn% Completed:	100.00																																																										
Completed Qty:	100.0000	Op Seq:	40	Previous Operations ☒ Update Prior Operations Back Thru Operation: 0																																																							
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Operations Data Customize Find View All First 1-3 of 5 Last <table border="1"> <thead> <tr> <th>Op Seq</th> <th>Work Center</th> <th>Task Code</th> <th>Count Point</th> <th>Assy Starts Qty</th> <th>Quantity Issued to Operation</th> <th>Qty Cpl/Th</th> <th>Assembly Qty Scrapped at Op</th> <th>Expctd Cmpl Qty</th> <th>Op Yld %</th> <th>Setup Earned</th> <th>Post Prod</th> <th>Sub Op</th> </tr> </thead> <tbody> <tr> <td>10</td> <td>FL-ASSY</td> <td>FORK</td> <td>N</td> <td>100.0000</td> <td>200.0000</td> <td>200.0000</td> <td>0.0000</td> <td>200.0000</td> <td>100.0000</td> <td>Y</td> <td>N</td> <td>N</td> </tr> <tr> <td>20</td> <td>FL-ASSY</td> <td>FINAL</td> <td>N</td> <td>200.0000</td> <td>200.0000</td> <td>200.0000</td> <td>0.0000</td> <td>200.0000</td> <td>100.0000</td> <td>Y</td> <td>N</td> <td>N</td> </tr> <tr> <td>30</td> <td>INSP</td> <td>INSP</td> <td>N</td> <td>200.0000</td> <td>200.0000</td> <td>200.0000</td> <td>0.0000</td> <td>200.0000</td> <td>100.0000</td> <td>Y</td> <td>N</td> <td>N</td> </tr> </tbody> </table>								Op Seq	Work Center	Task Code	Count Point	Assy Starts Qty	Quantity Issued to Operation	Qty Cpl/Th	Assembly Qty Scrapped at Op	Expctd Cmpl Qty	Op Yld %	Setup Earned	Post Prod	Sub Op	10	FL-ASSY	FORK	N	100.0000	200.0000	200.0000	0.0000	200.0000	100.0000	Y	N	N	20	FL-ASSY	FINAL	N	200.0000	200.0000	200.0000	0.0000	200.0000	100.0000	Y	N	N	30	INSP	INSP	N	200.0000	200.0000	200.0000	0.0000	200.0000	100.0000	Y	N	N
Op Seq	Work Center	Task Code	Count Point	Assy Starts Qty	Quantity Issued to Operation	Qty Cpl/Th	Assembly Qty Scrapped at Op	Expctd Cmpl Qty	Op Yld %	Setup Earned	Post Prod	Sub Op																																															
10	FL-ASSY	FORK	N	100.0000	200.0000	200.0000	0.0000	200.0000	100.0000	Y	N	N																																															
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30	INSP	INSP	N	200.0000	200.0000	200.0000	0.0000	200.0000	100.0000	Y	N	N																																															

Subcontracted Receipt page

Print at Save

Select this check box if you want to print production documents at save time.

Setup Print Options

Click this link to access the Process/Output Options page to select different print criteria for the production documents.

Completed Qty (completed quantity)

Enter the number of end items being completed.

Quality

Click the Quality link to initiate a data entry session and to transfer to either the Data Entry - Subgroup Method page or the Data Entry - Sample Method page in PeopleSoft Quality, depending on the data entry method you specified when creating the Quality Control Plan.

Operations Data

View display-only production data such as assembly start quantities, number of assemblies scrapped, expected completed quantities and yield percentages for each operation sequence.

See Also*PeopleSoft Quality 8.8 PeopleBook, "Collecting Quality Data"***Reviewing Subcontract Receipt Information**

Access the Receipt Information page.

Recv Rejected Qty (received rejected quantity)

The quantity that Receiving rejected from the vendor and was recorded in PeopleSoft Purchasing. Receiving assigns one of these indicators to the rejected quantity:

- *Destroy*
- *Return for Replacement*

- *Return for Credit*

Only received quantities that have a status of *Destroy* or *Return for Credit* appear in the Recv Rejected Qty (received rejected quantity) field.

Prdn Accepted Qty
(production accepted quantity)

The quantity that was actually recorded as a completion using the Subcontract Receipt page.

Prdn Rejected Qty
(production rejected quantity)

The quantity that was actually recorded as scrap using the Subcontract Receipt page.

Note. Use the Edit Components page if you want to modify or view the components that will be consumed based on the quantity completed or scrapped, or if you need to select the serial or lot numbers for those serial- or lot-controlled components that were consumed when you recorded your completion.

Moving Completed End Items

The process for moving completed end items for subcontracted operations is the same as for other production.

See Chapter 23, “Completing Operations and Recording Scrap,” Moving Completed End Items and Assigning Serial and Lot Numbers , page 543.

Pages Used to Move End Items for Completed Production

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions/Scrap, Production Selection	Select a production ID or production schedule.
Record Completions/Scrap page - Route-To PID/Stor Locations (route to production ID and storage locations) scroll area	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions/Scrap, Production Selection, Record Completions/Scrap Enter a Completed Qty (completed quantity) and the last Op Seq (operation sequence) to access the Route-To/PID Stor Locations (route to production ID and storage locations) scroll area.	Move completed end items to a production ID or to a storage location.
Shortages	SF_COMPL_SHORTAGE	Production Control, Process Production, Complete Production, Record Completions/Scrap, Production Selection, Record Completions/Scrap Enter a Completed Qty (completed quantity) and the last Op Seq (operation sequence) to access the Route-To/PID Stor Locations (route to production ID and storage locations) scroll area. Click the Shortages button in the Route to PID/Storage Locations scroll area.	Select a production ID to which you want to route the completed end item.

Completing Production for Subcontracted Operations

The process for completing production for subcontracted operations is similar as for other production.

See [Chapter 23, “Completing Operations and Recording Scrap,” Using the Completions Update COBOL/SQR Process \(SFPDCDRV\), page 570.](#)

Pages Used to Complete Production for Subcontracted

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production ID to record completions and scrap.
Record Completions/Scrap	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap	Enter completions and scrap information for the production ID.
Complete Production	SF_COMPL_PRDN	Production Control, Process Production, Complete Production, Record Completions and Scrap Click the Complete Production link.	Indicate that production at all operation sequences has been completed.

Editing or Issuing Components for Subcontracted Operations

The process for editing or issuing components for subcontracted operations is similar to that of other production.

See [Chapter 23, “Completing Operations and Recording Scrap,” Editing Component Lists, page 559](#).

Pages Used to Edit or Issue Components for Subcontracted Operations

Page Name	Object Name	Navigation	Usage
Edit/Issue Components Summary	SF_EDIT_COMPS_EDIT	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Edit/Issue Components Summary	Edit or view components.
Edit/Issue Express (optional)	SF_EDIT_COMPS_EXPR	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Edit/Issue Express	Select lot- or serial-controlled components that have pending issue or pending loss quantities.

Page Name	Object Name	Navigation	Usage
Lot/Serial Number Selection (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Edit/Issue Express Click the Select Lot/Serial link.	Select the lot and/or serial numbers of the lot or serial-controlled components to be consumed during the completions process. You must enter a pending quantity greater than 0 for a serial-controlled or lot-controlled component before the Lot/Serial scroll area is available.
Edit/Issue Components Detail	SF_EDIT_COMPS_DET	- Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Edit/Issue Components Detail - Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Edit/Issue Components Summary Click the Detail button next to the component you want to edit or view.	View detailed information for each component for selected production.
Record Completions/Scrap - Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions/Scrap, Production Selection	Return components issued during completions or to correct data entry errors. You can also return lot- or serial-controlled end items by using this page. Record completions for a production ID or a production schedule. To return lot- or serial-controlled end items, first record operations and scrap and put away production with lot- and serial-controlled components.
Record Completions/Scrap	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions/Scrap	Return components issued during completions, or to correct data entry errors. You can also return lot- or serial-controlled end items by using this page.

Page Name	Object Name	Navigation	Usage
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history for components.
Transaction History Details inquiry	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Detail button.	View completions details based on your selection criteria.

Creating Reversing Entries

If a data entry error is made when recording end item completions or scrap for a subcontracted operation, input a negative number to reverse the completion or scrap entry. For example, an entry was made to record a completion of 8 end items at operation 20, but only 6 end items were actually completed. Enter a -2 in the Completed Qty field to reverse the original entry of 8. This brings the completed quantity balance for that operation to 6.

This reversing entry will:

- Rebalance your completions or scrap count.
- Rollback the reversing entry only through the subcontracted operation.
- Automatically return any components that were consumed at the current operation to the appropriate WIP location.
- Create a reversing entry for earned labor, machine, and overhead costs.

Creating a Reversing Entry for Subcontracted Operations Using Count Points

If you are performing reversing entries for production IDs with subcontracted operations, you can reverse operations and scrap from one count point (or subcontracted operation) to the prior count point (or subcontracted operation).

See Also

Chapter 23, “Completing Operations and Recording Scrap,” Moving Completed End Items and Assigning Serial and Lot Numbers , page 543

Pages Used to Create Reversing Entries for Subcontracted Operations

Page Name	Object Name	Navigation	Usage
Production Selection	SF_COMPL_SELECTION	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection	Select a production ID to create reversing entries.
Record Completions/Scrap	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection, Record Completions and Scrap	Enter reversing entries for selected production.
Production Scrap Details	SF_COMPL_SCRAP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection, Record Completions and Scrap Click the Enter Scrap Data link.	Enter any reversing entries to scrapped quantities, if applicable.
Apply Defaults	SF_COMPL_DEFAULTS	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection, Record Completions and Scrap Click the Apply Defaults link.	Select the putaway locations for the reversing entries.
Lot/Serial Number Selection (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection, Edit/Issue Express Click the Select Lot/Serial link.	Select the serial numbers of the serial-controlled components to be returned.
Lot/Serial Number Selection scroll area (optional)	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Production Selection, Edit/Issue Express Click the Select Lot/Serial link.	Identify the lots from which you want to return lot-controlled components.

Recording Actual Labor and Machine Hours

The process for recording actual labor and machine hours for subcontracted production is similar to that of other production.

See [Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” Recording Actual Machine and Labor Hours, page 593.](#)

Pages Used to Record and View Actual Machine and Labor Hours

Page Name	Object Name	Navigation	Usage
Production Selection	SF_ACTHR_SELECTION	Production Control, Process Production, Complete Production, Record Actual Hours, Production Selection	Select production that you want to record actual machine and labor hours incurred during the production process.
Record Actual Hours	SF_ACTHRS_NEW	Production Control, Process Production, Complete Production, Production Selection, Record Actual Hours	Enter labor and machine hours for selected production.
Review Actual Hours - Production Selection	SF_ACTHRS_INQUIRY	Production Control, Close and Analyze Production, Review Actual Hours	Select a specific production ID or production schedule to view actual labor and labor information.
Actual Hours by Operation	SF_ACTHRS_INQ_GRD	Production Control, Close and Analyze Production, Review Actual Hours, Actual Hours by Operation	View actual labor and machine hours for a production ID or schedule by operation.
Actual Hours Detail	SF_ACTHRS_INQ	Production Control, Close and Analyze Production, Review Actual Hours, Actual Hours Detail	View detailed information on actual labor and machine hours for a production ID or schedule by operation.
Crew/Machine Resources Detail	SF_ACTHRS_INQ_SEC	Production Control, Close and Analyze Production, Review Actual Hours, Actual Hours Detail Click the Show Crew/Machine Resources button.	View the resource details for the crew or machine.

CHAPTER 26

Closing Production

This chapter provides an overview of the production close process and describe how to:

- Analyze potential variances.
- Initiate the Close Production (SFS1100) process.
- Reopen production.

Understanding the Production Close Process

Once you've completed production, you'll want to close production and calculate variances for postings to the general ledger. You'll also want to analyze production costs and variances. The first step in the close process is to close production to any further material or labor transactions. During the close process, you may find that you need to reopen production to correct data entry errors, or reopen production that was closed prematurely.

With PeopleSoft Manufacturing, you can generate a Potential Production Variance Report. This report lists the variances based on the current snapshot of production. In addition, the system can send the report to the appropriate individuals by using the Potential Prdn Variance Report workflow to notify them of the potential variances. When this report is run, no accounting close occurs and there are no variances posted.

Periodically, you can review this report to highlight the variances right away so you can correct potential production problems.

Note. Production must have a status of *In Process* or higher to generate variance reports.

See Also

[Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 649](#)

Analyzing Potential Variances

After completing production, use the Potential Production Variance Report to view potential variances that exist in production.

Pages Used to Generate a Potential Variance Report

Page Name	Object Name	Navigation	Usage
Production Selection	RUN_SFS1600	Production Control, Close and Analyze Production, Potential Prdn Variance Rpts, Production Selection	Use the Potential Production Variance Report to view potential variances that exist in production prior to closing for accounting the production IDs and schedules.
Potential Variance Selection	RUN_SFS1600A	Production Control, Close and Analyze Production, Potential Prdn Variance Rpts, Potential Variance Selection	Select report criteria.

See Also

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS1100 - Production Close Report, page 666

Initiating the Production Close Process

Once you complete production for the day or for a production ID, you'll need to close production to any further material or labor transactions. The production status is changed to Closed for Accounting once all related transactions have been completed and potential variances have been analyzed. When the final close for production (the accounting close) does occur, PeopleSoft Manufacturing calculates variances and records them for later posting to the general ledger.

If you have enabled PeopleSoft Workflow, you can use the Production Ready to Close workflow that scans the production data files and notifies appropriate users of any production status that has changed to Pending Complete, Completed, or Closed for Labor.

If you are using production IDs, you can identify costs and variances by discrete order. If you're using production schedules, the system collects costs and variances by day and shift for the production area and item combination.

PeopleSoft Manufacturing provides three options to close a production ID or production schedule:

Complete	This first close prevents any material movement for the production ID or for production on the day/shift selected. This includes component consumption as well as any assembly completions at an operation, to stock, or to another production ID or production area.
Closed for Labor	This second close prevents any additional actual labor or machine time recording.
Closed for Accounting	This final close completes the production cycle and closes the production ID or production for the shift for accounting purposes.

Once closed for accounting purposes, PeopleSoft Manufacturing calculates these variances:

- Configuration Yield Loss

- Material Usage
- Component Yield
- Lot Size - for material, labor, and machine
- Routing Process
- Rework
- Teardown
- Outside Processing Variance
- Mix Variance
- Operation Yield Variance

In process production schedules are automatically set to Pending Complete when the order quantity equals the quantity completed. The system combines material lot size and configuration variances for production schedules.

Note. PeopleSoft Manufacturing reports—but does not post—Efficiency and Utilization variances.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, “Analyzing Manufacturing”

Appendix A, “Delivered Workflows for PeopleSoft Manufacturing,” page 649

Pages Used to Run the Production Close Process

Page Name	Object Name	Navigation	Usage
Production Selection	RUN_SFS1100	Production Control, Close and Analyze Production, Close Production	Change the Production Status to Complete, Clsd/Labor (closed for labor) or Clsd/Acctg (closed for accounting).
Close Status Selection	RUN_SFS1100A	Production Control, Close and Analyze Production, Close Production, Close Status Selection	Define the production close criteria.

Selecting Production Close Options

Access the Production Selection page.

Report Only Mode

You can run this process to view the production that may be closed as well as the variances that could be generated as a result of an accounting close.

Select Production IDs

Select this check box to close production IDs based on any of these:

- Prdn ID (production ID)
- Prdn Area (production area)
- Item ID

All or a Range

Narrow down the production to close by combining any of these options. For example, you can close only those production IDs within a selected production area for a single item.

Select Production Schedules

Select this check box to close production schedules based on:

- Prdn Area (production area)
- Item ID

Defining Closing Production Criteria

Access the Close Status Selection page.

Close Production **Close Status Selection**

Run Control ID: ADHOC Report Manager Process Monitor Run

Language: English

Report Request Parameters

Unit: US008

Current Status: ☒ In Process ☐ Complete ☐ Clsd/Labor ☐ Clsd/Acctg

Close Production For: ☐ Complete ☐ Clsd/Labor ☐ Clsd/Acctg

Curr Prdn Due/Close Dates: 11/19/2003 to 11/30/2003

☒ Pend/Cmpl ☐ Complete ☐ Clsd/Labor ☐ Clsd/Acctg 11/19/2003 to 11/30/2003

☒ Complete ☐ Clsd/Labor ☐ Clsd/Acctg 11/19/2003 to 11/30/2003

☐ Clsd/Labor ☒ Clsd/Acctg to

☒ Close with Component Shortages Variance Distrib Type:

☒ Close with Assemblies Remain Tolerance %: 0.00000000

Close Status Selection page

Current Status

Select one or more of these production statuses:

- In Process
- Pend Cmpl (pending complete)
- Complete
- Clsd/Labor (closed for labor)

Close Production For

Select the new production status. Values are:

- Complete
- Clsd/Labor (closed for labor)
- Clsd/Acctg (closed for accounting)

Curr Prdn Due/Close Dates (current production due/close dates)	Enter the appropriate date ranges. If you're closing any In Process or Pending Complete production, the system closes any production IDs or production schedule quantities whose production due date falls within the date range specified. If you are closing any production IDs or production schedule quantities whose current status is Complete or Closed for Labor, the system closes any production whose close date falls within the range specified.
Complete with Component Shortages	Select this check box if you want to close production even if you haven't issued all the scheduled material for the production ID or production schedule. In this instance, the quantity issued to production is less than the current scheduled quantity for the component.
Variance Distrib Type (variance distribution type) (optional)	Can be used in conjunction with the Transaction Group for variances to define the accounting entries to post the variance to the general ledger. The default distribution type for the transaction group (if one was defined) displays, but you can override the distribution type for each accounting close. This field is used only when closing production for accounting.
Close with Assemblies Remain (close with assemblies remaining)	Select this check box if you want to close production even though the full production quantity hasn't been completed. Production can close with remaining assemblies only if the production quantity has not been started. Once any quantity is in process, you must complete the assemblies in order for production to close.
Tolerance %	You must indicate a tolerance percentage if you selected the Close with Assemblies Remain check box. Use this field to define what percentage of assemblies can remain uncompleted and still close production with remaining assemblies. For example, if you have a production ID with an order quantity of 100 but have completed only 92 units and enter a tolerance percentage of 5%, this production ID won't close because the quantity remaining to be completed is 8% of the order quantity. The default is 0%. The system closes any production In Process, Pending Complete, Complete, or Closed for Labor if the quantity of assemblies completed and scrapped at each operation equals the quantity started at each operation.
Run	Click to run this request. Process Scheduler runs the Close Production (SFS1100) process at user-defined intervals.

Note. If any of the production IDs are for production with one or more subcontracted operations, the system cannot close production if subcontracted purchase order have not been fully received. To close those production IDs, the material must be received and the subcontracted operation must be recorded as complete.

Using the Close Production Request Report

This process generates the Close Production Request report. If you can't close a production ID or a production schedule quantity that falls within the selection criteria, the production ID, area, item, and day shift information displays as well as the reason why the production could not be closed. Possible reasons include:

- Outstanding pick plans.

In this instance, a pick plan has been generated for a production ID or production schedule, but not yet confirmed and released. The picking process must be completed before production can be closed.

- Outstanding consumed quantity.

In this instance, a component was consumed during a backflush but there wasn't sufficient quantity on hand in the WIP storage area (and the inventory business unit does not allow inventory to go negative) to issue the component to the production ID or production schedule. You haven't decremented the quantity on hand in the WIP location and a non-zero pending issue or pending yield loss quantity exists.

- Outstanding component shortages.

If you elected not to complete production with shortages, the system excludes any production ID or production schedule due to be closed that has component shortages. A component is considered short when the issued quantity is less than the current scheduled quantity.

- Remaining assemblies in process.

If any assemblies are remaining at an operation (the quantity issued to the location is greater than the quantity completed plus scrapped), they must first be scrapped or completed before you can close production.

- Production quantity hasn't been completed.

If the full production quantity hasn't been completed and you haven't selected the Close with Assemblies Remain check box, you can't close the production ID or production schedule. Additionally, if you've selected the option to close with assemblies remaining but the remaining assembly quantity exceeds the tolerance percentage, the production cannot be closed.

- Production quantity remaining uncompleted exceeds tolerance.

If you have selected the Close with Assemblies Remaining check box, but the remaining amount exceeds the Tolerance %, the production ID or production schedule won't be closed. For example, if you have an order quantity of 100, 80 of which are completed and you enter a tolerance of 5%, production won't be closed because at least 95 assemblies must be completed.

- Subcontracted purchase order quantity outstanding.

If the quantity of assemblies sent to the vendor isn't equal to the quantity of scrapped and completed assemblies received back from the vendor, then you can't close production. The outstanding assemblies must be reconciled before you can close production.

Important! Be aware that if you are closing a serial genealogy production ID with a status of Complete, you cannot close the production ID if there are outstanding serial IDs that have been associated but have not been completed or scrapped. All serial IDs that have been associated with the production ID must be accounted for—either they have been completed or scrapped.

After displaying the list of production you can't close, the report lists production that has been successfully closed. It also details the variances incurred, categorized by variance type.

If you are running this process in update mode (you didn't select the Report Only Mode check box), the status is set to Complete, Clsd/Labor (closed for labor), or Clsd/Acctg (closed for accounting), depending on the Close Production For group box level selected. The close date and time is updated with the current date and time for those production IDs or production schedules that you could close.

PeopleSoft Manufacturing records variances for production IDs and production schedules that you've closed for accounting. The system also posts these variances to the general ledger during the accounting line generation and journal generator processes.

When production is closed and an operation has costing post production time which hasn't yet been earned, the closing process calculates the earned labor and machine post production costs and updates the Earned Conversion Cost record accordingly.

See Also

PeopleSoft Managing Costs 8.8 PeopleBook, “Analyzing Manufacturing”

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS1100 - Production Close Report, page 666

Reopening Production

Occasionally, additional completions, material consumption, or actual hours must be recorded for production that has been closed. To complete these transactions, production must be reopened. When closing production, you can skip any intermediate status and close for accounting any production ID or production schedule quantity that is still in process. However, when reopening production, you can only go backward one status at a time. For example, you can only reset production to Closed for Labor from Closed for Accounting, or reset production to Complete from Closed for Labor.

Reopening production closed for accounting has several ramifications. When you reopen production that you've closed for accounting, PeopleSoft Manufacturing automatically reverses previously recorded variance entries, and if it records a favorable variance, it records an unfavorable entry for the same. The net effect is to zero out any previously recorded amount. When you close production for accounting again, the system completely recalculates variances based on the new production information.

Pages Used to Reopen Production

Page Name	Object Name	Navigation	Usage
Reopen Production	RUN_SFS1200	Production Control, Close and Analyze Production, Reopen Production, Production Selection	Select production to be reopened that was previously closed for accounting, closed for labor, or set to complete. Production must have a production status of <i>Pending Complete</i> or higher.
Reopen Status Selection	RUN_SFS1200A	Production Control, Close and Analyze Production, Reopen Production, Reopen Status Selection	Define additional reopen production criteria.

See Also

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” SFS1200 - Production Reopen Process Report, page 668

Defining Additional Reopen Production Criteria

Access the Reopen Status Selection page.

Current Status	Select a current production status for the production you'd like to reopen.
Curr Prdn Due/Close Dates (current production due/close dates)	Enter the appropriate dates. The system reopens any production that is currently closed for accounting, labor, or complete and whose accounting or labor close date or completed date falls within the date range specified. When reopening production in the Pending Complete status, production is set to In Process if the production due date falls within the date window specified.
Run	Click to run this request. Process Scheduler runs the Reopen Production (SFS1200) process at user-defined intervals. This process generates the Reopen Production Request report. The report details the before and after status of the production ID or production schedule once the process is complete. You can view the results of the variance postings and the reversal of the posting by running the Production Variance Report.

See Also

[Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS1500 - Production Variance Report, page 669](#)

CHAPTER 27

Archiving and Purging Production Data

This chapter provides an overview of the archive and purge production data process (SF_PURGE) and we describe how to:

- Archive and purge production data.
- Understand the ramifications of archiving and purging production data.

Understanding the Production Archive and Purge Process

PeopleSoft Manufacturing enables you to archive or purge production data contained in production tables to reduce storage needs and increase performance. You can move the production data into archive tables

Before you archive production data, keep this in mind:

- You can archive data for production IDs and production schedules.
- You can archive production data for configured orders (production IDs). However, configured orders must meet this criteria:
 - All lines on the related sales order must have a status of Closed or Canceled.
 - All lines on the direct production order must have a status of Closed or Canceled.
- You can archive data for teardown and rework production IDs.
- All manufacturing costing must be completed before you can archive production data. All components must be consumed or deleted before archiving or purging can occur.
- All manufacturing accounting lines must be posted to the general ledger before you can archive production data. If this posting process is not completed, the production orders will be disqualified during the qualification process.
- You cannot archive serial genealogy production data.
- You cannot purge production IDs that have subcontracted purchase orders.
- You may break certain relationships such as production ID splits and configured production orders.

See Also

PeopleSoft PeopleTools PeopleBook: Application Designer

[Chapter 27, “Archiving and Purging Production Data,” Understanding the Ramifications of Archiving and Purging Production Data, page 625](#)

Archiving and Purging Production Data

Once you've completed production, determine if you want to move or purge certain production data.

Pages Used to Archive and Purge Production Data

Page Name	Object Name	Navigation	Usage
Archive Production Data	RUN_SF_PURGE	Production Control, Close and Analyze Production, Archive Production Data, Archive Production Data	Select production data to be archived or purged.
Archive Parameters	RUN_SF_PURGE_PARM	Production Control, Close and Analyze Production, Archive Production Data, Archive Parameters	Enter selection criteria for the production data to be archived or purged.

Entering Parameters to Archive or Purge Production Data

Access the Archive Production Data page.

Archive Production Data | Archive Parameters

Run Control ID: ADHOC [Report Manager](#) [Process Monitor](#) **Run**

Process Request Parameters Find | View All First 1 of 1 Last

Process Frequency

- ☐ Process Once
- ☐ Always Process
- ☒ Don't Run

Purge Process Option

- ☒ Archive/Purge
- ☐ Purge

*Business Unit: US008

*Request ID: 1

Description:

Archive Production Data page

Purge Process Option

Select one of these options:

- Archive/Purge: Move selected data into ARCH (archive) tables and also purge the data from the production tables.
- Purge: Delete selected data from the production tables.

Selecting Archive Parameters

Access the Archive Parameters page.

Date, Select Production IDs, and Select Production Schedules	Select values based on All or a Range for production dates, production IDs, production areas, or item IDs.
	Note. Using the Date option enables you to select data based on the production <i>due</i> date.

Warning! The purging function is very powerful. Improper use might result in the unintentional loss of data. We recommend that you use the purging process only after you have been properly trained to use it. You should be completely familiar with the purging process.

Understanding the Ramifications of Archiving and Purging Production Data

Keep this in mind when you determine which production data you would like to archive or purge for:

- Production ID splits: If you purge this data, you would not be able to see the split history.
- Configured production IDs: When a configured production order is purged, you will not be able to access the Production ID link from the Direct Production Order inquiry page. This link enables you to access the Production ID Maintenance component. Therefore, you will not be able to view any transaction history associated with this configured order.
- Accounting line drilldowns: You must make sure that the accounting lines are posted to the journal entry prior to purging. Once you have purged the production data, you will not be able to see the accounting line drilldowns (Cost Management Line Drill Down page).

See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” Generating Production ID Splits, page 406

PeopleSoft Product Configurator 8.8 PeopleBook, “Using PeopleSoft Product Configurator”

PeopleSoft Managing Costs 8.8 PeopleBook, “Costing Transactions and Creating Accounting Entries”

CHAPTER 28

Scheduling Operations

This chapter provides an overview of the scheduling operations process and describes:

- Scheduling using PeopleSoft Manufacturing.
- Scheduling using PeopleSoft Supply Planning.
- Scheduling examples.

Understanding Production Scheduling and PeopleSoft Manufacturing

Using PeopleSoft Manufacturing, you can maintain the schedule for production using PeopleSoft Manufacturing's scheduling algorithms or PeopleSoft Supply Planning's solvers. Although PeopleSoft Supply Planning's solvers uses production data from PeopleSoft Manufacturing to create and maintain a production plan, it derives the schedule based on slightly different factors and scheduling algorithms than those used in PeopleSoft Manufacturing. PeopleSoft Manufacturing schedules each production ID or production schedule quantity independently of other production IDs or production schedules. It will not consider demands put on resources by other production when scheduling the individual production ID or production schedule quantity.

However, PeopleSoft Supply Planning can consider resource requirements across multiple production IDs or production schedules. PeopleSoft Supply Planning schedules and reschedules production so available capacity isn't exceeded in any one day.

Although it is recommended that you use PeopleSoft Supply Planning's solvers to schedule or optimize production, there are times when you might need to add or change a production ID or production schedule without running it through the solvers. If capacity is a concern in your environment, the actual start and due dates and times that PeopleSoft Manufacturing determines should be used only as a guideline or estimate.

These sections describe the factors that are involved in the scheduling of production using PeopleSoft Manufacturing and PeopleSoft Supply Planning. In addition, PeopleSoft Manufacturing scheduling algorithms are combined with examples to illustrate exactly how PeopleSoft Manufacturing schedules operations for production IDs and production schedules.

Scheduling Using PeopleSoft Manufacturing

If you are using PeopleSoft Manufacturing to schedule production, there are several factors that affect the actual start date and time and actual due date and time of each operation in addition to the planning lead times:

- Operation overlap, based on a percentage or send ahead quantity.
- Whether setup can occur during queue time or at any time once production begins.
- Whether or not setup time is included in scheduling the operation.
- Operation intensity.
- The work center calendar, if one exists.
- The production calendar, if one exists.
- The five-day work week calendar.

Note. If PeopleSoft Supply Planning is installed, you can't define queue planning lead times. Simultaneous setup and queue is not considered.

You define these factors for each business unit, item, work center, or routing. You can also define these factors when maintaining the operation list, if the production is in the Firm or Released status when an operation list has been created.

Maintaining Production Dates and Actual Dates

All production IDs and production schedules maintain production date and shift information as well as actual date and time information.

Production date and shift information is defined as the actual working day and shift (or manufacturing day and shift) where component and production scheduling may be done. You define your production dates and shifts through the production calendar or the work center calendars.

Actual date and time is defined as the actual date and time the production is scheduled to begin or end. In most cases, your production dates and actual dates are the same. If you have production shifts that span two days, your actual date for production may be different than the production date. The system determines your actual date by the actual time your production is scheduled to start or end within the production shift.

Defining a Production Scheduling Method

You define a production scheduling method when you create a new production ID. When you manually add a production ID, the system schedules it based on whether you know when you want to start production or when the item is due.

- If you decide to schedule the production ID based on the completion date and time, or due date and time, it is backward scheduled. In this case, the system calculates the actual start date and time. The production start date/shift as well as the production due date and shift associated with both the actual start date and time and due date/time are also determined.
- If you decide to schedule the production ID based on the actual start date and time, it is forward scheduled. In this case, the system determines when the assemblies will be complete, and calculates an actual due date and time. The production start date and shift as well as the production due date and shift associated with both the actual start date and time and due date and time are also determined.

PeopleSoft Manufacturing always backward schedules production schedules. When adding a new production schedule, you'll enter a production due date and production due shift for the production quantity. The system then calculates the production start date and production start shift. The actual start date and time as well as the actual due date and time are also calculated.

When changing the status for a production ID or production schedule to Firmed or Released, the system copies the item's routing and creates an operation list. As the system creates the operation list, it also determines the actual start date and time and actual due date and time for each operation. Once the system creates the operations list, it reschedules each operation any time it's modified.

Scheduling Using PeopleSoft Supply Planning

PeopleSoft Supply Planning takes several factors into account when determining the actual start and due date/time of production, teardown or rework orders, as well as the actual start date/time and actual due date/time of each operation. These factors include:

- Planning constraints.
- Material availability.
- Planning labor or machine setup, run, and fixed run times or run rates defined for each operation.
- Operation overlap.
- Operation intensity.
- Work center calendars, if they exist for the work centers associated with each operation.
- The production calendar, if one exists.
- The five-day work week calendar.

Note. Although you can maintain calendars in PeopleSoft Supply Planning, you must use the calendars maintained in PeopleSoft Manufacturing. The calendar data is sent to PeopleSoft Supply Planning with other production data when creating a PeopleSoft Supply Planning schedule.

You define these factors as you set up manufacturing data for each business unit, item, work center, or routing. You can also define these factors when maintaining the operation list, if the production is in the Firmed or Released status.

As PeopleSoft Supply Planning generates an optimized production plan, the system considers material and resource requirements across all production. Additionally, if an item's primary routing causes a constraint violation, the system considers an alternate routing. Once the routing has been selected, PeopleSoft Supply Planning schedules individual operations for new or existing production, again considering all constraints. The system then sends this information (in the form of planning messages) to PeopleSoft Manufacturing. These messages recommend that new production IDs or production schedules be added or existing production IDs and production schedules be rescheduled or canceled.

See Also

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner

Scheduling Examples

To understand how PeopleSoft Manufacturing creates and maintains operation schedules, let's run through some examples. These examples illustrate how the system calculates actual start and due dates/times for different operations using forward and backward scheduling.

Note. These examples assume you aren't using PeopleSoft Supply Planning's solvers to schedule production.

The examples use these types of shop floor operations:

- Example 1: Operations with no overlap; queue and setup done sequentially.
- Example 2: Operations with no overlap; queue and setup done concurrently; queue time is less than setup time.
- Example 3: Operations with no overlap, queue and setup done concurrently; setup time is less than queue time.
- Example 4: Operations with no overlap; setup not included.
- Example 5: Operation overlap, queue and setup done sequentially.

These production times are used for all examples:

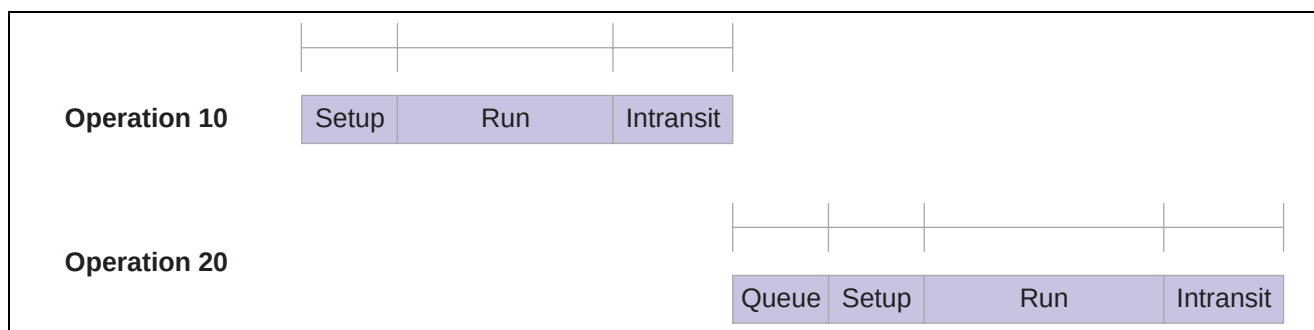
Op	Queue	Setup	Run	Intransit	Overlap
10	None	1 Hour	5 Hours (.5 hr/unit)	2 Hours	None
20	1 Hour	3 Hours	10 Hours (1 hr/unit)	1 Hour	None

Note. Even though PeopleSoft Manufacturing calculates start and due date and times to the minute, hours are used to make it easier to manually calculate these shop floor operation examples.

All examples assume a 24-hour day with a operation start quantity of 10 units. The start of the operation is when setup starts.

Example 1

This example uses operations with no overlap. The queue and setup are done sequentially.



Example 1: Queue time is 1 hour and set up is 3 hours

Operation	Operation Start	Run Start	Operation Due
10	Day 1, 8:00 a.m.	Day 1, 9:00 a.m.	Day 1, 2:00 p.m.
20	Day 1, 5:00 p.m.	Day 1, 8:00 p.m.	Day 2, 6:00 a.m.

Forward Scheduling Calculations:

Production ID Start Date/Time = Day 1, 8:00 a.m.

To calculate the start and due date/times for the first operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 start date/time	Production ID's start date/time	This calculation assumes that queue can't occur at the first operation.
2	Operation 10 run start date/time	Operation start date/time + setup time	None
3a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 10 run time (units/time)	Operation start quantity/ run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 10 due date/time	Run start date/time + run time	

To calculate start and due dates/times for the second operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20 start date/time	Prior operation's (Operation 10) due date/time + prior operation's intransit time + current operation's queue time	None

Step	To calculate	Use	Notes
2	Operation 20 run start date/time	Current operation start date/time + setup time	None
3a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 20 due date/time	Current operation run start date/time + run time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all subsequent operation due dates/times are calculated.

Backward Scheduling Calculations:

Production ID Due Date/Time = Day 2, 6:00 a.m.

To calculate the start and due date/times for the last operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20 due date/time	Production ID's due date/time - current operation's intransit time	None
2a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.

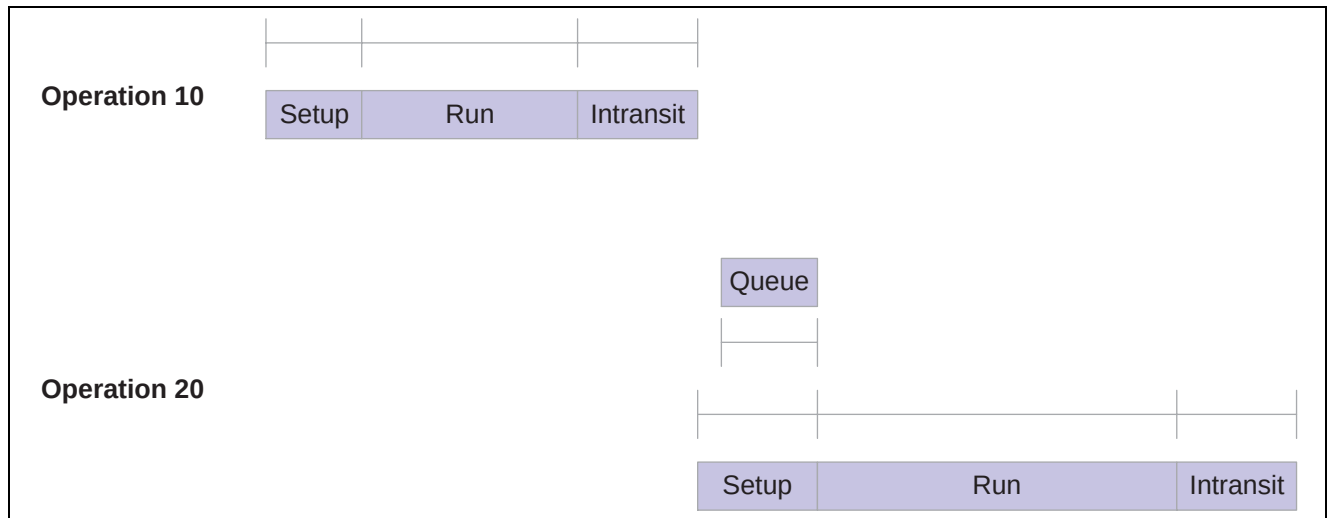
Step	To calculate	Use	Notes
3	Operation 20 run start date/time	Current operation's due date/time - run time	None
4	Operation 20 start date/time	Current operation's run start date/time - setup time	None

To calculate start and due dates/times for the prior operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 due date/time	Subsequent operation's (Operation 20) start date/time - subsequent operation's queue time - current operation's intransit time	None
2a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 10 run start date/time	Current operation's due date/time - run time	None
4	Operation 10 start date/time	Current operation's run start date/time - setup time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all prior operation due dates/times are calculated.

Example 2

This example uses operations with no overlap. The queue and setup are done concurrently. The queue time is less than the setup time.



Example 2: Queue time is 1 hour and set up is 3 hours

Operation	Operation Start	Run Start	Operation Due
10	Day 1, 8:00 a.m.	Day 1, 9:00 a.m.	Day 1, 2:00 p.m.
20	Day 1, 4:00 p.m.	Day 1, 7:00 p.m.	Day 2, 5:00 a.m.

Forward Scheduling Calculations:

Production ID Start Date/Time = Day 1, 8:00 a.m.

To calculate the start and due date/times for the first operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 start date/time	Production ID's start date/time	This calculation assumes that queue doesn't occur at the first operation.
2	Operation 10 run start date/time	Operation start date/time + setup time	None
3a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.

Step	To calculate	Use	Notes
3b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 10 due date/time	Run start date/time + run time	None

To calculate start and due dates/times for the second operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20 start date/time	Prior operation's (Operation 10) due date/time + prior operation's intransit time	This calculation assumes queue time is less than setup time.
2	Operation 20 run start date/time	Current operation start date/time + setup time	None
3a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 20 due date/time	Current operation run start date/time + run time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all subsequent operation due dates/times are calculated.

Backward Scheduling Calculations:

Production ID Due Date/Time = Day 2, 5:00 a.m.

To calculate the start and due date/times for the last operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20 due date/time	Production ID's due date/time - current operation's intransit time	None
2a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 20 run start date/time	Current operation's due date/time - run time	None
4	Operation 20 start date/time	Current operation's run start date/time - setup time	None

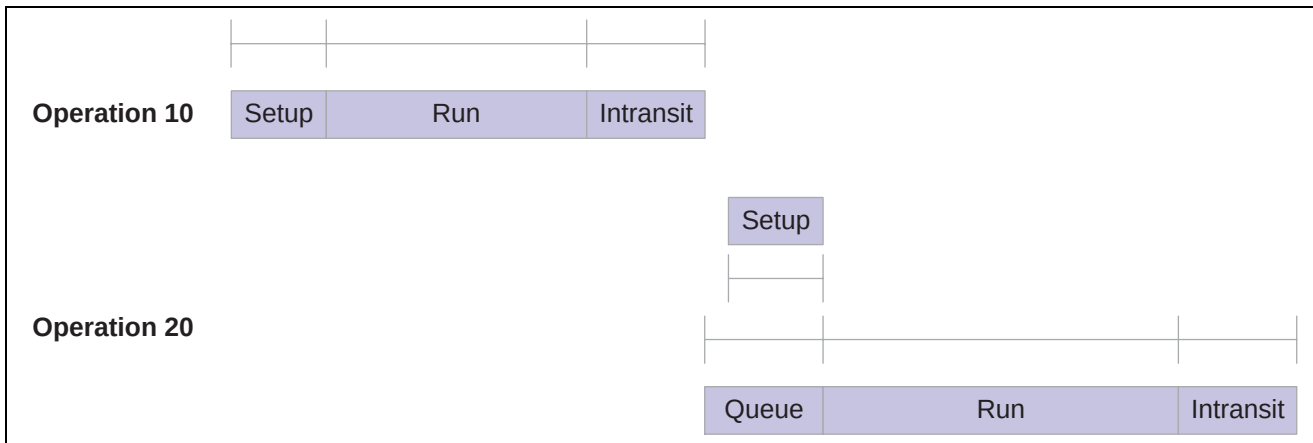
To calculate start and due dates/times for the prior operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 due date/time	Subsequent operation's (Operation 20) start date/time - current operation's intransit time	This calculation assumes queue time is less than setup time.
2a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.

Step	To calculate	Use	Notes
3	Operation 10 run start date/time	Current operation's due date/time - run time	None
4	Operation 10 start date/time	Current operation's run start date/time - setup time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all prior operation due dates/times are calculated.

Example 3

This example uses operations with no overlap. The queue and setup are done concurrently. The setup time is less than the queue time.



Example 3: Queue time takes 3 hours and setup takes 1 hour

Operation	Operation Start	Run Start	Operation Due
10	Day 1, 8:00 a.m.	Day 1, 9:00 a.m.	Day 1, 2:00 p.m.
20	Day 1, 6:00 p.m.	Day 1, 7:00 p.m.	Day 2, 5:00 a.m.

Forward Scheduling Calculations:

Production ID Start Date/Time = Day 1, 8:00 a.m.

To calculate the start and due date/times for the first operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 start date/time	Production ID's start date/time	This calculation assumes that queue doesn't occur at the first operation.
2	Operation 10 run start date/time	Operation start date/time + setup time	None
3a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 10 due date/time	Run start date/time + run time	None

To calculate start and due dates/times for the second operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20 start date/time	Prior operation's (Operation 10) due date/time + prior operation's intransit time + (queue - setup time of current operation)	This calculation assumes setup time is less than queue time.
2	Operation 20 run start date/time	Current operation start date/time + setup time	None
3a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.

Step	To calculate	Use	Notes
3b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 20 due date/time	Current operation run start date/time + run time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all subsequent operation due dates/times are calculated.

Backward Scheduling Calculations:

Production ID Due Date/Time = Day 2, 5:00 a.m.

To calculate the start and due date/times for the last operation (Operation 20):

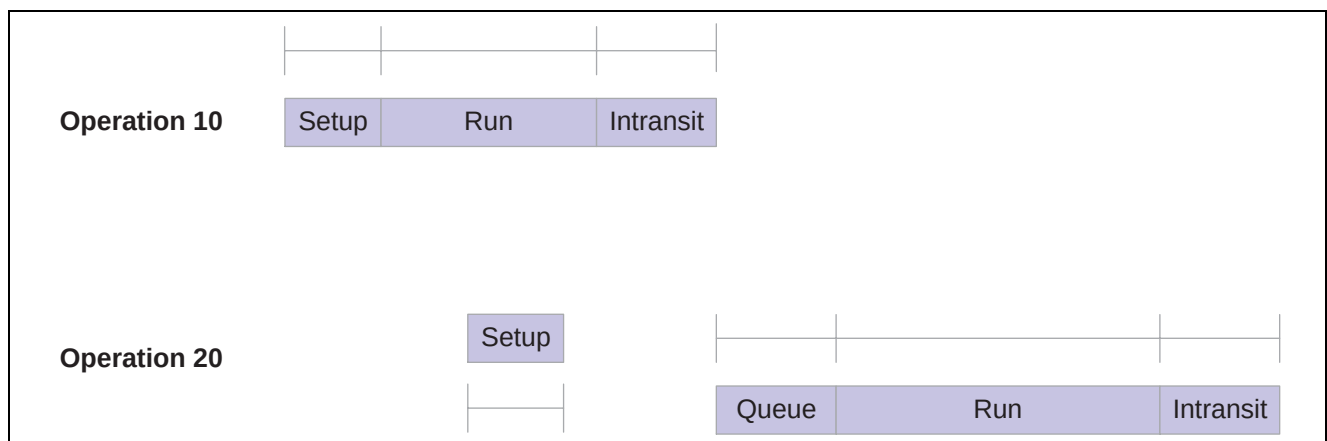
Step	To calculate	Use	Notes
1	Operation 20 due date/time	Production ID's due date/time - current operation's intransit time	None
2a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 20 run start date/time	Current operation's due date/time - run time	None
4	Operation 20 start date/time	Current operation's run start date/time - setup time	None

To calculate start and due dates/times for the prior operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 due date/time	Subsequent operation's (Operation 20) start date/time - (queue time - setup time of subsequent operation) - current operation's intransit time	This calculation assumes setup time is less than queue time.
2a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 10 run start date/time	Current operation's due date/time - run time	None
4	Operation 10 start date/time	Current operation's run start date/time - setup time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all prior operation due dates/times are calculated.

Example 4

This example uses operations with no overlap. The setup is not included.



Example 4: Queue time is 3 hours

Operation	Operation Start	Run Start	Operation Due
10	Day 1, 8:00 a.m.	Day 1, 9:00 a.m.	Day 1, 2:00 p.m.
20	Day 1, 2:00 p.m.	Day 1, 5:00 p.m.	Day 2, 3:00 a.m.

Forward Scheduling Calculations:

Production ID Start Date/Time = Day 1, 8:00 a.m.

To calculate the start and due date/times for the first operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 start date/time	Production ID's start date/time	This calculation assumes that queue doesn't occur in the first operation.
2	Operation 10 run start date/time	Operation start date/time + setup time	Setup is always included at the first operation.
3a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 10 due date/time	Run start date/time + run time	None

To calculate start and due dates/times for the second operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20 start date/time	Prior operation's (Operation 10) due date/time + prior operation's intransit time + current operation's queue time - current operation's setup time	This calculation assumes setup can be completed any time after the first operation run has started. The start date/time represents the latest possible time you should begin setup.
2	Operation 20 run start date/time	Current operation start date/time + setup time	None
3a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 20 run time (units/time)	Operation start quantity/ run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 20 due date/time	Current operation run start date/time + run time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all subsequent operation due dates/times are calculated.

Backward Scheduling Calculations:

Production ID Due Date/Time = Day 2, 3:00 a.m.

To calculate the start and due date/times for the last operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20 due date/time	Production ID's due date/time - current operation's intransit time	None
2a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.

Step	To calculate	Use	Notes
2b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 20 run start date/time	Current operation's due date/time - run time	None
4	Operation 20 start date/time	Current operation's run start date/time - setup time	This calculation assumes setup can be completed any time after the first operation run has started. The start date/time represents the latest possible time you should begin setup.

To calculate start and due dates/times for the prior operation (Operation 10):

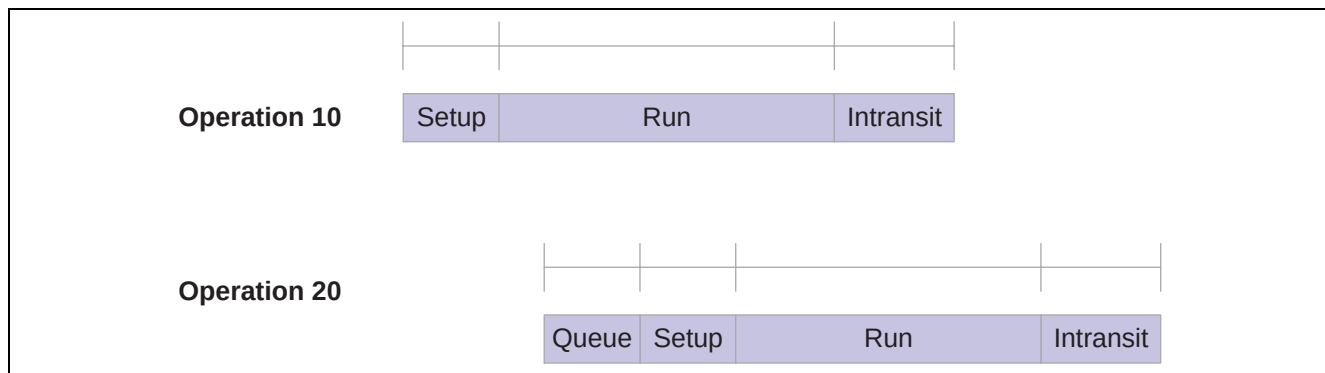
Step	To calculate	Use	Notes
1	Operation 10 due date/time	Subsequent operation's (Operation 20) start date/time - subsequent operation's queue time - current operation's intransit time	The run start date/time is used and setup isn't included. The setup at Operation 20 can be completed at the same time the prior operation is being run.
2a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.

Step	To calculate	Use	Notes
3	Operation 10 run start date/time	Current operation's due date/time - run time	None
4	Operation 10 start date/time	Current operation's run start date/time - setup time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all prior operation due dates/times are calculated.

Example 5

In this example the operations overlap. The queue and setup are done sequentially.

Assume operations have overlap expressed as a percent (100% = total overlap, 0% = no overlap) or send ahead quantity. If overlap is expressed as a percentage, assume all units are available for processing at the start of run or soon after.



Example 5: 80% overlap or a send ahead quantity of 2 units

Operation	Operation Start	Run Start	Operation Due
10	Day 1, 8:00 a.m.	Day 1, 9:00 a.m.	Day 1, 2:00 p.m.
20	Day 1, 1:00 p.m.	Day 1, 4:00 p.m.	Day 2, 2:00 a.m.

Forward Scheduling Calculations:

Production ID Start Date/Time = Day 1, 8:00 a.m.

To calculate the start and due date/times for the first operation (Operation 10):

Step	To calculate	Use	Notes
1	Operation 10 start date/time	Production ID's start date/time	This calculation assumes that queue doesn't occur in the first operation.
2	Operation 10 run start date/time	Operation start date/time + setup time	None
3a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 10 due date/time	Run start date/time + run time	None

To calculate start and due dates/times for the second operation (Operation 20):

Step	To calculate	Use	Notes
1a, or	Operation 20 start date/time; overlap expressed as a percentage	Prior operation's (Operation 10) start of run + [prior operation's total run time x (1 - overlap percent / 100)] + prior operation's intransit time + current operation's queue time	None
1b	Operation 20 start date/time; overlap expressed as a send ahead quantity	Prior operation's (Operation 10) start of run + (prior operation's run rate x send ahead quantity, converted to hours) + prior operation's fixed run time + prior operation's intransit time + current operation's queue time	None
2	Operation 20 run start date/time	Current operation start date/time + setup time	None

Step	To calculate	Use	Notes
3a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
3b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
4	Operation 20 due date/time	Current operation run start date/time + run time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all subsequent operation due dates/times are calculated.

Backward Scheduling Calculations:

Production ID Due Date/Time = Day 2, 2:00 a.m.

To calculate the start and due date/times for the last operation (Operation 20):

Step	To calculate	Use	Notes
1	Operation 20's due date/time	Production ID's due date/time - current operation's intransit time	None
2a, or	Operation 20 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 20 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 20 run start date/time	Current operation's due date/time - run time	None
4	Operation 20 start date/time	Current operation's run start date/time - setup time	None

To calculate start and due dates/times for the prior operation (Operation 10), with an operation overlap expressed as a percentage:

Step	To calculate	Use	Notes
1	Operation 10 due date/time, when operation overlap is expressed as a percentage	Subsequent operation's (Operation 20) start date/time - subsequent operation's queue time - current operation's intransit time + [current operation's total run time x (overlap percent / 100)]	None
2a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 10 run start date/time	Current operation's due date/time - run time	None
4	Operation 10 start date/time	Current operation's run start date/time - setup time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all prior operation due dates/times are calculated.

To calculate start and due dates/times for the prior operation (Operation 10), with an operation overlap expressed as a send ahead quantity:

Step	To calculate	Use	Notes
1	Operation 10 due date/time, when operation overlap is expressed as a send ahead quantity	Subsequent operation's (Operation 20) start date/time - current operation's intransit time - subsequent operation's queue time + [current operation's run time x (Operation start quantity - send ahead quantity)]	None

Step	To calculate	Use	Notes
2a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of time per unit.
2b	Operation 10 run time (units/time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if run rate is in terms of units per time unit.
3	Operation 10 run start date/time	Current operation's due date/time - run time	None
4	Operation 10 start date/time	Current operation's run start date/time - setup time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all prior operation due dates/times are calculated.

APPENDIX A

Delivered Workflows for PeopleSoft Manufacturing

This appendix discusses delivered workflows for PeopleSoft Manufacturing.

See Also

PeopleSoft PeopleTools PeopleBook: Workflow

PeopleSoft PeopleTools PeopleBook: Using PeopleSoft Applications

Chapter 4, “Establishing Production Calendars,” page 45

Chapter 8, “Maintaining Bills of Material,” page 147

Chapter 13, “Maintaining Tasks,” page 269

Chapter 12, “Defining Work Centers,” page 251

Chapter 14, “Structuring Routings,” page 281

Chapter 18, “Maintaining Production Orders and Production Schedules,” page 371

Chapter 22, “Issuing Material to Production,” page 481

Chapter 23, “Completing Operations and Recording Scrap,” page 521

Chapter 26, “Closing Production,” page 615

Delivered Workflows for PeopleSoft Manufacturing

This section discusses PeopleSoft Manufacturing workflows. The workflows are listed alphabetically by workflow name.

Assembly Prdn Schedule Scrap Notification

This section discusses the Prdn Schedule Scrap Notification workflow.

Description

Event Description	Assembly scrap is recorded against a production schedule.
Action Description	Notifies the planner that assembly scrap has occurred on a production schedule.
Notification Method	Worklist

Workflow Objects

Event	Assy Sched Scrap Notification
Workflow Action	Assy Sched Scrap Notification
Role	Planner

Assembly PID Scrap Notification

This section discusses the Assembly PID Scrap Notification workflow.

Description

Event Description	Assembly scrap is recorded against a production ID.
Action Description	Notifies the planner that assembly scrap has occurred on a production ID.
Notification Method	Worklist

Workflow Objects

Event	Assy PID Scrap Notification
Workflow Action	Assy PID Scrap Notification
Role	Planner

BOM Change

This section discusses the BOM Change workflow.

Description

Event Description	A BOM is changed in PeopleSoft Manufacturing.
Action Description	Notifies the Manufacturing Engineering that a BOM has changed.
Notification Method	Worklist

Workflow Objects

Event	BOM Change Notification
Workflow Action	BOM Change Notification
Role	Manufacturing Engineer

Identify Production with Pending Quantities

The section discusses the Identify Production with Pending Quantities workflow.

Description

Event Description	Run the PeopleSoft Application Engine SF_WFPRDCMP process.
Action Description	Notifies the production supervisor that there is non-zero quantity in the pending issue quantity or pending loss quantity fields of a component.
Notification Method	Worklist

Workflow Objects

Event	SF_PRDN_PENDQTY
Workflow Action	SF Prdn Comp Pending Qty
Role	Production Supervisor

Potential Prdn Variance Report

The section discusses the Potential Prdn Variance Report workflow.

Description

Event Description	Run the PeopleSoft Application Engine SF_VARJB process to generate a Potential Production Variance Report.
Action Description	Runs the Production Variance Report and emails the variance report to the production supervisor for review.
Notification Method	Email

Workflow Objects

Event	POTENTIAL_PRDN_VARIANCE
Workflow Action	Potential Prdn Variance Report
Role	Production Supervisor

Production Calendar Change

The section discusses the Production Calendar Change workflow.

Description

Event Description	A production calendar is changed.
Action Description	When the production calendar is changed, a worklist notification is dispatched to the planner. Calendar changes include adding, changing or deleting shifts. The planner may need to reschedule production.
Notification Method	Worklist

Workflow Objects

Event	Calendar Notification
Workflow Action	Prdn Calendar
Role	Planner

Production ID Change

The section discusses the Production ID Change workflow.

Description

Event Description	A production ID is change in the Maintain PIDs component.
Action Description	Notifies the planner that a production ID was changed.
Notification Method	Worklist

Workflow Objects

Event	Production Change Notification
Workflow Action	Production Change Notification
Role	Planner

Production Ready to Close

The section discusses the Production Ready to Close workflow.

Description

Event Description	Run PeopleSoft Application Engine SF_WFPNDPDN process
Action Description	Notifies the production supervisor that production has a status of Pending Complete.
Notification Method	Worklist

Workflow Objects

Event	PRDN_PENDING
Workflow Action	Notify Pending Production
Role	Production Supervisor

Replenishment Notification

The section discusses the Replenishment Notification workflow.

Description

Event Description	Inventory reaches a minimum quantity during backflush, completions, or editing and issuing components.
Action Description	Notifies inventory clerk that a WIP location item's quantity has fallen below the reorder point and initiates a material stock request.
Notification Method	Worklist

Workflow Objects

Event	Replenishment Notification
Workflow Action	Replenishment Notification
Role	Inventory Clerk

Routing Change

The section discusses the Routing Change workflow.

Description

Event Description	A routing is changed in the Maintain Routings component.
Action Description	When a routing is changed, a notification is sent to the Manufacturing Engineer.
Notification Method	Worklist

Workflow Objects

Event	Routing Change Notification
Workflow Action	Routing Change Notification
Role	Manufacturing Engineer

Task Change

The section discusses the Task Change workflow.

Description

Event Description	A task is changed in the Maintain Tasks component.
Action Description	When a task is changed, a notification is sent to the Manufacturing Engineer.
Notification Method	Worklist

Workflow Objects

Event	Task Change Notification
Workflow Action	Task Change Notification
Role	Manufacturing Engineer

Work Center Calendar Code Change

The section discusses the Work Center Calendar Code Change workflow.

Description

Event Description	Change data for a work center calendar.
Action Description	When adding, changing or deleting shifts on a Calendar Code associated with a work center a notification is sent to the Planner. The Planner may want to reschedule Production.
Notification Method	Worklist

Workflow Objects

Event	Calendar Code Notification
Workflow Action	Calendar Code Changed
Role	Planner

Workcenter Change

The section discusses the Workcenter Change workflow.

Description

Event Description	A work center is changed in the Maintain Work Centers component.
Action Description	When information associated with a work center is changed, a notification is sent to the Manufacturing Engineer.
Notification Method	Worklist

Workflow Objects

Event	WC Change Notification
Workflow Action	WC Change
Role	Manufacturing Engineer

APPENDIX B

PeopleSoft Manufacturing Report Descriptions

PeopleSoft applications offer a wide range of query and reporting possibilities. In addition to the standard reports that we deliver, we also provide reporting tools that you can use to create new reports from scratch.

If you purchased any of these PeopleSoft applications in addition to PeopleSoft Manufacturing, you'll find the reports applicable to these applications in their respective PeopleBook:

- PeopleSoft Engineering
- PeopleSoft Flow Production
- PeopleSoft Cost Management
- PeopleSoft Supply Planning

See Also

PeopleSoft Reporting Tools

PeopleSoft Manufacturing Reports: General Description

This table lists the PeopleSoft Manufacturing reports. All the reports that are listed are SQR reports. If you need more information about these reports, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
ENS1000 BOM Report	Lists the components on either manufacturing or engineering BOMs.	• Manufacturing Definitions, BOMs and Revisions, Reports, Bills of Material • Engineering, BOMs and Revisions, Reports, Bills of Material, EBOM Report	EN_BOM_REPORT
ENS1001 Routing Report	Lists the routing information for manufacturing or engineering routings.	• Manufacturing Definitions, Resources and Routings, Routings, Routing Report • Engineering, Routings, Engineering Routing Report, Routing Report	RUN_ENS1001

Report ID and Report Name	Description	Navigation	Run Control Page
ENS1002 Compare Routings Report	Lists the differences between two manufacturing routings, two engineering routings, or one manufacturing routing and one engineering routing. Comparisons can also be based on the same item with different routing codes.	- Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison Report, Routing Compare Report - Engineering, Routings, Eng Routing Comparison Report, Routing Compare Report	RUN_ENS1002
ENS1003 Master Routing Where Used Report	Lists all items that reference another item as its master routing along with production data. This report is used in both Manufacturing and Engineering.	- Manufacturing Definitions, Resources and Routings, Routings, Master Rtg Where Used Report - Engineering, Routings, Eng Master Routing Where Used, Master Rtg Where Used Report	RUN_ENS1003
ENS1004 Resources Where Used Report	Lists where resources are used on work centers, tasks, routings, and in production.	Manufacturing Definitions, Resources and Routings, Resources Where Used Report	RUN_ENS1004
ENS1005 Compare BOMs Report	Lists the differences between a manufacturing and an engineering BOM, or two engineering BOMs.	- Manufacturing Definitions, BOMs and Revisions, Reports, BOM Comparison Report, BOM Compare Report - Engineering, BOMs and Revisions, Reports, EBOM Comparison, EBOM Compare Report	EN_BOM_COMP_REPORT
ENS1006 Work Centers Where Used Report	Lists the tasks, routings, and production associated with either a selected work center or a range of work centers within a particular business unit.	Manufacturing Definitions, Tasks and Work Centers, Work Centers Where Used Report	RUN_ENS1006
ENS1007 Tasks Where Used Report	Lists the routings and production associated with either a selected task or a range of tasks within a particular business unit.	Manufacturing Definitions, Tasks and Work Centers, Tasks Where Used Report	RUN_ENS1006B
ENS1010 BOM Cost Report	Lists the component costs on either manufacturing or engineering BOMs.	- Manufacturing Definitions, BOMs and Revisions, Reports, BOM Costed, BOM Costed Report - Engineering, BOMs and Revisions, Reports, EBOM Costed Report	EN_BOM_COST_REPORT

Report ID and Report Name	Description	Navigation	Run Control Page
ENS2000 Item Where Used Report	Lists all the BOMs on which an item appears either as a component or a substitute for a component. You'll find this information useful when you want to analyze the impact component changes can have on all existing BOMs.	- Manufacturing Definitions, BOMs and Revisions, Reports, Item Where Used - Engineering, BOMs and Revisions, Reports, Item Where Used	EN_WHEREUSED_RPT
SFS1100 Production Close Process Report	Lists closed production schedules or production IDs, and details the variances incurred. Combine sort options to narrow down the production close information that is reported. For example, close only those production IDs within a selected production area for a single item. Use the Report Only Mode to view the production that can and can't be closed as well as the variances that can be generated as a result of an accounting close.	Production Control, Close and Analyze Production, Close Production	RUN_SFS1100
SFS1200 Production Reopen Process Report	Lists the before and after status of the production ID or area/item that needs to be reopened. Combining numerous sort options assists in narrowing down the production reopen information that is reported. For example, reopen production only for those production IDs within a selected production area for a single item. Use the Report Only Mode to provide a preview of the financial impact of reopening production without creating reversing entries.	Production Control, Close and Analyze Production, Reopen Production	RUN_SFS1200
SFS1500 Production Variance Report	Lists variances for production IDs or production schedules for a specified production due date/shift and above a minimum monetary amount. Variances include configuration, usage, component yield, lot size, routing process, rework, teardown, production mix variance, and outside processing.	Production Control, Close and Analyze Production, Production Variance Report	RUN_SFS1500

Report ID and Report Name	Description	Navigation	Run Control Page
SFS1600 Potential Production Variance Report	Lists potential production variances that exist in production above a monetary amount, prior to closing for accounting production IDs and schedules. The report can be generated when in a production status of in process, pending complete, complete, and closed for labor. Variances include configuration, usage, component yield, lot size, routing process, rework, teardown, production mix variance, and outside processing.	Production Control, Close and Analyze Production, Potential Prdn Variance Report	RUN_SFS1600
SFS2001 Material Shortage Report	Lists production shortages as well as surplus inventory. Report options include a summary report or a report that ignores surplus quantities.	Production Control, Close and Analyze Production, Shortage Report	RUN_SFS2001
SFS2002 Dispatch List	Lists production ID or production schedule information, including operation and task details for each work center or range of work centers. Use this document to review the type and quantity of production that will be occurring at a particular work center or range of work centers for a specified date or range of dates. Selects production information by production start date or due date, or lists production that is past due. Additional report information includes component information for each work center/operation, operation start and due dates/times, subcontracted operation information, and production and operation level text.	Production Control, Process Production, Release Production, Print Dispatch List	RUN_SFS2002

Report ID and Report Name	Description	Navigation	Run Control Page
SFS2003 Production Documents	Lists the component list, operation list, and work center, resource, and schedule information for a particular production ID. Print production documents for production IDs with a production document status of Ready to Print, reprint production documents, or print production documents for the specified production IDs regardless of the production document print status.	Production Control, Process Production, Release Production, Print Production Documents	RUN_SFS2003
SFS2004 Production Report	Lists all scheduled production for a specified range of actual start dates, production statuses, and production IDs and production schedules. Sort by actual due date, item ID, production area, production due date, or production start date.	Production Control, Define Production, Reports, Production Report	RUN_SFS2004
SFS2005 Efficiency and Utilization Report	Lists variances and utilization by operation, work center, production ID, and production area/item for both labor and machine. Report earned and actual labor by work center with or without the production ID or production schedule detail.	Production Control, Close and Analyze Production, Efficiency and Util Rpt	RUN_SFS2005
SFS2006 Component Where Used in Prdn Report	Lists the production IDs or production schedules where specified components are used in production. This report can be sorted by item ID, production due shift, production start date, or production ID. Also lists substitute information for the component, and can include production with a status of Firmmed, Released, In Process, Pending Complete, Complete, Closed for Labor, and Closed to Accounting.	Production Control, Define Production, Reports, Component Where Used Report	RUN_SFS2006

Report ID and Report Name	Description	Navigation	Run Control Page
SFS2007 Production Schedule by Area Report	Lists total production quantities by item for each calendar day within a 14-day period for each business unit and production area. Includes number of items scheduled for completion for each day. Sort by inventory item and production due date.	Production Control, Define Production, Reports, Schedule by Area Report	RUN_SFS2007
SFS2008 Subcontracted PO Report	Lists purchase orders and PO numbers for subcontracted production IDs with the statuses of Firm, Released, In Process, Pending/Complete and Complete. Sort by production start date of the subcontracted production ID, by the purchase order due date, production area, production item, purchase order number, or purchase order due date.	Production Control, Process Production, Subcontract Production, Subcontracted PO Report	RUN_SFS2008
SFS6000 Material Picking Plan	Generates picking plan instructions for stockroom processing. Lists all items to be picked by location, component, or production ID and production schedule for a specified production start date range. Picking plan options include the PUSH or PULL method.	Production Control, Process Production, Issue Materials, Create Picking Plan	RUN_SFS6000
SFS8000 Genealogy Exception Report	Generate a report that lists those serial production IDs that have genealogy inconsistencies.	Production Control, Process Production, Production Genealogy, Genealogy Exception Report	RUN_SF_TRC001

PeopleSoft Manufacturing Reports: A to Z

This section contains detailed information pertaining to many reports.

ENS1000 - BOM Report

Print Options

These options denote detailed information you may want to appear on the hardcopy report. You can select All attributes of the BOM or Selected attributes. Attributes include:

- Substitutes: Substitute items for the BOM components, if any exist.

- Lower Level Outputs: Primary, co- and by-product items at lower levels of the BOM.
- Component Dimensions: Actual dimensions of the component such as height, length, width, and weight.
- Reference Designators: The alphanumeric code you can use to determine where a component is placed in an assembly.
- Component Text: Any text associated with the BOM components.
- Component Attachments: The names of any associated assembly attachments.
- Component Documents: The names of any associated assembly documents.

Note. The names of Component Documents print only if PeopleSoft Engineering is installed.

- Assembly Text: Any text associated with the assembly.
- Assembly Attachments: Names of any attachments (files) such as CAD drawings or product specifications.
- Assembly Documents: Names of any associated documents used during assembly such as CAD drawings or product specifications.

Note. The names of any Assembly Documents will print only if PeopleSoft Engineering is installed.

ENS1001 - Routing Report

Print Options

These options denote detailed information you may want to appear on the report. You can choose either All or Selected attributes to print such as:

- Header Documents: Any text associated with the routing header information.
- Header Attachments: Any attachments (files) associated with the routing header information.
- Operation Resources: Resources that are being used at the operation step.
- Operation Time: The times necessary to complete this operation. This may include tasks and run rates such as fixed run, post production, run, and setup times.
- Conversion Code: Cost codes that determine the labor, machine, outside processing, and overhead cost of the operation.
- Operation Documents: Lists the names of any documents associated with the operation such as CAD drawings or product specifications.
- Operation Attachments: Lists the names of routing operation attachments.

ENS1002 - Compare Routings Report

This report includes baseline routing and target routing.

Baseline Routing (RTG1):

Select a Routing State: *Engineering* or *Manufacturing*.

Select an Item ID range and a valid Routing Code.

Target Routing (RTG2):

The Routing State defaults to *Engineering*; it is a display-only field.

Select an Item ID and a valid Routing Code.

To compare one routing code to another (for example, the primary routing to one of the item's alternates), enter the primary routing code (1) as the From and To routing for the Baseline Routing (RTG1). Then enter as the Target Routing (RTG2) the alternate routing code to which you'd like to compare the primary.

To see if any of an item's routings are comparable to another item's routing, enter the Baseline routing codes (1 to 99 to compare the primary and all alternates) and the Target's routing code to which all routings will be compared.

Print Options

These options denote detailed information you may want to appear on the report. You can select All of the listed attributes or Selected attributes. Attributes include:

- Header Detail: Information such as routing type, routing code, and routing state is printed on the report.
- Header Documents: Any documents associated with the routing header information.
- Header Attachments: Any attachments (files) associated with the routing header information.
- Ops Sequence (operation sequence): The operation step that components or tasks may be added.
- Subcontractor Detail: If the operation step is a subcontracted operation, the vendor information will be printed on the report.
- Operation Text: Any text associated with the operation step.
- Conversion Code: Cost codes that determine the labor, machine, outside processing, and overhead cost of the operation.
- Operation Resources: Resources that are being used at the operation step.
- Operation Time: The times necessary to complete this operation. This may include tasks and run rates such as fixed run, postproduction, run, and setup times.
- Operation Documents: Lists the names of any documents associated with the operation such as CAD drawings or product specifications.

Note. The Operation Documents print option is available only if you have PeopleSoft Engineering installed.

- Operation Attachments: Lists the names of routing operation attachments.

ENS1003 - Master Routing Where Used Report

Print Production Details Select this check box if you want to print production information for All dates or a Range of dates. The report will include all production whose start date falls within the criteria selected.

Status Selection You can include production by selecting any of these statuses:

- Entered
- Firmed
- Released
- In Process
- Pend Complete (pending complete)
- Complete
- Clsd Labor (closed to labor)
- Clsd Acctg (closed to accounting)
- Canceled

ENS1004 - Resources Where Used Report

Report Request Parameters You can select All, None, or a Range for these resources:

- Crew Name
- Machine Code
- Tool ID

Select Print All Usages or Print Selected Usages and one of these check boxes:

Work Centers Lists all work centers where the selected crew, machine, or tool is specified as a primary or alternate resource.

Tasks Lists all tasks that use selected crew, machine, or tool resources.

Routings Lists all routings that use selected crews, machines, or tool specified as a primary or alternate resource. However, differences might occur when changes have been made to the specific item's routing.

Production Lists all production IDs or production schedules that use selected crew, machine, or tool resources.

ENS1005 - BOM Compare Report

Use the BOM Compare Report to compare any two engineering BOMs or a manufacturing BOM and an engineering BOM within the same business unit. Using this report, you can compare one or more baseline BOMs to one target BOM. In the Baseline BOM (BOM1) group box, specify the Item ID BOM that will serve as the basis for comparison. The baseline BOM may have an Engineering or Manufacturing BOM state. The Item ID you specify in the Target BOM (BOM2) group box is the BOM you are comparing with the Baseline BOM (BOM1). The Target BOM has an Engineering BOM State.

Differences

This field behaves the same way for all pages in this group. It displays the differences between the two BOMs.

- *Added:* The Component ID has been added to the compare BOM (BOM2).
- *Deleted:* The component has been deleted from the compare BOM (BOM2).

The system determines whether a component has been deleted, by comparing the component IDs, operation sequences, and effectivity dates: this is what makes a component unique within a BOM.

- *Chg BOM1:* If you have made a component change, you will see the components listed.

The system lists a change when any information other than Component ID, Op Seq (operation sequence), or Eff Date (effective date) has changed.

- *Chg BOM2:* If you have made a component change, you will see the components listed.

The system lists a change when any information other than Component ID, Op Seq (operation sequence), or Eff Date (effective date) has changed.

The report includes component and assembly differences between the two BOMs so that you can use it to track changes.

Baseline BOM (BOM1):

Select the BOM State: *Engineering* or *Manufacturing*.

Select an Item ID and a valid BOM Code from the available options.

If you want to use the BOM with a code of 1, select 1 in both fields. You can also compare all the existing BOMs for the item to the target routing by selecting the appropriate BOM codes.

Select the All Dates/Revs check box if you want to compare all effective dates and revisions for the baseline BOM(s). If you want to compare a BOM with a specific effective date, don't select the All Dates/Revs check box, and enter the specific Eff Date (effective date).

Target BOM (BOM2):

The BOM State field defaults to *Engineering*; it is display-only.

Select an Item ID and a valid BOM Code for the target BOM.

Select the All Dates/Revs check box if you want to compare all effective dates and revisions for the BOM. If you want to compare a BOM with a specific effective date, enter the specific Eff Date (effective date).

Print Options

These options denote detailed information you may want to appear on the hardcopy report. You can select All attributes of the BOM or Selected attributes. Attributes include:

- **Component Documents:** The names of any associated assembly documents.

Note. The names of Component Documents will print only if PeopleSoft Engineering is installed.

- **Component Attachments:** The names of any associated assembly attachments.
- **Component Text:** Any text associated with the BOM components.
- **Reference Designators:** The alphanumeric code you can use to determine where a component is placed in an assembly.
- **Substitutes:** Substitute items for the BOM components, if any exist.
- **Component Dimensions:** Actual dimensions of the component such as height, length, width, and weight.
- **Top Level Outputs:** Parent assembly items only.
- **Assembly Header:** Any text associated with the assembly.
- **Assembly Documents:** Names of any associated documents used during assembly such as CAD drawings or product specifications.

Note. The names of any Assembly Documents will print only if PeopleSoft Engineering is installed.

- **Assembly Attachments:** Names of any attachments (files) such as CAD drawings or product specifications.

ENS1006 - Work Centers Where Used Report

Select All or a Range of work centers to be included in the report.

Print Options denote the detailed work center where-used information that you might want to appear on the hard-copy report. You can select any of these print options: Tasks, Routings, and Production.

ENS1007 - Tasks Where Used Report

Print Options denote detailed task where-used information that you might want to print on the hard-copy report. You can select any of these print options:

Routings

Lists all routings that use selected crews, machines, or tools that are specified as a primary or alternate resource. However, differences might occur when changes have been made to the specific item's routing.

Production

Lists all production IDs or production schedules that use selected crew, machine, or tool resources.

ENS1010 - BOM Cost Report

Report request parameters include:

Item ID	Select All or Range to specify which item IDs to include.
Cost Type and Cost Version	The cost version you select must be valid for the cost type. You need to have rolled up costs using the particular combination of cost type and version in order to display the selected BOMs.
BOM Code and Routing Code	All items selected are costed using this BOM code and routing code combination. You can select any BOM code, but the system always calculates lower levels using the primary BOM code (1).
Cost as Batch	Select if the BOM has multiple outputs.
Print Lower Level Outputs	Select this check box if you want the hard-copy report to include the costs of multiple output items for components that are themselves end items.
Eff Date and Depth	Enter these values for the BOM you want to display.
Note. It's best to select the maximum depth for revision-controlled bills of material.	
Print Lower Level Outputs	If you want the hardcopy report to include the costs of multiple output items for components that are themselves end items, select this check box.

ENS2000 - Item Where Used Report

Item ID Range	Select the radio buttons to determine which items to search for. Options are: • <i>Components</i>: Searches to see if the items are specified as a component on a BOM. • <i>Substitutes</i>: Searches to see if the items are substitute items on a BOM. • <i>Outputs</i>: Searches to see if the items are substitute items on a BOM. • <i>All</i>: Searches to see whether items are components or substitutes. • <i>Range</i>: Searches for a particular range of item IDs.
Levels Up	Set to 1 to see just the component's parent assembly. The larger the number, the higher the level; for example, Level 3 is three levels higher in the bill of material structure than the component.

SFS1100 - Production Close Report

The Close Production page includes:

Report Only Mode	Select this check box if you want to run this process the production that can and can't be closed as well as the variances that could be generated as a result of an accounting close.

Note. This option enables you to view the production that can and cannot be closed as well as the reasons why production can't be closed. It also provides a preview of variances for those production IDs or production schedules that can be closed.

Select Production IDs

Select this check box to close production IDs based any of these values:

- Prdn ID (production ID)
- Prdn Area (production area)
- Item ID

All or a Range

Narrow down the production to close by combining any of these options. For example, you can close only those production IDs within a selected production area for a single item.

Select Production Schedules

Select this check box to close production schedules.

Close production schedules based on:

- Prdn Area (production area)
- Item ID

The Close Status Selection page includes:

Current Status

Select one or more of these production statuses:

- Pend Cmpl (pending complete)
- In Process
- Complete
- Clsd/Labor (closed for labor)

Close Production For

Values are:

- Complete
- Clsd/Labor (closed for labor)
- Clsd/Acctg (closed for accounting)

Curr Prdn Due/Close Dates (current production due/close dates)

Enter the appropriate date ranges.

If you're closing any In Process or Pending Complete production, the system closes any production IDs or production schedule quantities whose production due date falls within the date range specified.

If you are closing any production IDs or production schedule quantities whose current status is Complete or Closed for Labor, the system closes any production whose close date falls within the range specified.

Complete with Component Shortages

Select this check box if you want to close production even if you haven't issued all material for the production ID or production schedule

	quantity. In this instance, the quantity issued to production is less than the current scheduled quantity for the component.
Close with Assemblies Remain (close with assemblies remaining)	Select this check box if you want to close production even though the full production quantity hasn't been completed.
Tolerance %	You must indicate a tolerance percentage is you selected the Close with Assemblies Remain check box. Use this field to define what percentage of assemblies can remain uncompleted and still close production with remaining assemblies. For example, if you have a production ID with an order quantity of 100 but have completed only 92 units and enter a tolerance % of 5%, this production ID won't close because the quantity remaining to be completed is 8% of the order quantity. The default is 0%. The system closes any production in process, pending complete, complete, or closed for labor only if the quantity of assemblies completed and scrapped at each operation equals the quantity started at each operation.
Variance Distrib Type (variance distribution type)	Can be used in conjunction with the Transaction Group for variances to define the accounting entries to post the variance to the general ledger. The default distribution type for the transaction group (if one was defined) displays, but you can override the distribution type for each accounting close. This field is optional and used only when closing production for accounting.

Note. If any of the production IDs are for production with one or more subcontracted operations, the system can't close production if the subcontracted purchase order(s) haven't been fully received. To close those production IDs, the material must be received and the subcontracted operation must be recorded as complete.

Warning! The close production process generates several .DAT files and writes them to the C:\TEMP directory. If you are trying to create a Production Close report or run the production close process, and an error message displays indicating permission is denied, you don't have write access to the C:\TEMP directory. See your system administrator to provide write access before running this process again.

SFS1200 - Production Reopen Process Report

Current Status	Select a current production status for the you'd like to reopen.
Curr Prdn Due/Close Dates (current production due/close dates)	Enter the appropriate dates. The system reopens any production IDs or schedules that are currently closed for accounting, labor, or complete and whose accounting or labor close date or completed date falls within the date range specified. When reopening production in the pending complete status, production will be set to In Process if the production due date falls within the date window specified. This process generates the Reopen Production Request report. The report details the before and after status of the production ID or production schedule once the process is complete. You can view the results of the variance postings and the reversal of the posting by running the Production Variance Report.

SFS1500 - Production Variance Report

Variance Posting Date	The dates production was closed for accounting.
Prdn Due Date/Shift	Enter a beginning and end production due date and shift. The Shift field must be between 1 and 3.
Variance Tolerance Amount	Enter the minimum monetary amount on which you want to display report results. By specifying a minimum monetary amount, you can focus in on those production IDs or production areas with significant variances. Enter 0.00 to report all variances for the production selected.

SFS1600 - Potential Production Variance Report

This report includes production selection and potential variance selection.

Production selection includes:

Report Request Parameters	You can either report on production IDs or production schedules by selecting the appropriate check boxes.
Select Production IDs	Select All or a Range of one of these values: • Prdn ID (production ID) • Prdn Area (production area) • Item ID
Select Production Schedules	Select All or a Range of one of these values: • Prdn Area (production area) • Item ID

Potential variance selection includes these options:

Current Production Status	Select any of these statuses: • Pend/Cmpl (pending complete) • Complete • In Process • Clsd/Labor (closed for labor)
Report Variances Above Amount	Enter the lower limit for variances that you want to print on the report. For example, if you enter 100.00 here, only those production IDs and schedules with a variance over 100.00 will be reported. To see variances on all production, enter 0.00. A favorable or unfavorable variance above the specified amount will be reported.

Note. Once the selection criteria has been made and saved, you should schedule the job to run periodically using Process Scheduler. Once the process has completed, an email notification will be sent to the designated role. The email notification will include an attached report, detailing those production IDs and schedules in violation of the specified variance amount.

Note. If you choose not to run this process periodically, you can still submit this process manually.

SFS2001 - Shortage Report

You have the option of creating a shortage report that displays one or both:

- Pending Shortages exist when the pending consumed quantity and/or the pending yield loss quantity is greater than 0. This condition indicates that the component wasn't found in the WIP location or stores location if kitting, or insufficient quantity on hand was found and the full quantity couldn't be issued.
- Production Shortages exist if any of these occurs:

- Type 1 Shortage: A quantity of the component is required for the production but hasn't yet been issued from stock. This type of shortage is only reported if the order or operation start date falls within a user-defined date range. They are shown for Kit or Issue production.

If component issue method = Kit or (component issue method = Issue and quantity Per = Order), then the shortage quantity = current scheduled quantity - issue quantity - minimum (yield quantity, current schedule quantity * (1 - Yield % / 100)).

If component issue method = Issue and quantity per = assembly, then the shortage quantity = (order production quantity - operation completion quantity - operation & previous operation scrap quantity) * Qty Per * 100/Yield %.

- Type 2 Shortage: you have tried to consume or issue more components from the WIP or stores location than were available. The system always reports Type 2 Shortages.

shortage quantity = Pending Consumed Qty + Pending Loss Qty.

Note. If both a Type 1 and a Type 2 shortage exist for the same component/operation and the issue method is Kit or the quantity per is Order, the quantity short shown on the report is the greater of the two. If both a Type 1 and a Type 2 shortage exist for the same component/operation and the issue method is *Issue* and the quantity per is assembly, the quantity short shown on the report is the sum of the two.

- Type 3 Shortage: the quantity in the WIP location is negative. This could be the result of Issue or Replenish production.

shortage quantity = WIP Location Qty On Hand (absolute value).

Note. Type 3 shortages aren't currently shown on the Shortage Report.

SFS2002 - Dispatch List

The Dispatch List details production ID or production schedule information, including operation and task details for each work center or range of work centers. Use this document when you want to see the type and quantity of production that occurs at all work centers or at a particular work center for a particular date or range of dates. In addition, you can generate a dispatch list by production start date and due date, or generate a report that lists production that is past due. You can create your own reports that include this types of information:

- Component information for each work center/operation or a range of work centers.
- Operation start and due dates and times.
- Production operations that are past due.
- Subcontracted operation information.
- Comments at the production and operation level.
- Item substitution information.

Dispatch List Selection:

Print Bar Code	If you select this check box, the system prints bar codes for bar coded fields on the dispatch list.
Print Bar Coded Control Flags	Select this check box to print bar code control flag information. Note. If your reports aren't printing bar codes as requested, check your SETENV.SQC file to make sure your PRINTER_TYPE environmental variable is set correctly.
Work Center Range	Select All if you want to generate a Dispatch List for all work centers. If you're specifying a Range of work centers, select a particular work center in From WC (work center) and To WC (work center).
Dispatch List Date Options	Select one of these values: • <i>Start Date.</i> Indicates the start date of the production. All production IDs and schedules whose start date falls within the date range specified will be included in the report. • <i>Due Date.</i> Indicates the date in which the production is due. All production IDs and production schedules whose due date falls within the date range specified will be included in the report. • <i>Past Due Report:</i> Indicates production that is past due as of the date of the report is run.
From Date and To Date	Enter the date ranges for the dispatch list.
Dispatch List Report Options	Indicates the detailed production information that can be printed on your report. You can select any of these report options: • Print Components • Print Op Time Info (operation time information)

- Print Subcontracted Ops (subcontracted operations)
- Print Comments
- Print Original Components - will display where substitutions have been made.
However, bar codes will not be printed for the original component ID.

Production Selection:

Select Production IDs and Select Production Schedules	Select one or both check boxes to generate a production report for production IDs, production schedules, or a combination of both.
All, Range, Prdn ID (production ID), Prdn Area (production area), or Item IDs	Select values for production IDs.
All, Range, Prdn Area (production areas), or Item IDs	Select values for production schedules.

SFS2003 - Production Documents

Note. Production documents are applicable for production IDs only.

The PID print status options include:

Ready to Print	Print production documents for production IDs with a production document status of <i>Ready for Printing</i> . The Prdn Doc Status displays on the Production ID Maintenance page.
Ready to Print + Reprints	Print production documents for production IDs within the range, with a document status of <i>Ready for Printing</i> and <i>Printed</i> .
Reprints Only	Print production documents for every production ID within the range with a production document status of <i>Printed</i> .
Selection Criteria	Select one or more of these options: • Start Date (actual start date for production ID) • Prdn ID (production ID) • Prdn Area (production area) • Item ID



Click the Item Search button to access the Item Search page to locate a different item.

The report options include:

Sort Option	You can generate the report by:

	• <i>Item</i> • <i>Prdn Area</i> (production area) • <i>Prdn ID</i> (production ID)
Print Attachments or Print Text	Select if you want to print a list of attachments or text for the production ID.
Print Original Components	Select this check box to print the original component ID and description where substitutions have been made. Bar codes, however, won't be printed for the original component ID.
Print Config Detail (print configuration code details)	If you are using PeopleSoft Product Configurator, you can select this check box to include information on configured production.
Print Bar Code	Select this check box to print bar codes for bar coded fields.
Print Bar Coded Control Flags	Select this check box to include bar code control flag information.
Note. If your reports aren't printing bar codes as requested, check your SETENV.SQC file to make sure your PRINTER_TYPE environmental variable is set correctly.	

SFS2004 - Production Report

The Production Report Selection page includes:

Start Date Range	Indicate whether you want to print a production report for All or a Range of dates.
Sort Options	Select one of these values: • <i>Due Date</i> • <i>Item</i> • <i>Prdn Area</i> (production area) • <i>Prdn Due Date</i> (production due date) • <i>Prdn Start Date</i> (production start date) • <i>Start Date</i>
Print Text	Select this check box if you want to include production text for the specified production IDs and production schedules.
Print Output	Select this check box if you want to include production output information for the specified production IDs or production schedules that have multiple outputs.
Select Production Status	You must select at least one status to run the Production Report, and the system selects all statuses as a default. Statuses are: • <i>Entered</i> • <i>Firmed</i> • <i>Released</i>

- *In Process*
- *Pend Complete* (pending complete)
- *Complete*
- *Cancelled*
- *Clsd/Labor* (closed for labor)
- *Clsd/Acctg* (closed to accounting)

The Production Selection page includes:

Select Production IDs and Select Production Schedules	Select one or both check boxes to generate a production report for production IDs, production schedules, or a combination of both.
All, Range, Prdn ID (production ID), Prdn Area (production area), or Item IDs	Select values for production IDs.
All, Range, Prdn Area (production areas), or Item IDs	Select values for production schedules.

SFS2006 - Component Where Used in Production Report

The Component Selection page includes:

All or Range	Select values for the component.
Date Type	Select one of the options: • <i>Prdn Start</i> (production start). Select production based on start dates. • <i>Prdn Due</i> (production due). Select production based on due dates.
All dates or Range of dates	Select an option and enter dates in the fields.
Sort Option	Select an option: • <i>Item</i> • <i>Prdn Area</i> (production area) • <i>Prdn ID</i> (production ID)
Substitutes	Select this check box if you want component substitutes to be printed on the report.
Status Selection	Indicates the production status of the component. Select All Status or Select Range Status. Select one or more of these production statuses: • <i>Firmed</i>

- *Released*
- *In Process*
- *Pend Complete* (pending complete)
- *Complete*
- *Clsd Labor* (closed for labor)
- *Clsd Acctg* (closed for accounting)

The Production Selection page includes:

Select Production IDs and Select Production Schedules	Select one or both check boxes to generate a production report for production IDs, production schedules, or a combination of both.
All, Range, Prdn ID (production IDs), Prdn Area (production area), or Item IDs	Select values for production IDs.
All, Range, Prdn Area (production areas), or Item IDs	Select values for production schedules.

SFS2007 - Production Schedule by Area Report

The Production Schedule by Area Report page includes:

Unit and Production Area	Select values.
From	Enter the Start Date Range in this field for the production area that you'd like to review.

SFS2008 - Subcontracted Purchase Order Report

The Subcontracted Purchase Order Report page includes:

All or Range	Select either option for one of these values: • Op Start Dt (operation start dates) • Prdn ID (production IDs) • Prdn Area (production areas) • Item ID Enter values for the ranges. If you select a range of operation start dates, all purchase orders with production IDs whose subcontracted operations start within the date range specified will be included.
Sort Option	Values are: • <i>Item ID</i>

- *Op St Date* (operation start date)
- *Prdn Area* (production area)
- *Prdn ID* (production ID)

Print Text

Select this check box if you want to print the associated text with the Sort Option.

Production Status

Select any of these values:

- *Firmed*
- *Released*
- *In Process*
- *Pend Complete* (pending complete)
- *Complete*

SFS6000 - Material Picking Plan

The Material Picking Plan page includes:

Production Area Information

The production selection options available on this page depend on the material issue method you chose on the picking options page.

For example, if you select the Kit method on the picking options page, the WIP Location Range for Issues group box items won't be available.

Prdn Areas (production areas)

You can select one of these options when generating picking plans for components using the Issue or Kit method:

All. If you select this option and the issue method you selected is Issue, you can additionally enter a range of WIP locations.

Range. If you select this option, the system looks at all WIP locations for the production selected.

Options for Kits

You can select one of these options when generating picking plans for components using the Kit method:

- All
- Range
- Prdn ID - you can also indicate either All or a Range
- Item ID - you can also indicate either All or a Range

WIP Location Range for Issues

Select All or Range if all production areas use the Issue method. Within the range of storage area, you can further define your selection by any of the 4 location levels set up in your inventory. If you selected a range of production areas, you can't select a range of WIP locations.

Note. If you're selecting consigned kit issue components, including lot- and serial-controlled components, the system picks from *both* owned and non-owned WIP storage locations.

Run

Click to run this request. Process Scheduler runs the Pick Plan process and report (SFS6000) at user-defined intervals.

SFS8000 - Genealogy Exception Report

The Genealogy Exception Report page includes:

Report Request Parameters

Prdn ID (production ID),
Prdn Area (production
area), **Item ID**

Select All or enter a Range of values.

Prdn Status

Select one or more of these production statuses:

- In Process
- Pend Cmpl (pending complete)
- Complete
- Clsd/Labor (closed for labor)
- Clsd/Acctg (closed for accounting)

**Display Prdn if Serial ID
is not Associated with
Assembly Scrap**

Select this check box if you want this information printed on the report.

Sort Option

Select one of these sort options:

- *Item ID*
- *Prdn Area* (production area)
- *Prdn ID* (production ID)

These are exception messages that you may encounter when you generate a Genealogy Exception Report.

***Assembly Exceptions Serial
IDs not associated with
Assembly Scrap***

There is assembly scrap that does not have a serial ID associated with it. If you want to associate serial IDs to the scrap, you will need to reverse the scrap and then rescrap.

***Serial IDs associated >
Completed + Scrap***

There are serial IDs associated with the production ID that have not been completed or scrapped. You should verify that the serial IDs are still in production

***Component serial/lot
association rows do not exist***

There are completed serial assemblies that do not have any serial or lot components associated. You may need to enter your component association transactions.

<i>Component Exceptions Component Issue <> Trace Usage</i>	You have consumed more serial IDs than have been associated with an assembly. You should verify the correct component associations have been recorded.
<i>Component serial/lot association rows do not exist</i>	You have consumed quantity but no component association rows have been recorded. You should verify the correct component associations have been recorded.
<i>Comp List qty per <> Sum of Trace Issue Qty</i>	You have associated more or less quantity than what is scheduled. You should verify the correct component associations have been recorded.

Viewing Standard Financial Reports

You can also view standard financial reports used by PeopleSoft Manufacturing.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “PeopleSoft Application Fundamentals for FIN, ESA, and SCM Reports”.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
KPI	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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PeopleSoft Manufacturing 8.8 Reports

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PeopleSoft Manufacturing 8.8 Reports

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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

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This section discusses how to:

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CHAPTER 1

PeopleSoft Manufacturing Report Descriptions

PeopleSoft applications offer a wide range of query and reporting possibilities. In addition to the standard reports that we deliver, we also provide reporting tools that you can use to create new reports from scratch.

If you purchased any of these PeopleSoft applications in addition to PeopleSoft Manufacturing, you'll find the reports applicable to these applications in their respective PeopleBook:

- PeopleSoft Engineering
- PeopleSoft Flow Production
- PeopleSoft Cost Management
- PeopleSoft Supply Planning

PeopleSoft Manufacturing Reports: General Description

This table lists the PeopleSoft Manufacturing reports. All the reports that are listed are SQR reports. If you need more information about these reports, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
ENS1000 BOM Report	Lists the components on either manufacturing or engineering BOMs.	• Manufacturing Definitions, BOMs and Revisions, Reports, Bills of Material • Engineering, BOMs and Revisions, Reports, Bills of Material, EBOM Report	EN_BOM_REPORT
ENS1001 Routing Report	Lists the routing information for manufacturing or engineering routings.	• Manufacturing Definitions, Resources and Routings, Routings, Routing Report • Engineering, Routings, Engineering Routing Report, Routing Report	RUN_ENS1001

Report ID and Report Name	Description	Navigation	Run Control Page
ENS1002 Compare Routings Report	Lists the differences between two manufacturing routings, two engineering routings, or one manufacturing routing and one engineering routing. Comparisons can also be based on the same item with different routing codes.	- Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison Report, Routing Compare Report - Engineering, Routings, Eng Routing Comparison Report, Routing Compare Report	RUN_ENS1002
ENS1003 Master Routing Where Used Report	Lists all items that reference another item as its master routing along with production data. This report is used in both Manufacturing and Engineering.	- Manufacturing Definitions, Resources and Routings, Routings, Master Rtg Where Used Report - Engineering, Routings, Eng Master Routing Where Used, Master Rtg Where Used Report	RUN_ENS1003
ENS1004 Resources Where Used Report	Lists where resources are used on work centers, tasks, routings, and in production.	Manufacturing Definitions, Resources and Routings, Resources Where Used Report	RUN_ENS1004
ENS1005 Compare BOMs Report	Lists the differences between a manufacturing and an engineering BOM, or two engineering BOMs.	- Manufacturing Definitions, BOMs and Revisions, Reports, BOM Comparison Report, BOM Compare Report - Engineering, BOMs and Revisions, Reports, EBOM Comparison, EBOM Compare Report	EN_BOM_COMP_REPORT
ENS1006 Work Centers Where Used Report	Lists the tasks, routings, and production associated with either a selected work center or a range of work centers within a particular business unit.	Manufacturing Definitions, Tasks and Work Centers, Work Centers Where Used Report	RUN_ENS1006
ENS1007 Tasks Where Used Report	Lists the routings and production associated with either a selected task or a range of tasks within a particular business unit.	Manufacturing Definitions, Tasks and Work Centers, Tasks Where Used Report	RUN_ENS1006B
ENS1010 BOM Cost Report	Lists the component costs on either manufacturing or engineering BOMs.	- Manufacturing Definitions, BOMs and Revisions, Reports, BOM Costed, BOM Costed Report - Engineering, BOMs and Revisions, Reports, EBOM Costed Report	EN_BOM_COST_REPORT

Report ID and Report Name	Description	Navigation	Run Control Page
ENS2000 Item Where Used Report	Lists all the BOMs on which an item appears either as a component or a substitute for a component. You'll find this information useful when you want to analyze the impact component changes can have on all existing BOMs.	- Manufacturing Definitions, BOMs and Revisions, Reports, Item Where Used - Engineering, BOMs and Revisions, Reports, Item Where Used	EN_WHEREUSED_RPT
SFS1100 Production Close Process Report	Lists closed production schedules or production IDs, and details the variances incurred. Combine sort options to narrow down the production close information that is reported. For example, close only those production IDs within a selected production area for a single item. Use the Report Only Mode to view the production that can and can't be closed as well as the variances that can be generated as a result of an accounting close.	Production Control, Close and Analyze Production, Close Production	RUN_SFS1100
SFS1200 Production Reopen Process Report	Lists the before and after status of the production ID or area/item that needs to be reopened. Combining numerous sort options assists in narrowing down the production reopen information that is reported. For example, reopen production only for those production IDs within a selected production area for a single item. Use the Report Only Mode to provide a preview of the financial impact of reopening production without creating reversing entries.	Production Control, Close and Analyze Production, Reopen Production	RUN_SFS1200
SFS1500 Production Variance Report	Lists variances for production IDs or production schedules for a specified production due date/shift and above a minimum monetary amount. Variances include configuration, usage, component yield, lot size, routing process, rework, teardown, production mix variance, and outside processing.	Production Control, Close and Analyze Production, Production Variance Report	RUN_SFS1500

Report ID and Report Name	Description	Navigation	Run Control Page
SFS1600 Potential Production Variance Report	Lists potential production variances that exist in production above a monetary amount, prior to closing for accounting production IDs and schedules. The report can be generated when in a production status of in process, pending complete, complete, and closed for labor. Variances include configuration, usage, component yield, lot size, routing process, rework, teardown, production mix variance, and outside processing.	Production Control, Close and Analyze Production, Potential Prdn Variance Report	RUN_SFS1600
SFS2001 Material Shortage Report	Lists production shortages as well as surplus inventory. Report options include a summary report or a report that ignores surplus quantities.	Production Control, Close and Analyze Production, Shortage Report	RUN_SFS2001
SFS2002 Dispatch List	Lists production ID or production schedule information, including operation and task details for each work center or range of work centers. Use this document to review the type and quantity of production that will be occurring at a particular work center or range of work centers for a specified date or range of dates. Selects production information by production start date or due date, or lists production that is past due. Additional report information includes component information for each work center/operation, operation start and due dates/times, subcontracted operation information, and production and operation level text.	Production Control, Process Production, Release Production, Print Dispatch List	RUN_SFS2002

Report ID and Report Name	Description	Navigation	Run Control Page
SFS2003 Production Documents	Lists the component list, operation list, and work center, resource, and schedule information for a particular production ID. Print production documents for production IDs with a production document status of Ready to Print, reprint production documents, or print production documents for the specified production IDs regardless of the production document print status.	Production Control, Process Production, Release Production, Print Production Documents	RUN_SFS2003
SFS2004 Production Report	Lists all scheduled production for a specified range of actual start dates, production statuses, and production IDs and production schedules. Sort by actual due date, item ID, production area, production due date, or production start date.	Production Control, Define Production, Reports, Production Report	RUN_SFS2004
SFS2005 Efficiency and Utilization Report	Lists variances and utilization by operation, work center, production ID, and production area/item for both labor and machine. Report earned and actual labor by work center with or without the production ID or production schedule detail.	Production Control, Close and Analyze Production, Efficiency and Util Rpt	RUN_SFS2005
SFS2006 Component Where Used in Prdn Report	Lists the production IDs or production schedules where specified components are used in production. This report can be sorted by item ID, production due shift, production start date, or production ID. Also lists substitute information for the component, and can include production with a status of Firmmed, Released, In Process, Pending Complete, Complete, Closed for Labor, and Closed to Accounting.	Production Control, Define Production, Reports, Component Where Used Report	RUN_SFS2006

Report ID and Report Name	Description	Navigation	Run Control Page
SFS2007 Production Schedule by Area Report	Lists total production quantities by item for each calendar day within a 14-day period for each business unit and production area. Includes number of items scheduled for completion for each day. Sort by inventory item and production due date.	Production Control, Define Production, Reports, Schedule by Area Report	RUN_SFS2007
SFS2008 Subcontracted PO Report	Lists purchase orders and PO numbers for subcontracted production IDs with the statuses of Firm, Released, In Process, Pending/Complete and Complete. Sort by production start date of the subcontracted production ID, by the purchase order due date, production area, production item, purchase order number, or purchase order due date.	Production Control, Process Production, Subcontract Production, Subcontracted PO Report	RUN_SFS2008
SFS6000 Material Picking Plan	Generates picking plan instructions for stockroom processing. Lists all items to be picked by location, component, or production ID and production schedule for a specified production start date range. Picking plan options include the PUSH or PULL method.	Production Control, Process Production, Issue Materials, Create Picking Plan	RUN_SFS6000
SFS8000 Genealogy Exception Report	Generate a report that lists those serial production IDs that have genealogy inconsistencies.	Production Control, Process Production, Production Genealogy, Genealogy Exception Report	RUN_SF_TRC001

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

Report ID : EN1000

PeopleSoft Bills and Routings
MFG BILL OF MATERIAL REPORT

Page No. 1
Run Date: 11/24/2003
Run Time: 16:01:01

SELECTION CRITERIA

User ID :	VP1
Run Control ID:	ADHOC
Bus. Unit :	US008
Items Range :	All Items
BOM State :	Manufacturing
BOM Type :	Production
BOM Code :	1
Eff Date/Revision :	All Dates / Revisions
Number of levels Deep :	1
Print Substitutes :	Yes
Print Lower Level Outputs:	Yes
Print Component Dimensions:	Yes
Print Reference Designators:	Yes
Print Component Text:	Yes
Print Component Attachments:	Yes
Print Component Documents:	Yes
Print Assembly Text:	Yes
Print Assembly Attachments:	Yes
Print Assembly Documents:	Yes

PeopleSoft Bills and Routings
MFG BILL OF MATERIAL REPORT

Page No. 2
Run Date: 11/24/2003
Run Time: 16:01:01

Report ID : EN1000
Bus. Unit : US008
Item ID : BR4400
BOM Type : Production
BOM Code : 1
BOM Qty : 1
BOM Descr :
Source CD : Make

					Pri/								Pos		Non				
Lvl	Substitute/ Component ID	Description	Comp Rev	Source Code	Op Seq	Eff Date	Obs Date	Eff Rev	Obs Rev	Quantity	Asy/ UOM	Ord	Nbr	Yield	Sub	Own	Ph	Ser	ECO
1	.FS3000	Bolt		FlrS	10	01/01/1900	12/31/2099			5.0000	EA	ASY	0	100.0	N	N	N	N	
	Size:	Height: 0.0000	Length:		0.0000	Width: 0.0000				Weight: 0.0000				Vol: 0.0000					0.0000
1	.FS3001	Washer		FlrS	10	01/01/1900	12/31/2099			5.0000	EA	ASY	0	100.0	N	N	N	N	
	Size:	Height: 0.0000	Length:		0.0000	Width: 0.0000				Weight: 0.0000				Vol: 0.0000					0.0000
1	.FS3002	Nut		FlrS	10	01/01/1900	12/31/2099			5.0000	EA	ASY	0	100.0	N	N	N	N	
	Size:	Height: 0.0000	Length:		0.0000	Width: 0.0000				Weight: 0.0000				Vol: 0.0000					0.0000
1	.LT5002	Wheel Tire, 700x23		Buy	10	01/01/1900	12/31/2099			1.0000	EA	ASY	0	100.0	N	N	N	N	
	Size:	Height: 28.0000	Length:		0.0000	Width: 0.7500	IN			Weight: 1.0000				LBS Vol: 0.0000					0.0000
1	.WH1001	Wheel Rim, Aero		Buy	20	01/01/1900	12/31/2099			1.0000	EA	ASY	0	100.0	N	N	N	N	
	Size:	Height: 28.0000	Length:		0.0000	Width: 1.0000	IN			Weight: 2.0000				LBS Vol: 0.0000					0.0000
1	.WH1003	Wheel Spokes, Aluminium		Buy	30	01/01/1900	12/31/2099			15.0000	EA	ASY	0	100.0	N	N	N	N	
	Size:	Height: 0.2100	Length:		13.0000	Width: 0.2100	IN			Weight: 5.0000				OZA Vol: 0.5733					CUI
1	.WH1007	Wheel Nipples, Titanium		Buy	30	01/01/1900	12/31/2099			1.0000	EA	ASY	0	100.0	N	N	N	N	
	Size:	Height: 0.5000	Length:		0.5000	Width: 0.5000	IN			Weight: 1.0000				OZA Vol: 0.1250					CUI

PeopleSoft Bills and Routings
Routing Report

Report ID : ENS1001
Business Unit : US008

Page No. 1
Run Date: 11/24/2003
Run Time: 15:48:20

SELECTION CRITERIA

User ID:	VP1		
Run Control ID:	BR_ProcessSweep		
Business Unit :	US008		
Rtg State	Manufacturing		
Rtg Type	Production		
Item ID:	MT2000	Thru	MT2000
Rtg Code	1		
<u>PRINT OPTIONS</u>	All		

PeopleSoft Bills and Routings
Routing Report

Report ID : ENS1001
Business Unit : US008

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Run Date: 11/24/2003
Run Time: 15:48:21

<u>Item ID</u>	<u>Description</u>	<u>Rtg Code</u>	<u>Rtg State</u>	<u>Rtg Type</u>	<u>Copy to Prdn</u>	<u>Copy to Plng</u>	<u>Priority</u>
MT2000	Pro Road Bike, Wmn <u>Header Text</u>	1	Manufacturing	Production	Yes	Yes	1
<u>Header Documents</u>							
<u>Document Name</u>		<u>Fixed</u>	<u>Title</u>				
No data found							
<u>Header Attatchments</u>							
<u>File Ext</u>		<u>Document Name</u>	<u>Description</u>				
No data found							

Operation Sequence Summary

<u>Op Seq</u>	<u>Task Code</u>	<u>Description</u>	<u>Sub</u>	<u>Count Pt</u>	<u>Work Center</u>	<u>Description</u>	<u>Crew Size</u>	<u>Mach. Res.</u>	<u>S/Q</u>	<u>Intensity</u>	<u>Overlap</u>	<u>Op Yield</u>
10	FORK	Add Fork	No	No	FI-ASSY	Final Assembly Work	1	1		Longest Time	No Overlap	100.0000

Routing Resources

<u>Resource Type</u>	<u>Crew/Mach/Tool</u>	<u>Description</u>	<u>Status</u>	<u>Qty Used</u>	<u>Priority</u>
Primary Crew	ASSY01	Assembly Crew 1	Available	0	10
Alt Crew	ASSY02	Assembly Crew 2	Available	0	10
Primary Machine	FINAL01	Final Assembly Equip		0	10

Rtg Time

<u>Time/Resource Type</u>	<u>OP Time/Rate</u>	<u>Time/Rate Unit</u>	<u>Incl Setup</u>
Planning Labor Run	3.00	Minutes	No
Planning Machine Run	3.00	Minutes	No
Costing Labor Run	3.00	Minutes	No
Costing Machine Run	3.00	Minutes	No

Conversion Codes

<u>Conversion Code</u>	<u>Description</u>	<u>Overhead1</u>	<u>Overhead2</u>	<u>Overhead3</u>	<u>Overhead4</u>
4402	Mixing	6501	6505	6506	

PeopleSoft Bills and Routings
Routing Compare Report

Report ID : ENS1002
Business Unit : US008

Page No. 1
Run Date: 11/24/2003
Run Time: 15:47:19

SELECTION CRITERIA

User ID:	VP1
Run Control ID:	BR_ProcessSweep
Business Unit :	US008
Rtg Type	Production
<u>Baseline</u>	<u>RTG1</u>
Rtg State	Manufacturing
Item ID:	LT5000
Rtg Code	1 Thru 1
<u>Target</u>	<u>RTG2</u>
Rtg State	Manufacturing
Item ID:	MT3000
Rtg Code	1

PeopleSoft Bills and Routings
Routing Compare Report

Report ID : ENS1002
Business Unit : US008

Page No. 2
Run Date: 11/24/2003
Run Time: 15:47:20

<u>Routings</u>		<u>Item ID</u>	<u>Description</u>	<u>Rtg State</u>	<u>Rtg Type</u>	<u>Rtg Code</u>
Baseline	RTG1	LT5000	Wheel Subassembly	Manufacturing	Production	1
Target	RTG2	MT3000	Mountain Bike, Womans	Manufacturing	Production	1

Header Detail

<u>Routings</u>	<u>Description</u>	<u>Short Descr</u>	<u>Copy to Prdn</u>	<u>Copy to Plng</u>	<u>Priority</u>
RTG1	Wheel Subassembly Text:	Wheel Assy	Yes	Yes	1
RTG2	Mountain Bike, Womans Text:	Mt Bike Wm	Yes	Yes	1

Header Documents

<u>Differences</u>	<u>Document Name</u>	<u>Fixed</u>	<u>Title</u>

Header Attatchments

<u>Differences</u>	<u>File Ext</u>	<u>Document ID</u>	<u>Description</u>

Operations

<u>Differences</u>	<u>Op Seq</u>	<u>Task Code</u>	<u>Description</u>	<u>Sub</u>	<u>Work Center</u>	<u>Description</u>	<u>Crew Size</u>	<u>Mach. Res.</u>	<u>Intensity</u>	<u>S/Q</u>	<u>Overlap</u>	<u>Ship Ahead</u>	<u>Yield %</u>
Added	50	INSP	In Process Inspectio	No	INSP	In Process Inspectio	1	1	Longest Time		No Overlap	0	100.0000
Changed RTG1	10	WHEEL	Wheel Assembly	No	WHEEL	Wheel Subassembly	4	0	Labor Time		No Overlap	0	100.0000
Changed RTG1	20	INSP	In Process Inspectio	No	INSP	In Process Inspectio	1	1	Longest Time		No Overlap	0	100.0000
Changed RTG1	30	FINAL	Final Assembly	No	FI-ASSY	Final Assembly Work	1	1	Longest Time		No Overlap	0	100.0000
Changed RTG1	40	TEST-S	Testing - Subassembl	No	TEST-SA	Testing Work Center	1	1	Longest Time		No Overlap	0	100.0000
Changed RTG2	10	FORK	Add Fork	No	FI-ASSY	Final Assembly Work	1	1	Longest Time		No Overlap	0	100.0000
Changed RTG2	20	FINAL	Final Assembly	No	FI-ASSY	Final Assembly Work	1	1	Longest Time		No Overlap	0	100.0000
Changed RTG2	30	INSP	In Process Inspectio	No	INSP	In Process Inspectio	1	1	Longest Time		No Overlap	0	100.0000
Changed RTG2	40	SUB-1	Subcontracted Painti	Yes	SUB-1	Paint	1	0	Labor Time		No Overlap	0	100.0000

Subcontractor Detail

<u>Differences</u>	<u>Op Seq</u>	<u>Task Code</u>	<u>Description</u>	<u>Sub</u>	<u>Vendor ID</u>	<u>Vendor Name</u>
Changed RTG1	40	TEST-S	Testing - Subassembl	No		
Changed RTG2	40	SUB-1	Subcontracted Painti	Yes	SCM0000004	ERNIE'S BIKE SHOP

PeopleSoft Bills and Routings
Routing Compare Report

Report ID : ENS1002
Business Unit : US008

Page No. 3
Run Date: 11/24/2003
Run Time: 15:47:20

<u>Routings</u>		<u>Item ID</u>	<u>Description</u>	<u>Rtg State</u>	<u>Rtg Type</u>	<u>Rtg Code</u>
Baseline	RTG1	LT5000	Wheel Subassembly	Manufacturing	Production	1
Target	RTG2	MT3000	Mountain Bike, Womans	Manufacturing	Production	1

Operation Text

<u>Differences</u>	<u>Op Seq</u>	<u>Text</u>
Added	50	
Changed RTG1	10	
Changed RTG1	20	
Changed RTG1	30	
Changed RTG1	40	
Changed RTG2	10	
Changed RTG2	20	
Changed RTG2	30	
Changed RTG2	40	

Conversion Codes

<u>Differences</u>	<u>Op Seq</u>	<u>Conversion Code</u>	<u>Description</u>	<u>Overhead1</u>	<u>Overhead2</u>	<u>Overhead3</u>	<u>Overhead4</u>
Added	50	4406	Quality Assurance	6500	6504	6505	
Changed RTG1	10	4402	Mixing	6501	6506		
Changed RTG1	20	4406	Quality Assurance	6500	6504	6505	
Changed RTG1	30	4402	Mixing	6501	6505	6506	
Changed RTG1	40	4401	Technical	6502	6505	6506	
Changed RTG2	10	4402	Mixing	6501	6505	6506	
Changed RTG2	20	4402	Mixing	6501	6505	6506	
Changed RTG2	30	4406	Quality Assurance	6500	6504	6505	
Changed RTG2	40	4403	Cooking				

Routing Resources

<u>Differences</u>	<u>Op Seq</u>	<u>Resource Type</u>	<u>Crew/Mach/Tool</u>	<u>Description</u>	<u>Status</u>	<u>Qty Used</u>	<u>Priority</u>
Deleted CC	40	Primary Crew	TEST02	Testing Crew 2	Available	0	10
Deleted MC	40	Primary Machine	TEST02	Testing Equipment 2		0	10
Added CC	50	Primary Crew	INSP01	Inspection Team	Available	0	10
Added MC	50	Primary Machine	AUTOINSP	Automated Inspection		0	10

PeopleSoft Bills and Routings
Routing Compare Report

Report ID : ENS1002
Business Unit : US008

Page No. 4
Run Date: 11/24/2003
Run Time: 15:47:20

<u>Routings</u>		<u>Item ID</u>	<u>Description</u>	<u>Rtg State</u>	<u>Rtg Type</u>	<u>Rtg Code</u>
Baseline	RTG1	LT5000	Wheel Subassembly	Manufacturing	Production	1
Target	RTG2	MT3000	Mountain Bike, Womans	Manufacturing	Production	1

<u>Rtg Time</u>						
<u>Differences</u>	<u>Op Seq</u>	<u>Time/Resource Type</u>	<u>OP Time/Rate</u>	<u>Time/Rate Unit</u>	<u>Incl Setup</u>	
Added	50	Planning Labor Run	100.00	Units per Hour	No	
Added	50	Planning Machine Run	400.00	Units per Hour	No	
Added	50	Costing Labor Run	100.00	Units per Hour	No	
Added	50	Costing Machine Run	400.00	Units per Hour	No	
Changed RTG1	20	Planning Labor Run	100.00	Units per Hour	No	
Changed RTG1	20	Planning Machine Run	400.00	Units per Hour	No	
Changed RTG1	20	Costing Labor Run	100.00	Units per Hour	No	
Changed RTG1	20	Costing Machine Run	400.00	Units per Hour	No	
Changed RTG1	30	Planning Labor Run	15.00	Minutes	No	
Changed RTG1	30	Planning Machine Run	15.00	Minutes	No	
Changed RTG1	30	Costing Labor Run	15.00	Minutes	No	
Changed RTG1	30	Costing Machine Run	15.00	Minutes	No	
Changed RTG1	40	Planning Labor Run	6.00	Minutes	No	
Changed RTG1	40	Costing Labor Run	6.00	Minutes	No	
Changed RTG2	20	Planning Labor Run	15.00	Minutes	No	
Changed RTG2	20	Planning Machine Run	15.00	Minutes	No	
Changed RTG2	20	Costing Labor Run	15.00	Minutes	No	
Changed RTG2	20	Costing Machine Run	15.00	Minutes	No	
Changed RTG2	30	Planning Labor Run	100.00	Units per Hour	No	
Changed RTG2	30	Planning Machine Run	400.00	Units per Hour	No	
Changed RTG2	30	Costing Labor Run	100.00	Units per Hour	No	
Changed RTG2	30	Costing Machine Run	400.00	Units per Hour	No	
Changed RTG2	40	Planning Labor Run	200.00	Units per Hour	No	
Changed RTG2	40	Costing Labor Run	200.00	Units per Hour	No	

PeopleSoft Bills and Routings
Master Routing Where Used Report

Report ID : ENS1003
Business Unit : US008

Page No. 1
Run Date: 11/24/2003
Run Time: 15:46:18

SELECTION CRITERIA

User ID: VP1
Run Control ID: BR_ProcessSweep
Business Unit : US008
Routing State: Manufacturing
Routing Type: Production
Item ID: SR1001 Thru SR1001

Print Production Details: No

PeopleSoft Bills and Routings
Master Routing Where Used Report

Report ID : ENS1003
Business Unit : US008

Page No. 2
Run Date: 11/24/2003
Run Time: 15:46:19

<u>Ref Rtg Item</u>	<u>Description</u>	<u>Uom</u>	<u>Planner Cd</u>	<u>Lot Control</u>	<u>Serial Control</u>	<u>Revision Control</u>	<u>Routing Code</u>
SR1001	Serial Item	EA	AW	No	Yes	Yes	0
<u>Item ID</u>	<u>Description</u>						
LT5010	Custom Road Bicycle						
LT5011	Custom Road Bicycle Wheel						
SR1002	Carrera 6000 Hi Performance Ro						
SR1003	Mt. Whitney 3000 Mountain Bike						
SR1301	Denali 500 Touring Bike						
SR3001	Diablo 500 Touring Bike						

End of Report

PeopleSoft Production Management
Manufacturing Resources Where Used Report

Report ID : ENS1004
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 1
Run Date: 11/24/2003
Run Time: 15:38:37

SELECTION CRITERIA

User ID: VP1

Run Control ID: BR_ProcessSweep

Business Unit : US008

Crew Name: Range: ASSY01 to ASSY05

Machine Code: Range: BRAKE01 to GEAR01

Tool ID: All

Print Option Selected: Print All Usages: Work Centers Tasks Routings Production

PeopleSoft Production Management
Manufacturing Resources Where Used Report

Report ID : ENS1004
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 2
Run Date: 11/24/2003
Run Time: 15:38:37

<u>Crew Code</u>	<u>Description</u>	<u>Crew Size</u>	<u>Status</u>	<u>Planning Option</u>	<u>Planning Bucket</u>	<u>Bucket Strategy</u>	<u>Repair Option</u>	<u>Available Percent</u>	<u>Calendar Code</u>
ASSY01	Assembly Crew 1	1	Available	Detail	Weekly	Proportion	Repair	0	

<u>Work Centers</u>	<u>Type</u>	<u>Work Center</u>	<u>Description</u>	<u>Department</u>	<u>Crew Size</u>
	Alt Crew	BR-ASSY	Brake Assembly Work Center	54000	1
	Primary Crew	FI-ASSY	Final Assembly Work Center	54000	1

<u>Tasks</u>	<u>Type</u>	<u>Task Code</u>	<u>Description</u>	<u>Work Center</u>	<u>Crew Size</u>
	Alt Crew	BRAKE	Brake Assembly	BR-ASSY	1
	Primary Crew	FINAL	Final Assembly	FI-ASSY	1
	Primary Crew	FORK	Add Fork	FI-ASSY	1

<u>Routings</u>	<u>Type</u>	<u>Item</u>	<u>Description</u>	<u>Routing State</u>	<u>Routing Type</u>	<u>Rtg Code</u>	<u>Op Seq</u>
	Primary Crew	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	1	10
	Primary Crew	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	1	20
	Primary Crew	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	2	30
	Primary Crew	HB7100	Hub Subassembly	Manufacturing	Production	1	50
	Primary Crew	HB7300	Hub Subassembly	Manufacturing	Production	1	50
	Primary Crew	LT5000	Lot Item	Engineering	Production	1	30
	Primary Crew	LT5000	Lot Item	Manufacturing	Production	1	30
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	10
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	30
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	31
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	32
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	33
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	34
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	35
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	36
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	37
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	38
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	39
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	10
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	30
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	31
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	32
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	33
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	34
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	35
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	36
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	37
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	38
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	39
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	10
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	30
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	31
	Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	32

PeopleSoft Production Management
Manufacturing Resources Where Used Report

Page No. 3
Run Date: 11/24/2003
Run Time: 15:38:37

Report ID : ENS1004
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production
Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production
Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production
Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production
Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production
Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production
Primary Crew	LT5020	Make-To-Order Bike Package	Manufacturing	Production
Primary Crew	MT2000	Standard Item	Engineering	Production
Primary Crew	MT2000	Standard Item	Engineering	Production
Primary Crew	MT2000	Standard Item	Manufacturing	Production
Primary Crew	MT2000	Standard Item	Manufacturing	Production
Primary Crew	MT2000	Standard Item	Manufacturing	Rework
Primary Crew	MT3000	Mountain Bike, Womans	Engineering	Production
Primary Crew	MT3000	Mountain Bike, Womans	Engineering	Production
Primary Crew	MT3000	Mountain Bike, Womans	Manufacturing	Production
Primary Crew	MT3000	Mountain Bike, Womans	Manufacturing	Production
Primary Crew	MT3000	Mountain Bike, Womans	Manufacturing	Rework
Primary Crew	SR1001	6600 BTU Room Air (Light Beige	Manufacturing	Production
Primary Crew	SR1001	6600 BTU Room Air (Light Beige	Manufacturing	Production
Primary Crew	SR1001	6600 BTU Room Air (Light Beige	Manufacturing	Production
Primary Crew	SR1001	6600 BTU Room Air (Light Beige	Manufacturing	Production
Primary Crew	SR1001	6600 BTU Room Air (Light Beige	Manufacturing	Production
Primary Crew	SR1001	6600 BTU Room Air (Light Beige	Manufacturing	Production
Primary Crew	SR1001	Serial Item	Manufacturing	Production
Primary Crew	SR1001	Serial Item	Manufacturing	Production
Primary Crew	SR1001	Serial Item	Manufacturing	Production
Primary Crew	SR1001	Serial Item	Manufacturing	Production
Primary Crew	SR1001	Serial Item	Manufacturing	Production
Primary Crew	SR1001	Serial Item	Manufacturing	Production
Alt Crew	SR2100	Serial Item	Manufacturing	Production
Alt Crew	SR2300	Brake Subassembly	Manufacturing	Production

<u>Production ID</u>	<u>Type</u>	<u>Prodctn ID</u>	<u>Area</u>	<u>Item</u>	<u>Status</u>	<u>Rtg Code</u>	<u>Op Seq</u>	<u>Start Date</u>	<u>Start Time</u>	<u>Due Date</u>	<u>Due Time</u>
Crew	A	FINAL	MT2000	Pend Cmpl	1	10	09/16/2003	07:00	09/16/2003	07:03	
Crew	A	FINAL	MT2000	Pend Cmpl	1	20	09/16/2003	07:03	09/16/2003	07:18	
Crew	BPF01	BPF01	MT2000	Released	1	10	02/12/2002	14:00	02/12/2002	14:30	
Crew	BPF01	BPF01	MT2000	Released	1	20	02/12/2002	14:30	02/12/2002	17:00	
Crew	BPF03	BPF03	MT3000	Released	1	10	02/12/2002	14:00	02/12/2002	14:30	
Crew	BPF03	BPF03	MT3000	Released	1	20	02/12/2002	14:30	02/12/2002	17:00	
Crew	BPF07	BPF07	BR4400	Released	1	10	05/19/2003	14:00	05/19/2003	14:30	
Crew	BPF07	BPF07	BR4400	Released	1	20	05/19/2003	14:30	05/19/2003	17:00	
Crew	PRD00083	FINAL	MT3000	In Process	1	10	07/27/2000	17:30	07/28/2000	11:30	
Crew	PRD00083	FINAL	MT3000	In Process	1	20	07/28/2000	11:30	08/02/2000	13:30	
Crew	PRD00084	FINAL	MT3000	Released	1	10	08/28/2000	22:30	08/29/2000	11:30	
Crew	PRD00084	FINAL	MT3000	Released	1	20	08/29/2000	11:30	08/30/2000	20:30	
Crew	PRD00121	FINAL	MT2000	Pend Cmpl	1	10	07/28/2000	14:00	07/28/2000	15:15	
Crew	PRD00121	FINAL	MT2000	Pend Cmpl	1	20	07/28/2000	15:15	07/28/2000	21:30	
Crew	PRD00122	FINAL	SR1001	In Process	1	10	07/28/2000	20:00	07/31/2000	09:00	

Report ID : ENS1005

PeopleSoft Bills and Routings
MFG BILL OF MATERIALS COMPARE REPORT

Page No. 1
Run Date: 11/24/2003
Run Time: 15:41:27

SELECTION CRITERIA

User ID:	VP1
Run Control ID:	BR_ProcessSweep
Business Unit :	US008
Type	Production
<u>Baseline</u>	<u>BOM1</u>
BOM State	Manufacturing
Item ID:	MT3000
BOM Code	1.00 Thru 1.00
<u>Target</u>	<u>BOM2</u>
BOM State	Manufacturing
Item ID:	SR1001
BOM Code	1.00

PeopleSoft Bills and Routings
MFG BILL OF MATERIALS COMPARE REPORT

Report ID : ENS1005

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Run Date: 11/24/2003
Run Time: 15:41:27

Bus. Unit : US008

<u>BOM</u>		<u>Item ID</u>	<u>Description</u>	<u>BOM State</u>	<u>BOM Type</u>	<u>BOM Code</u>
Baseline	BOM1	MT3000	Mountain Bike, Womans	Manufacturing	Production	1
Target	BOM2	SR1001	Serial Item	Manufacturing	Production	1

Component Operations Sequence

<u>Differences</u>	<u>Component ID</u>	<u>Description</u>	<u>Comp Rev</u>	<u>OP Seq</u>	<u>Eff Date</u>	<u>Obs Date</u>	<u>Teardown</u>	<u>Yield</u>	<u>Pos Nbr</u>	<u>Non Own</u>	<u>Sub Supply</u>	<u>UOM</u>	<u>Qty</u>	<u>Per</u>	<u>Subs Exist</u>	<u>Serial Control</u>
Deleted	FR7002	Bike Frame, Aluminium	BB	10	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	1	Assembly	No	No
Deleted	FR7005	Front Fork		10	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	1	Assembly	No	No
Deleted	FR7012	Primer Paint		40	01/01/1985	12/31/2099	Yes	100.0 0		No	No	GAL	0.5	Assembly	No	No
Deleted	FS3000	Bolt		10	01/01/1985	12/31/2099	No	100.0 0		No	No	EA	10	Assembly	No	No
Deleted	FS3001	Washer	BB	10	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	10	Assembly	No	No
Deleted	FS3002	Nut		10	01/01/1985	12/31/2099	No	100.0 0		No	No	EA	10	Assembly	No	No
Deleted	HB9001	Handlebar, Mountain		40	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	1	Assembly	No	No
Deleted	LT3008	White Paint		40	01/01/1985	12/31/2099	Yes	100.0 0		No	No	GAL	1	Assembly	No	No
Deleted	LT5000	Lot Item		30	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	1	Assembly	No	No
Deleted	PS1002	Pedal, Standard		50	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	2	Assembly	No	No
Deleted	SR2001	Ship Serial Item		30	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	1	Assembly	No	No
Deleted	SR2100	Serial Item		50	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	1	Assembly	No	Yes
Deleted	ST8004	Gelflex Seat, Womans		50	01/01/1985	12/31/2099	Yes	100.0 0		No	No	EA	1	Assembly	No	No
Added	FR7002	Bike Frame, Aluminium		10	01/01/1900	12/31/2099	No	100.0 0		No	No	EA	1	Assembly	No	No
Added	FR7005	Front Fork		10	01/01/1900	12/31/2099	No	100.0 0		No	No	EA	1	Assembly	No	No
Added	FR7012	Primer Paint		20	01/01/1900	12/31/2099	No	100.0 0		No	No	GAL	1	Assembly	No	No
Added	HB9002	Handlebar, Touring		30	01/01/1900	12/31/2099	No	100.0 0		No	No	EA	1	Assembly	No	No
Added	LT3007	Red Paint		20	01/01/1900	12/31/2099	No	100.0 0		No	No	GAL	1	Assembly	No	No
Added	LT5000	Lot Item		30	01/01/1900	12/31/2099	No	100.0 0		No	No	EA	2	Assembly	No	No
Added	PS1003	Pedal, Clipless		30	01/01/1900	12/31/2099	Yes	100.0 0		No	No	EA	2	Assembly	No	No
Added	SR2001	Ship Serial Item		30	01/01/1900	12/31/2099	No	100.0 0		No	No	EA	1	Assembly	No	No
Added	SR2100	Serial Item		30	01/01/1900	12/31/2099	No	100.0 0		No	No	EA	1	Assembly	No	Yes
Added	ST8001	Bike Seat, Comfort		30	01/01/1900	12/31/2099	No	100.0 0		No	No	EA	1	Assembly	No	No

PeopleSoft Bills and Routings
MFG BILL OF MATERIALS COMPARE REPORT

Page No. 4
Run Date: 11/24/2003
Run Time: 15:41:27

Report ID : ENS1005
Bus. Unit : US008

<u>BOM</u>		<u>Item ID</u>	<u>Description</u>	<u>BOM State</u>	<u>BOM Type</u>	<u>BOM Code</u>
Baseline	BOM1	MT3000	Mountain Bike, Womans	Manufacturing	Production	1
Target	BOM2	SR1001	Serial Item	Manufacturing	Production	1

Outputs (Top Level)

<u>Differences</u>	<u>Output Item ID</u>	<u>Description</u>	<u>OP</u> <u>Seq</u>	<u>Eff Date</u>	<u>Obs Date</u>	<u>Type</u>	<u>Qty</u>	<u>Per</u>	<u>Std UOM</u>	<u>Res%</u>	<u>Cost%</u>	<u>Serial</u> <u>Control</u>
Deleted	MT3000	Mountain Bike, Woman	0	01/01/1900	12/31/2099	Primary Item	1	Assembly	EA	100	100	No
Added	SR1001	Serial Item	0	01/01/1900	12/31/2099	Primary Item	1	Assembly	EA	100	100	Yes

Assembly Header

<u>BOM</u>	<u>Description</u>	<u>Short Descr</u>	<u>Text</u>
BOM1	Mt Bike, Woman's	Mt Bike, W	
BOM2	Omega 500 Prod BOM	Omega 500	

Assembly Documents

<u>Differences</u>	<u>Document Name</u>	<u>Title</u>	<u>Fixed</u>

Assembly Attatchments

<u>Differences</u>	<u>File Ext</u>	<u>Document ID</u>	<u>Description</u>

PeopleSoft Production Management
Work Center Where Used Report

Report ID : ENS1006
Business Unit : US008

Page No. 1
Run Date: 11/24/2003
Run Time: 15:40:24

SELECTION CRITERIA

User ID: VP1
Run Control ID: BR_ProcessSweep
Business Unit : US008
Work Center Range : All
Report Selections: Print Tasks: Yes
Print Routings: Yes
Print Production: Yes

**PeopleSoft Production Management
Work Center Where Used Report**

Report ID : ENS1006
Business Unit : US008

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<u>Work Center / Description</u>	<u>Work Center Location</u>	<u>Dept</u>	<u>AVG Daily Hrs</u>	<u>Resource Class</u>	<u>Bucket Size</u>	<u>Allocation Strategy</u>	<u>Calendar code</u>
FI-ASSY--Final Assy		54000	16.00	Time		Proportional	

<u>Tasks</u>	<u>Task Code / Description</u>	<u>Subcontracted</u>	<u>Count Pt</u>
	FINAL--Final Assembly	No	No
	FORK--Add Fork	No	No

<u>Routings</u>	<u>Item ID</u>	<u>Description</u>	<u>Rtg State</u>	<u>Rtg Type</u>	<u>Rtg Code</u>	<u>Op Seq</u>
	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	1	20
	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	1	10
	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	2	30
	HB7100	Hub Subassembly	Manufacturing	Production	1	50
	HB7300	Hub Subassembly	Manufacturing	Production	1	50
	LT5000	Lot Item	Engineering	Production	1	30
	LT5000	Lot Item	Manufacturing	Production	1	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	39
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	32
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	10
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	31
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	33
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	38
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	36
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	35
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	34
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	37
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	39
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	32
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	10
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	31
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	33
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	38
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	36
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	35
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	34
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	37
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	39
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	37
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	10
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	31
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	32
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	33

**PeopleSoft Production Management
Work Center Where Used Report**

Report ID : ENS1006
Business Unit : US008

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LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	34
LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	35
LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	36
LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	38
MT2000	Standard Item	Engineering	Production	1	20
MT2000	Standard Item	Engineering	Production	1	10
MT2000	Standard Item	Manufacturing	Production	1	20
MT2000	Standard Item	Manufacturing	Production	1	10
MT2000	Standard Item	Manufacturing	Rework	1	30
MT3000	Mountain Bike, Womans	Engineering	Production	1	20
MT3000	Mountain Bike, Womans	Engineering	Production	1	10
MT3000	Mountain Bike, Womans	Manufacturing	Production	1	20
MT3000	Mountain Bike, Womans	Manufacturing	Production	1	10
MT3000	Mountain Bike, Womans	Manufacturing	Rework	1	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	1	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	1	10
SR1001	Serial Item	Manufacturing	Production	1	10
SR1001	Serial Item	Manufacturing	Production	1	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	2	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	2	10
SR1001	Serial Item	Manufacturing	Production	2	10
SR1001	Serial Item	Manufacturing	Production	2	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	3	30
SR1001	Serial Item	Manufacturing	Production	3	30
SR1001	Serial Item	Manufacturing	Production	3	10
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	3	10

<u>Production</u>	<u>Prdn ID</u>	<u>Prdn Area</u>	<u>Item ID</u>	<u>Status</u>	<u>Op Seq</u>	<u>Start Date</u>	<u>Start Time</u>	<u>Due Date</u>	<u>Due Time</u>
	A	FINAL	MT2000	Pending Complete	10	09/16/2003	07:00:00	09/16/2003	08:20:00
	A	FINAL	MT2000	Pending Complete	20	09/16/2003	07:00:00	09/16/2003	08:20:00
	BPF01	BPF01	MT2000	Released	10	02/12/2002	14:00:00	02/12/2002	20:42:00
	BPF01	BPF01	MT2000	Released	20	02/12/2002	14:00:00	02/12/2002	20:42:00
	BPF03	BPF03	MT3000	Released	10	02/12/2002	14:00:00	02/12/2002	19:45:00
	BPF03	BPF03	MT3000	Released	20	02/12/2002	14:00:00	02/12/2002	19:45:00
	BPF07	BPF07	BR4400	Released	10	05/19/2003	14:00:00	05/19/2003	20:42:00
	BPF07	BPF07	BR4400	Released	20	05/19/2003	14:00:00	05/19/2003	20:42:00
	PRD00083	FINAL	MT3000	In Process	10	07/27/2000	17:30:00	08/02/2000	18:30:00
	PRD00083	FINAL	MT3000	In Process	20	07/27/2000	17:30:00	08/02/2000	18:30:00
	PRD00084	FINAL	MT3000	Released	10	08/28/2000	22:30:00	08/30/2000	23:00:00
	PRD00084	FINAL	MT3000	Released	20	08/28/2000	22:30:00	08/30/2000	23:00:00
	PRD00121	FINAL	MT2000	Pending Complete	10	07/28/2000	14:00:00	07/28/2000	23:00:00
	PRD00121	FINAL	MT2000	Pending Complete	20	07/28/2000	14:00:00	07/28/2000	23:00:00
	PRD00122	FINAL	SR1001	In Process	10	07/28/2000	20:00:00	08/02/2000	23:00:00
	PRD00122	FINAL	SR1001	In Process	30	07/28/2000	20:00:00	08/02/2000	23:00:00
	PRD00123	FINAL	SR1001	In Process	10	08/01/2000	20:36:00	08/02/2000	13:06:00

PeopleSoft Production Management
Tasks Where Used Report

Report ID : ENS1007
Business Unit : US008

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Run Date: 11/24/2003
Run Time: 15:39:38

SELECTION CRITERIA

User ID: VP1
Run Control ID: BR_ProcessSweep
Business Unit : US008
Task Range: All
Report Selections: Print Routings: Yes
Print Production: Yes

**PeopleSoft Production Management
Tasks Where Used Report**

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<u>Task Code / Description</u>	<u>Task Intensity</u>	<u>Machine Resources</u>	<u>Crew Size</u>	<u>Subcontracted</u>	<u>Count</u>	<u>Pt</u>
FINAL--Final Assy	2	1	1	No	No	

<u>Routings</u>	<u>Item ID</u>	<u>Description</u>	<u>Rtg State</u>	<u>Rtg Type</u>	<u>Rtg Code</u>	<u>Op Seq</u>
	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	1	20
	BR4400	Yoke, Brake Subassembly	Manufacturing	Production	2	30
	HB7100	Hub Subassembly	Manufacturing	Production	1	50
	HB7300	Hub Subassembly	Manufacturing	Production	1	50
	LT5000	Lot Item	Engineering	Production	1	30
	LT5000	Lot Item	Manufacturing	Production	1	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	39
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	34
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	32
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	31
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	33
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	35
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	38
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	37
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	1	36
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	39
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	34
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	32
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	31
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	33
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	35
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	38
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	37
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	2	36
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	39
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	35
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	33
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	30
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	31
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	32
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	34
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	36
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	38
	LT5020	Make-To-Order Bike Package	Manufacturing	Production	3	37
	MT2000	Standard Item	Engineering	Production	1	20
	MT2000	Standard Item	Manufacturing	Production	1	20
	MT2000	Standard Item	Manufacturing	Rework	1	30
	MT3000	Mountain Bike, Womans	Engineering	Production	1	20

**PeopleSoft Production Management
Tasks Where Used Report**

Report ID : ENS1007
Business Unit : US008

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MT3000	Mountain Bike, Womans	Manufacturing	Production	1	20
MT3000	Mountain Bike, Womans	Manufacturing	Rework	1	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	1	30
SR1001	Serial Item	Manufacturing	Production	1	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	2	30
SR1001	Serial Item	Manufacturing	Production	2	30
SR1001	6600 BTU Room Air (Light Beige)	Manufacturing	Production	3	30
SR1001	Serial Item	Manufacturing	Production	3	30

<u>Production</u>	<u>Prdn ID</u>	<u>Prdn Area</u>	<u>Item ID</u>	<u>Status</u>	<u>Op Seq</u>	<u>Start Date</u>	<u>Start Time</u>	<u>Due Date</u>	<u>Due Time</u>
	A	FINAL	MT2000	Pending Complete	20	09/16/2003	07:00:00	09/16/2003	08:20:00
	BPF01	BPF01	MT2000	Released	20	02/12/2002	14:00:00	02/12/2002	20:42:00
	BPF03	BPF03	MT3000	Released	20	02/12/2002	14:00:00	02/12/2002	19:45:00
	BPF07	BPF07	BR4400	Released	20	05/19/2003	14:00:00	05/19/2003	20:42:00
	PRD00083	FINAL	MT3000	In Process	20	07/27/2000	17:30:00	08/02/2000	18:30:00
	PRD00084	FINAL	MT3000	Released	20	08/28/2000	22:30:00	08/30/2000	23:00:00
	PRD00121	FINAL	MT2000	Pending Complete	20	07/28/2000	14:00:00	07/28/2000	23:00:00
	PRD00122	FINAL	SR1001	In Process	30	07/28/2000	20:00:00	08/02/2000	23:00:00
	PRD00123	FINAL	SR1001	In Process	30	08/01/2000	20:36:00	08/02/2000	13:06:00
	PRD00124	FINAL	SR1001	Released	30	08/02/2000	12:30:00	08/03/2000	22:30:00
	PRD00126	FINAL	SR1002	In Process	30	07/26/2000	16:30:00	07/28/2000	23:00:00
	PRD00127	FINAL	SR1002	In Process	30	07/25/2000	20:00:00	07/28/2000	23:00:00
	PRD00128	FINAL	SR1002	In Process	30	07/28/2000	21:30:00	08/02/2000	09:30:00
	PRD00138	FINAL	SR1003	In Process	30	07/25/2000	20:00:00	07/28/2000	23:00:00
	PRD00144	FINAL	SR1003	In Process	30	07/25/2000	20:00:00	07/28/2000	23:00:00
	PRD00147	FINAL	SR1003	Released	30	07/26/2000	16:30:00	07/28/2000	23:00:00
	PRD00206	CUSTOM	LT5010	Released	30	08/07/2000	21:30:00	08/07/2000	23:00:00
	PRD00207	CUSTOM	LT5011	Released	30	08/07/2000	22:00:00	08/07/2000	23:00:00
	PRD00208	CUSTOM	LT5010	Released	30	08/07/2000	21:30:00	08/07/2000	23:00:00
	PRD00210	REWORK	MT2000	Released	30	09/01/2000	07:00:00	09/01/2000	11:36:00
	PRD00211	REWORK	MT3000	In Process	30	09/05/2000	07:00:00	09/05/2000	11:36:00
	PRD00220	FINAL	SR1001	In Process	30	08/01/2000	22:06:00	08/02/2000	13:06:00
	PRD00222	FINAL	SR3001	In Process	30	10/29/2003	17:00:00	10/29/2003	23:00:00
	PRD00228	CUSTOM	LT5010	Completed	30	11/20/2003	11:08:00	11/20/2003	13:38:34
	PRD00229	CUSTOM	LT5010	Completed	30	11/20/2003	10:08:00	11/20/2003	13:38:34
	PRD00230	CUSTOM	LT5010	Completed	30	11/20/2003	08:38:00	11/20/2003	13:38:34
	PRD00231	CUSTOM	LT5010	Completed	30	11/20/2003	10:08:00	11/20/2003	13:38:34
	PRD00232	CUSTOM	LT5010	Completed	30	11/19/2003	12:38:00	11/20/2003	13:38:34
	PRD00233	CUSTOM	LT5010	Completed	30	11/20/2003	10:08:00	11/20/2003	13:38:34
	PRD00234	CUSTOM	LT5010	Completed	30	11/20/2003	11:04:00	11/20/2003	14:34:40
	PRD00235	CUSTOM	LT5010	Completed	30	11/18/2003	21:34:00	11/20/2003	14:34:40
	PRD00236	CUSTOM	LT5010	Completed	30	11/20/2003	11:04:00	11/20/2003	14:34:40
	PRD00237	CUSTOM	LT5010	Completed	30	11/19/2003	19:34:00	11/20/2003	14:34:40
	PRD00238	CUSTOM	LT5010	Completed	30	11/20/2003	11:04:00	11/20/2003	14:34:40
	PRD00239	CUSTOM	LT5010	Completed	30	11/19/2003	14:34:00	11/20/2003	14:34:40

Report ID : ENS1010

PeopleSoft Bills and Routings
BOM COSTED REPORT

Page No. 1
Run Date: 11/24/2003
Run Time: 15:42:28

SELECTION CRITERIA

User ID :	VP1
Run Control ID:	BR_ProcessSweep
Bus. Unit :	US008
Items Range :	All Items
Cost Type :	CUR
Cost Version :	REV2
BOM State :	Manufacturing
Bom Code :	1
Routing Code :	1
Eff Date :	11/24/2003
Cost as Batch :	Y
Print Lower Level Outputs :	Y
Number of levels Deep :	10

PeopleSoft Bills and Routings
BOM COSTED REPORT

Report ID : ENS1010

Page No. 4
Run Date: 11/24/2003
Run Time: 15:42:28

Bus. Unit : US008
Item ID : HB7100
BOM Code : 1 Routing Code : 1
BOM Qty : 1.00
Cost as Batch : N

Lvl	Type	Component ID	Description	Source Code	Op Seq	Costed Req Qty	UOM	Asy/ Ord	Yield	Extended Cost
1	Component	.HB7101	Lever Cone	Buy	10	1.0000	EA	ASY	100.00	0.6458
1	Component	.HB7102	Ball Retainer	Buy	10	1.0000	EA	ASY	100.00	0.1001
1	Component	.HB7103	Brake Shell	Buy	10	1.0000	EA	ASY	100.00	0.2603
1	Component	.HB7105	Compression Spring Subassembly	Make	20	1.0000	EA	ASY	100.00	0.0000
2	Component	..HB7106	Long Compression Spring	Make	20	1.0000	EA	ASY	100.00	0.0000
3	Component	...HB7107	Guide Pin	Buy	10	1.0000	EA	ASY	100.00	0.0370
3	Component	...HB7108	Thrust Block	Buy	10	1.0000	EA	ASY	100.00	0.0645
2	Component	..HB7108	Thrust Block	Buy	20	1.0000	EA	ASY	100.00	0.0645
2	Component	..HB7109	Short Compression Spring	Buy	30	1.0000	EA	ASY	100.00	0.0535
1	Component	.HB7110	Dust Cap	Buy	30	1.0000	EA	ASY	100.00	0.2095

Total Component Cost: 28.1856

Output Costs:

Type	Output Item/ Description	Associated Primary BOM	Cost %	Output Quantity	UOM	Asy/ Ord	Item Cost Version Cost	Item Report Cost	Delta
Primary	HB7100 Hub Subassembly	HB7100	100	1.0000	EA	ASY	28.1856	28.1856	0.0000

PeopleSoft Bills and Routings
BOM COSTED REPORT

Page No. 5
Run Date: 11/24/2003
Run Time: 15:42:28

Report ID : ENS1010

Bus. Unit : US008
Item ID : HB7100
BOM Code : 1 Routing Code : 1
BOM Qty : 1.00
Cost as Batch : N

Item Cost by Version

<u>Output Item ID</u>	<u>Cost Element</u>	<u>Description</u>	<u>This Level</u>	<u>Lower Level</u>	<u>Total Item Output Cost</u>
HB7100	101	Material - Gears	0.0000	0.6707	
	200	Material Overhead	0.0000	0.3145	
	300	Set Up Labor	0.0250	0.0000	
	301	Run Labor	1.9025	0.0000	
	401	Run Machine	12.3250	0.0000	
	500	Overhead - Labor Based	3.5429	0.0000	
	502	Overhead - Unit Based	8.9550	0.0000	
	600	Freight	0.0000	0.4500	
		Total	26.7504	1.4352	28.1856

Report ID : ENS2000

PeopleSoft Bills and Routings
MFG ITEM WHERE USED REPORT

Page No. 1
Run Date: 11/24/2003
Run Time: 15:45:15

SELECTION CRITERIA

User ID: VP1

Run Control ID: BR_ProcessSweep

Bus. Unit : US008

Item Range : FS3000 To FS3000

BOM State : Manufacturing

BOM Type : Production

BOM Code : 1

Eff Date : 11/24/2003

Search : Components Only

Number of levels Deep : 10

PeopleSoft Bills and Routings
MFG ITEM WHERE USED REPORT

Page No. 2
Run Date: 11/24/2003
Run Time: 15:45:15

Report ID : ENS2000

Bus. Unit : US008
Component ID : FS3000
BOM Type : Production
BOM Code : 1
Source CD : FlrS

<u>Lvl</u>	<u>Item ID</u>	<u>Description</u>	<u>Comp Rev</u>	<u>Source Code</u>	<u>Op Seq</u>	<u>Eff Date</u>	<u>Obs Date</u>	<u>Eff Rev</u>	<u>Obs Rev</u>	<u>Quantity</u>	<u>Asy/Ord</u>	<u>Uom</u>	<u>Pos Nbr</u>	<u>Yield</u>	<u>Sub</u>	<u>Non Own</u>	<u>Ph</u>	<u>Ser</u>	<u>ECO</u>
1	.BR4400	Yoke, Brake Subassembly		Make	10	01/01/1900	12/31/2099			5.0000	ASY EA		0	100.0	N	N	N	N	
2	..SR2100	Serial Item		Make	10	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...MT2000	Standard Item		Make	50	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	
3	...MT3000	Mountain Bike, Womans		Make	50	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	
3	...SR1001	Serial Item		Make	30	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...SR1002	Carrera 6000 Hi Performance R		Make	30	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...SR1003	Mt. Whitney 3000 Mountain Bik		Make	30	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
2	..SR2300	Brake Subassembly		Make	10	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...SR1301	Denali 500 Touring Bike		Make	20	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...SR3001	Diablo 500 Touring Bike		Make	20	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	
1	.GR8300	Crank Set Subassembly		Make	20	01/01/1900	12/31/2099			5.0000	ASY EA		0	100.0	N	N	N	N	
2	..SR2001	Ship Serial Item		Make	50	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	
3	...MT2000	Standard Item		Make	30	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	
3	...MT3000	Mountain Bike, Womans		Make	30	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	
3	...SR1001	Serial Item		Make	30	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...SR1002	Carrera 6000 Hi Performance R		Make	30	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...SR1003	Mt. Whitney 3000 Mountain Bik		Make	30	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
1	.GR8500	Crank Set Subassembly		Make	20	01/01/1900	12/31/2099			5.0000	ASY EA		0	100.0	N	N	N	N	
2	..SR2201	Gear Subassembly		Make	20	01/01/1985	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	
3	...SR1301	Denali 500 Touring Bike		Make	20	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	Y	
3	...SR3001	Diablo 500 Touring Bike		Make	20	01/01/1900	12/31/2099			1.0000	ASY EA		0	100.0	N	N	N	N	

Report ID : SFS1100
Bus. Unit : US012--NEW HAMPSHIRE SAUCE/BOTTLING

Report Only: N

Select Options:
Business Unit : US012

By Prdn ID Range: All
Prdn Area Range: All
Item ID Range: All

By Prdn Area Range: All
Item ID Range: All

Close Options:
[Y] In-Process to Complete Due Dates from to
[Y] Pend-Compl to Complete Due Dates from to
[Y] Complete to Clsd/Acctg Cls Dates from to
[Y] Clsd/Labor to Clsd/Acctg Cls Dates from to

Complete Productions with Component Shortages? N
Complete Productions with Remaining Assemblies? N
Variance Distribution Type:

Production Not Closed Due To Outstanding Component Consumed Qty:

Prdn Area	Item ID	Prdn ID	Ty	Due Date	Shift	Complete Date	Clsd/Labor Date	Comp Short	Rem Assembly Scrapped	Status Before Cls	Status After Cls	Config Code
SAUCE	000000000000020013	PRD00178	PR	07/31/2000	2			N	0.0000	In Process	*REJECTED*	
SPICE	000000000000020001	PRD00170	PR	07/31/2000	1			N	0.0000	In Process	*REJECTED*	
SPICE	000000000000020001	PRD00182	PR	08/04/2000	2			N	0.0000	In Process	*REJECTED*	
TMT0	000000000000020008	PRD00171	PR	07/17/2000	2			N	0.0000	In Process	*REJECTED*	
TMT0	000000000000020008	PRD00172	PR	07/21/2000	1			N	0.0000	In Process	*REJECTED*	
TMT0	000000000000020008	PRD00173	PR	07/24/2000	1			N	0.0000	In Process	*REJECTED*	
TMT0	000000000000020008	PRD00174	PR	07/28/2000	1			N	0.0000	In Process	*REJECTED*	

Production Not Closed Due To Outstanding Component Shortages:

PeopleSoft Production Management
PRODUCTION CLOSE PROCESS

Report ID : SFS1100
Bus. Unit : US012--NEW HAMPSHIRE SAUCE/BOTTLING

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Run Date: 11/24/2003
Run Time: 12:00:56

Prdn Area	Item ID	Prdn ID	Ty	Due Date	Shift	Complete Date	Clsd/Labor Date	Comp Short	Rem Assembly Scrapped	Status Before Cls	Status After Cls	Config Code
SAUCEFG	00000000000020024		PR	07/24/2000	2			Y	0.0000	In Process	*REJECTED*	

Production Not Closed Due To Remaining Assemblies:

Prdn Area	Item ID	Prdn ID	Ty	Due Date	Shift	Complete Date	Clsd/Labor Date	Comp Short	Rem Assembly Scrapped	Status Before Cls	Status After Cls	Config Code
SAUCE	00000000000020013	PRD00176	PR	07/17/2000	2			N	200.0000	In Process	*REJECTED*	
SAUCE	00000000000020013	PRD00177	PR	07/24/2000	2			N	150.0000	In Process	*REJECTED*	
SAUCE	00000000000020020	PRD00179	PR	07/18/2000	2			N	88.8000	In Process	*REJECTED*	
SAUCE	00000000000020020	PRD00180	PR	07/24/2000	2			N	500.0000	In Process	*REJECTED*	
SAUCE	00000000000020020	PRD00181	PR	07/31/2000	2			N	250.0000	In Process	*REJECTED*	
SAUCEFG	00000000000020024		PR	07/24/2000	2			N	275.0000	In Process	*REJECTED*	
SAUCEFG	00000000000020024		PR	07/31/2000	2			N	25.0000	In Process	*REJECTED*	
SAUCEFG	00000000000020033		PR	07/17/2000	2			N	375.0000	In Process	*REJECTED*	
TMT0	00000000000020008	PRD00175	PR	07/31/2000	1			N	75.0000	In Process	*REJECTED*	
TMT0	00000000000030008	PRD00226	PR	11/03/2003	1			N	536.0000	In Process	*REJECTED*	

Production Successfully Closed:

Prdn Area	Item ID	Prdn ID	Ty	Due Date	Shift	Complete Date	Clsd/Labor Date	Comp Short	Rem Assembly Scrapped	Status Before Cls	Status After Cls	Config Code
SPICE	00000000000020001	PRD00165	PR	07/17/2000	1	07/31/2000		N	0.0000	Completed	Clsd/Acctg	
SPICE	00000000000020001	PRD00166	PR	07/17/2000	2	07/31/2000		N	0.0000	Completed	Clsd/Acctg	
SPICE	00000000000020001	PRD00167	PR	07/21/2000	2	07/31/2000		N	0.0000	Completed	Clsd/Acctg	
SPICE	00000000000020001	PRD00168	PR	07/24/2000	1	07/31/2000		N	0.0000	Completed	Clsd/Acctg	
SPICE	00000000000020001	PRD00169	PR	07/28/2000	2	07/31/2000		N	0.0000	Completed	Clsd/Acctg	

PeopleSoft Production Management
PRODUCTION CLOSE PROCESS

Report ID : SFS1100
Bus. Unit : US012--NEW HAMPSHIRE SAUCE/BOTTLING

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Run Date: 11/24/2003
Run Time: 12:00:56

Production Area: SPICE	Business Unit : US012	Qty Completed : 3.0000	Prdn Qty : 3.0000	Production Type : Production
Production ID: PRD00165	Item ID: 000000000000020001	Qty Scrapped : 0.0000	Post Date 11/24/2003 12:00	Config Code :

Elemt	Typ	Configuration	Usage	Operation Yield	Component Yield	Matl Lot Size	Mach/Lab Lot Sz	Routing Process	Mix Variance	Outside Process	Total
101	Cls	-0.0321	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-0.0321
300	Cls	0.0000	0.0000	0.0000	0.0000	0.0000	2.7888	-0.0002	0.0000	0.0000	2.7886
301	Cls	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-0.0001	0.0000	0.0000	-0.0001
400	Cls	0.0000	0.0000	0.0000	0.0000	0.0000	53.3500	0.0000	0.0000	0.0000	53.3500
Totals :		-0.0321	0.0000	0.0000	0.0000	0.0000	56.1388	-0.0003	0.0000	0.0000	56.1064

Production Area: SPICE	Business Unit : US012	Qty Completed : 7.0000	Prdn Qty : 9.0000	Production Type : Production
Production ID: PRD00166	Item ID: 000000000000020001	Qty Scrapped : 0.0000	Post Date 11/24/2003 12:00	Config Code :

Elemt	Typ	Configuration	Usage	Operation Yield	Component Yield	Matl Lot Size	Mach/Lab Lot Sz	Routing Process	Mix Variance	Outside Process	Total
101	Cls	-0.0963	-1.7130	0.0000	0.0000	0.0000	0.0000	0.0000	1.1634	0.0000	-0.6459
103	Cls	0.0000	-0.0024	0.0000	0.0000	0.0000	0.0000	0.0000	0.0024	0.0000	0.0000
300	Cls	-0.0576	0.0000	0.0000	0.0000	0.0000	2.6738	-0.0004	0.0576	0.0000	2.6734
301	Cls	-0.0112	0.0000	0.0000	0.0000	0.0000	0.0000	-0.0002	0.0112	0.0000	-0.0002
400	Cls	-1.1000	0.0000	0.0000	0.0000	0.0000	51.1500	0.0000	1.1000	0.0000	51.1500
401	Cls	-2.0400	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	2.0400	0.0000	0.0000
Totals :		-3.3051	-1.7154	0.0000	0.0000	0.0000	53.8238	-0.0006	4.3746	0.0000	53.1773

Production Area: SPICE	Business Unit : US012	Qty Completed : 8.0000	Prdn Qty : 8.0000	Production Type : Production
Production ID: PRD00167	Item ID: 000000000000020001	Qty Scrapped : 0.0000	Post Date 11/24/2003 12:00	Config Code :

Elemt	Typ	Configuration	Usage	Operation Yield	Component Yield	Matl Lot Size	Mach/Lab Lot Sz	Routing Process	Mix Variance	Outside Process	Total

Report ID : SFS1200
Bus. Unit : US012--NEW HAMPSHIRE SAUCE/BOTTLING

Report Only: Y

Select Options:
Business Unit : US012

By Prdn ID Range: All
Prdn Area Range: All
Item ID Range: All

By Prdn Area Range: All
Item ID Range: All

Re-Open Options:
[Y] Pend Compl to In-Process Due Dates from to
[Y] Complete to In-Process Cls Dates from to
[Y] Clsd/Labor to Completed Cls Dates from to
[Y] Clsd/Acctg to Clsd/Labor Cls Dates from to

Prdn Area		Item ID	Prdn ID	Ty	Due Date	Shift	Complete Date	Clsd/Labor Date	Clsd/Acctg Date	Status Before Open	Status After Open	Dstr Type	Configuration Code
SPICE		00000000000020001	PRD00165	PR	07/17/2000	1	07/31/2000	11/24/2003	11/24/2003	Clsd/Acctg	Clsd/Labor		
SPICE		00000000000020001	PRD00166	PR	07/17/2000	2	07/31/2000	11/24/2003	11/24/2003	Clsd/Acctg	Clsd/Labor		
SPICE		00000000000020001	PRD00167	PR	07/21/2000	2	07/31/2000	11/24/2003	11/24/2003	Clsd/Acctg	Clsd/Labor		
SPICE		00000000000020001	PRD00168	PR	07/24/2000	1	07/31/2000	11/24/2003	11/24/2003	Clsd/Acctg	Clsd/Labor		
SPICE		00000000000020001	PRD00169	PR	07/28/2000	2	07/31/2000	11/24/2003	11/24/2003	Clsd/Acctg	Clsd/Labor		
TMT0		00000000000030008	PRD00225	PR	11/03/2003	1	11/03/2003	11/03/2003	11/03/2003	Clsd/Acctg	Clsd/Labor		

PeopleSoft Production Management
PRODUCTION VARIANCE REPORT

Report ID : SFS1500

Page No. 1
Run Date: 11/24/2003
Run Time: 12:05:13

Select Options:
By Prdn ID Range: All
Prdn Area Range: All
Item ID Range: All

By Prdn Area Range: All
Item ID Range: All

Variance Posting Dates from to

Production Due Date/Shift from Shift 1 to Shift 3

Report Variance Total Amount Above: 0.0000

Production Area: SUBASSY Business Unit : US008 Qty Completed : 25.0000 Prdn Qty : 30.0000 Production Type : Production
Due Date : 07/28/2000 Shift: 2 Item ID: LT5000 Qty Scrapped : 5.0000 Post Date 08/16/2000 15:38 Config Code :

<u>Output Item/Description</u>		<u>Output Type</u>	<u>Output Qty</u>	<u>Sched Quantity</u>	<u>Compl Qty</u>					
<u>Elemt Typ</u>	<u>Configuration</u>	<u>Usage</u>	<u>Operation Yield</u>	<u>Component Yield</u>	<u>Matl Lot Size</u>	<u>Mach/Lab Lot Sz</u>	<u>Routing Process</u>	<u>Mix Variance</u>	<u>Outside Process</u>	<u>Total</u>
102	Cls 0.0000	44.0636	0.0000	0.0000	0.0000	0.0000	0.0000	-192.1960	0.0000	-148.1324
301	Cls 0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
500	Cls 0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Totals :	0.0000	44.0636	0.0000	0.0000	0.0000	0.0000	0.0000	-192.1960	0.0000	-148.1324

End of Report

PeopleSoft Production Management
POTENTIAL PRODUCTION VARIANCE REPORT

Report ID : SFS1600
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 1
Run Date: 11/26/2003
Run Time: 08:56:27

Report Only: Y

Select Options:

Business Unit : US008

By Prdn ID Range: All
Prdn Area Range: All
Item ID Range: All

By Prdn Area Range: NONE
Item ID Range: NONE

Close Options:

[Y] In-Process
[N] Pend-Compl
[N] Complete
[N] Clsd/Labor

Report Variances Above This Amount: 0.10

Production Area: FINAL Business Unit : US008 Qty Completed : 10.0000 Prdn Qty : 10.0000 Production Type : Production
Production ID: PRD00228 Item ID: MT2000 Qty Scrapped : 5.0000 Post Date 11/26/2003 08:56 Config Code :

		<u>Output Item/Description</u>	<u>Output Type</u>	<u>Output Qty</u>	<u>Sched Quantity</u>	<u>Compl Qty</u>					
		MT2000	Primary	10.000	10.000	10.000					
		Professional Road Bike, Womans									
<u>Elemt</u>	<u>Typ</u>	<u>Configuration</u>	<u>Usage</u>	<u>Operation Yield</u>	<u>Component Yield</u>	<u>Matl Lot Size</u>	<u>Mach/Lab Lot Sz</u>	<u>Routing Process</u>	<u>Mix Variance</u>	<u>Outside Process</u>	<u>Total</u>
100	Rep	215.5000	545.9000	0.0000	657.0000	0.0000	0.0000	0.0000	0.0000	0.0000	1418.4000
101	Rep	-265.4855	-530.9710	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-796.4565
102	Rep	-96.0980	-192.1960	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-288.2940
103	Rep	361.8450	-723.6900	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-361.8450
104	Rep	-11.1260	-1.7420	0.0000	33.3780	0.0000	0.0000	0.0000	0.0000	0.0000	20.5100
200	Rep	-1.5730	-3.1440	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-4.7170
300	Rep	-0.1190	-0.2380	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-0.3570
301	Rep	2.6675	-98.9950	0.0000	0.0000	0.0000	0.0000	-2.2500	0.0000	0.0000	-98.5775
401	Rep	25.3755	-790.2510	0.0000	0.0000	0.0000	0.0000	-39.8750	0.0000	0.0000	-804.7505

Report ID : SFS1600
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

PeopleSoft Production Management
POTENTIAL PRODUCTION VARIANCE REPORT

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Run Date: 11/26/2003
Run Time: 08:56:29

500	Rep	-29.2220	-151.2280	0.0000	0.0000	0.0000	0.0000	-22.5502	0.0000	0.0000	-203.0002
501	Rep	6.4170	-12.8340	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-6.4170
502	Rep	-31.7500	-260.5000	0.0000	0.0000	0.0000	0.0000	-9.7500	0.0000	0.0000	-302.0000
600	Rep	-2.2500	-4.5000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	-6.7500
Totals :		174.1815	-2224.3890	0.0000	690.3780	0.0000	0.0000	-74.4252	0.0000	0.0000	-1434.2547

End of Report

PeopleSoft Production Management
MATERIAL SHORTAGE REPORT

Report ID : SFS2001
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 1
Run Date: 11/24/2003
Run Time: 12:03:10

SELECTION CRITERIA

User ID: VP1

Run Control ID: PM_Process_Sweep

Business Unit : US008

Issue Method Option: Issue

Shortage Type Option: Production Shortages and Pending Shortages

Production Shortage Dates: All

Report Sequence: Component Id

Print Production Status: Firmed Released In Process Pending Complete

PeopleSoft Production Management
MATERIAL SHORTAGE REPORT

Report ID : SFS2001
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 2
Run Date: 11/24/2003
Run Time: 12:03:10

Production Shortages and Pending Shortages - Issued Components Only

<u>Prdn Area</u>	<u>Item</u>	<u>Production ID</u>	<u>Op</u>	<u>Sq</u>	<u>Per</u>	<u>Op St Date</u>	<u>Time</u>	<u>Sched Quantity/ Deflated Quantity</u>	<u>Issued Quantity/ Scrapped Quantity</u>	<u>Pend Iss Quantity/ Pend Loss Quantity</u>	<u>Pend Pick Quantity</u>	<u>Shortage Quantity</u>
Component ID: FR7002		Bike Frame, Aluminium	Uom: EA		Source Code: Buy							
BPF02	MT2000	Type: Production	Prdn Due Date: 05/02/2003		Prdn Due Shift: 1							
	Standard Item	10	ASY	05/02/2003	10:48	10.0000	0.0000	0.0000	0.0000	0.0000	10.0000	
						10.0000	0.0000	0.0000	0.0000	0.0000		
Component ID: FR7005		Front Fork	Uom: EA		Source Code: Buy							
BPF02	MT2000	Type: Production	Prdn Due Date: 05/02/2003		Prdn Due Shift: 1							
	Standard Item	60	ASY	05/02/2003	12:30	10.0000	0.0000	0.0000	0.0000	0.0000	10.0000	
						10.0000	0.0000	0.0000	0.0000	0.0000		
BPF02	MT2000	Type: Production	Prdn Due Date: 05/02/2003		Prdn Due Shift: 1							
	Standard Item	10	ASY	05/02/2003	10:48	10.0000	0.0000	0.0000	0.0000	0.0000	10.0000	
						10.0000	0.0000	0.0000	0.0000	0.0000		
Component ID: FR7012		Primer Paint	Uom: GAL		Source Code: Buy							
BPF02	MT2000	Type: Production	Prdn Due Date: 05/02/2003		Prdn Due Shift: 1							
	Standard Item	40	ASY	05/02/2003	13:54	5.0000	0.0000	0.0000	0.0000	0.0000	5.0000	
						5.0000	0.0000	0.0000	0.0000	0.0000		
Component ID: HB9000		Handlebar, Pro Road Racing	Uom: EA		Source Code: Buy							
BPF02	MT2000	Type: Production	Prdn Due Date: 05/02/2003		Prdn Due Shift: 1							
	Standard Item	40	ASY	05/02/2003	13:54	10.0000	0.0000	0.0000	0.0000	0.0000	10.0000	
						10.0000	0.0000	0.0000	0.0000	0.0000		
Component ID: LT3009		Blue Paint	Uom: GAL		Source Code: Buy							
BPF02	MT2000	Type: Production	Prdn Due Date: 05/02/2003		Prdn Due Shift: 1							
	Standard Item	40	ASY	05/02/2003	13:54	10.0000	0.0000	0.0000	0.0000	0.0000	10.0000	
						10.0000	0.0000	0.0000	0.0000	0.0000		
Component ID: LT5000		Lot Item	Uom: EA		Source Code: Make							
BPF02	MT2000	Type: Production	Prdn Due Date: 05/02/2003		Prdn Due Shift: 1							
	Standard Item	0	ASY	05/02/2003	08:18	10.0000	0.0000	0.0000	0.0000	0.0000	10.0000	
						10.0000	0.0000	0.0000	0.0000	0.0000		

PeopleSoft Production Management
Dispatch List by Start Date Report

Page No. 1
Run Date: 11/26/2003
Run Time: 09:00:00

Report ID : SFS2002
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

SELECTION CRITERIA

User ID: VP1

Run Control ID: ADHOC

Business Unit : US008

Work Center Range : All

Date Range: 01/01/1900 Thru 11/26/2003

Print Components : Yes

Print Original Components : Yes

Print Op Time Info : Yes

Print Subcontracted Ops : Yes

Print Comments : Yes

Print Prdn ID

Prdn ID Range : PRD00127 Thru PRD00127

Prdn Area Range: All

Item ID: All

Print Prdn Schedules No

PeopleSoft Production Management Dispatch List by Start Date Report

Page No. 2
Run Date: 11/26/2003
Run Time: 09:00:00

			Crew	Mach	Plan	Primary	Owned				Non-Owned	
<u>Work Center</u>	<u>Description</u>	<u>Dept</u>	<u>Size</u>	<u>Res</u>	<u>Res</u>	<u>Crew</u>	<u>Work Center</u>	<u>WIP Location</u>	<u>Work Center</u>	<u>WIP Location</u>	<u>Work Center</u>	<u>WIP Location</u>
BR-ASSY	Brake Assembly Work Center	54000	1.00	1.00	1	ASSY03	SA	AIS1 ROW1 BIN1	NOWN	BIN		
No operations for this Work Center												

PeopleSoft Production Management
Dispatch List by Start Date Report

Report ID : SFS2002
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 3
Run Date: 11/26/2003
Run Time: 09:00:00

Work Center	Description	Dept	Crew Size	Mach Res	Plan Res	Primary Crew	Owned			Non-Owned		
							Work Center	WIP Location		Work Center	WIP Location	
FI-ASSY	Final Assembly Work Center	54000	1.00	1.00	1	ASSY01	FA	AIS1 ROW1		NOWN	BIN	

Item / Description	Rev	Prdn Area	Prdn ID / Prdn Type	Op Seq	Prdn Start / Prdn End Qty	Start Date/Time	Due Date/Time	Task Code	Operation	Send Ahead Qty	Qty Issued / Qty Past Due	Qty Completed/ Qty Scrapped	Subcon
SR1002		FINAL	PRD00127	10	100.0000	07/25/2000	07/26/2000	FORK	Send Ahead	10.0000	0.0000	0.0000	No
Carrera 6000 Hi Performance Ro			Production		100.0000	21:00	10:00				100.0000	0.0000	

Component Items	Description	Sched Quantity	UO	Owned	Consigned	Source Code	Iss Method	Original Comp ID	Description
FR7003	Bike Frame, Carbon Fiber	100.0000	EA	Yes	No	Buy	Kit		
FR7005	Front Fork	100.0000	EA	Yes	No	Buy	Kit		

Type	Time/Rate	Unit	Type	Time/Rate	Unit	Type	Time/Rate	Unit	Type	Time/Rate	Unit
PL R	3.00	Minutes	PM R	3.00	Minutes	CL R	3.00	Minutes			

Item / Description	Rev	Prdn Area	Prdn ID / Prdn Type	Op Seq	Prdn Start / Prdn End Qty	Start Date/Time	Due Date/Time	Task Code	Operation	Send Ahead Qty	Qty Issued / Qty Past Due	Qty Completed/ Qty Scrapped	Subcon
SR1002		FINAL	PRD00127	30	100.0000	07/26/2000	07/27/2000	FINAL	No Overlap		0.0000	0.0000	No
Carrera 6000 Hi Performance Ro			Production		100.0000	10:00	19:00				100.0000	0.0000	

Component Items	Description	Sched Quantity	UO	Owned	Consigned	Source Code	Iss Method	Original Comp ID	Description
HB9002	Handlebar, Touring	100.0000		Yes	No	Buy	Kit		
LT5000	Standard Wheel Subassembly	200.0000		Yes	No	Make	Kit		
PS1004	Pedal, Deluxe	200.0000		Yes	No	Buy	Kit		
SR2001	Gear Subassembly	100.0000		Yes	No	Make	Kit		
SR2100	Brake Subassembly	100.0000		Yes	No	Make	Kit		
ST8000	Bike Seat, Gelflex Racing, Men	100.0000		Yes	No	Buy	Kit		

Type	Time/Rate	Unit	Type	Time/Rate	Unit	Type	Time/Rate	Unit	Type	Time/Rate	Unit
PL R	15.00	Minutes	PM R	15.00	Minutes	CL R	15.00	Minutes			

Report ID : SFS2003
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

SELECTION CRITERIA	
User ID:	VP1
Run Control ID:	PM_Process_Sweep
Business Unit :	US008
Print Prd	
Date Range:	All
Prdn ID Range:	All
Prdn Area Range:	All
Item ID:	All
Report Sequence:	Production
Print Attachments :	Yes
Print Text:	Yes
Print Config Detail :	Yes
Print Original Components :	Yes

PeopleSoft Production Management
PRODUCTION DOCUMENTS

Report ID : SFS2003
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 1
Run Date: 11/24/2003
Run Time: 11:50:20

Production ID: A
Original

Prdn Area	Item / Description	Status	Prdn Type	Rtg/Ref	Rtg Item	Rev	Iss Method	Start/End Qtys	Uom	Start Date	Start Time	Due Date	Due Time	BOM Code
FINAL	MT2000	Pend Cmpl	Production	1		A	Issue	1.0000	EA	09/16/2003	07:00	09/16/2003	08:20	1
	Standard Item			MT2000				1.0000						

Output Item/Description	Output Type	Output Qty	Uom	Per	Sched Quantity	Compl Qty
MT2000	Primary	1.00000	EA	ASY	1.0000	0.00000
Standard Item						

Op Seq	Component ID / Description	Uom	Iss Method	Src Code	Quantity	Per	Yield	Sched Quantity	Owned	Consigned	Original Comp ID	Description
10	FR7002 Bike Frame, Aluminium	EA	Issue	Buy	1.0000000000	Asy	100.0	1.0000	Yes	No		
10	FR7005 Front Fork	EA	Issue	Buy	1.0000000000	Asy	100.0	1.0000	Yes	No		
10	FS3000 Bolt	EA	Issue	Floor Stck	10.0000000000	Asy	100.0	10.0000	Yes	No		
10	FS3001 Washer	EA	Issue	Floor Stck	10.0000000000	Asy	100.0	10.0000	Yes	No		
10	FS3002 Nut	EA	Issue	Floor Stck	10.0000000000	Asy	100.0	10.0000	Yes	No		
30	LT5000 Lot Item	EA	Issue	Make	1.0000000000	Asy	100.0	1.0000	Yes	No		
30	SR2001 Ship Serial Item	EA	Issue	Make	1.0000000000	Asy	100.0	1.0000	Yes	No		
40	FR7012 Primer Paint	GAL	Issue	Buy	0.5000000000	Asy	100.0	1.0000	Yes	No		
40	HB9000 Handlebar, Pro Road Racing	EA	Issue	Buy	1.0000000000	Asy	100.0	1.0000	Yes	No		
40	LT3009 Blue Paint	GAL	Issue	Buy	1.0000000000	Asy	100.0	1.0000	Yes	No		
50	PS1004 Pedal, Deluxe	EA	Issue	Buy	2.0000000000	Asy	100.0	2.0000	Yes	No		
50	SR2100 Serial Item	EA	Issue	Make	1.0000000000	Asy	100.0	1.0000	Yes	No		
50	ST8003 Dual Pad Seat, Womans	EA	Issue	Buy	1.0000000000	Asy	100.0	1.0000	Yes	Yes		

Op Seq	Work Center	Task Code	Subcon	Machine	Crew Size	Intensity	Operation Overlap	Send Ahead Qty Or Overlap %	Start Date	Start Time	Due Date	Due Time
10	FI-ASSY	FORK	No	1.00	1.00	Longest	No Overlap		09/16/2003	07:00	09/16/2003	07:03
20	FI-ASSY	FINAL	No	1.00	1.00	Longest	No Overlap		09/16/2003	07:03	09/16/2003	07:18
30	INSP	INSP	No	1.00	1.00	Longest	No Overlap		09/16/2003	07:18	09/16/2003	07:19
40	PAINT01	PAINT	No	1.00	1.00	Longest	No Overlap		09/16/2003	07:19	09/16/2003	08:19
50	INSP	INSP	No	1.00	1.00	Longest	No Overlap		09/16/2003	08:19	09/16/2003	08:20

PeopleSoft Production Management
PRODUCTION REPORT

Report ID : SFS2004
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 1
Run Date: 11/24/2003
Run Time: 11:47:30

SELECTION CRITERIA

User ID: VP1

Run Control ID: PM_Process_Sweep

Business Unit : US008

Date Range: All

Report Sequence: Production Area

Print Text: Yes

Output Item : Yes

Print Production Status Entered Firmed Released In Process Pend Compl
 Complete Clsd/Labor Clsd Acctg Cancelled

Print Prdn ID

 Prdn ID Range: All

 Prdn Area Range: All

 Item ID: All

Print Prdn Schedules

 Prdn Area Range: All

 Item ID: All

PeopleSoft Production Management
PRODUCTION REPORT

Page No. 2
Run Date: 11/24/2003
Run Time: 11:47:30

Report ID : SFS2004
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Prdn Area	Item / Description	Prdn ID	Status	Prdn Type	Rtg / Ref Rtg Item	Rev	Iss Method	Start Prdn Qty/ End Prdn Qty	Start / Uom Due Date	Start / Due Time	Prdn Start / Due Dt/Shift	Completed / Scrap Qty	Bom Code
BPF01	MT2000 Standard Item <u>Text:</u>	BPF01	Released	Production	1 MT2000	A	Issue	10.0000 10.0000	EA 02/12/2002	14:00 20:42	02/12/2002 1 02/12/2002 2	0.0000 0.0000	1
BPF02	MT2000 Standard Item <u>Text:</u>		Released	Production	1 MT2000	A	Issue	10.0000 10.0000	EA 05/02/2003	08:18 15:00	05/02/2003 1 05/02/2003 1	0.0000 0.0000	1
BPF02	MT2000 Standard Item <u>Text:</u>		Released	Production	1 MT2000	A	Issue	10.0000 10.0000	EA 05/02/2003	10:48 15:00	05/02/2003 1 05/02/2003 1	0.0000 0.0000	1
BPF03	MT3000 Mountain Bike, Womans <u>Text:</u>	BPF03	Released	Production	1 MT3000	A	Issue	10.0000 10.0000	EA 02/12/2002	14:00 19:45	02/12/2002 1 02/12/2002 2	0.0000 0.0000	1
BPF05	LT5010 Custom Road Bicycle Configuration Code: STL-56-BLK-STD-STD-DPD-W -SHM <u>Text:</u>	PRD00291	Released	Production	1 SR1001		Issue	10.0000 10.0000	EA 11/21/2003	14:30 23:00	11/21/2003 1 11/21/2003 2	0.0000 0.0000	0
BPF07	BR4400 Yoke, Brake Subassembly <u>Text:</u>	BPF07	Released	Production	1 BR4400		Issue	10.0000 10.0000	EA 05/19/2003	14:00 20:42	05/19/2003 1 05/19/2003 2	0.0000 0.0000	2
BPF07	BR4400 Yoke, Brake Subassembly <u>Text:</u>	BPF07	Released	Production	1 BR4400		Issue	10.0000 10.0000	EA 05/19/2003	14:00 20:42	05/19/2003 1 05/19/2003 2	0.0000 0.0000	2
BPF08	MT2000		In Process	Production	1	A	Issue	10.0000	EA 11/21/2003	18:48	11/21/2003 2	10.0000	50

PeopleSoft Production Management
 PRODUCTION EFFICIENCY AND UTILIZATION REPORT

Report ID : SFS2005
 Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

Page No. 1
 Run Date: 11/24/2003
 Run Time: 12:06:14

Summarized Labor and Machine Efficiency and Utilization Report From 06/01/2000 to 04/02/2002

Work Center	Lab Avail Hrs	Lab Sch Hrs	Lab Actl Hrs	Lab Earn Hrs	Lab Effic %	Lab Util %	Mch Avail Hrs	Mch Sched Hrs	Mch Actl Hrs	Mch Earn Hrs	Mch Effic %	Mch Util %
FI-ASSY	7632.00	0.00	310.00	435.00	140.32%	4.06%	7632.00	0.00	300.00	435.00	145.00%	3.93%
INSP	7632.00	0.00	40.00	14.95	37.38%	0.52%	7632.00	0.00	15.00	0.00	0.00%	0.20%
PAINT01	7632.00	0.00	25.00	0.75	3.00%	0.33%	7632.00	0.00	65.00	3.00	4.62%	0.85%
SUB-1	0.00	0.00	0.00	1.00	0.00%	0.00%	0.00	0.00	0.00	0.00	0.00%	0.00%
TEST	7632.00	0.00	0.00	55.00	0.00%	0.00%	7632.00	0.00	0.00	55.00	0.00%	0.00%
TEST-SA	7632.00	0.00	0.00	106.50	0.00%	0.00%	7632.00	0.00	0.00	106.50	0.00%	0.00%
WHEEL	30528.00	0.00	90.00	58.50	65.00%	0.29%	0.00	0.00	0.00	0.00	0.00%	0.00%
Grand Totals:	68688.00	0.00	465.00	671.70	144.45%	0.68%	38160.00	0.00	380.00	599.50	157.76%	1.00%

Report ID : SFS2006
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

PeopleSoft Production Management
Component Where Used in Prdn

Page No. 1
Run Date: 11/24/2003
Run Time: 11:46:14

SELECTION CRITERIA

User ID: VP1

Run Control ID: PM_Process_Sweep

Business Unit : US008

Component ID All
Config Code: All

Date Type Prdn Due Dte
Date Range: 06/01/2000 Thru 12/31/2099

Report Sequence: Start Date

Print Substitute Items: Yes

Print Prdn Status: All

Print Prdn ID
Prdn ID Range: All
Prdn Area Range: All
Item ID: All

Print Prdn Schedules
Prdn Area Range: All
Item ID: All

PeopleSoft Production Management
Component Where Used in Prdn

Page No. 6
Run Date: 11/24/2003
Run Time: 11:46:14

Report ID : SFS2006
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR
Component ID: FR7001

Prdn ID	Prdn Area	Item / Description	BCode	Status	Prdn Type	Start Qty / End Qty	Prdn Start / Due Dt &Shift	Prdn Op Sq	Sched Qty	Issued / Lost Qty	Op Start / Due Date	Op Start / Due Time	Op Sq	Task / Work Center
PRD00138	FINAL	SR1003	1	In Process	Production	100.00	07/25/2000 2	10	100.00	0.00	07/25/2000	20:00	10	Add Fork
		Mt. Whitney 3000 Mountain Bike				100.00	07/28/2000			100.00	07/26/2000	09:00		Final Assy
		<u>Substitute Item</u>	<u>Description</u>	<u>Priority</u>		<u>Eff Date</u>	<u>Obs Date</u>	<u>Req Qty</u>	<u>Per</u>					
		FR7002	Bike Frame, Aluminu	10		01/01/1900	12/31/2099		100.00	Asy				
PRD00144	FINAL	SR1003	1	In Process	Production	100.00	07/25/2000 2	10	100.00	0.00	07/25/2000	20:00	10	Add Fork
		Mt. Whitney 3000 Mountain Bike				100.00	07/28/2000			70.00	07/26/2000	09:00		Final Assy
		<u>Substitute Item</u>	<u>Description</u>	<u>Priority</u>		<u>Eff Date</u>	<u>Obs Date</u>	<u>Req Qty</u>	<u>Per</u>					
		FR7002	Bike Frame, Aluminu	10		01/01/1900	12/31/2099		100.00	Asy				
PRD00147	FINAL	SR1003	1	Released	Production	75.00	07/26/2000 2	10	75.00	0.00	07/26/2000	16:30	10	Add Fork
		Mt. Whitney 3000 Mountain Bike				75.00	07/28/2000			0.00	07/26/2000	20:15		Final Assy
		<u>Substitute Item</u>	<u>Description</u>	<u>Priority</u>		<u>Eff Date</u>	<u>Obs Date</u>	<u>Req Qty</u>	<u>Per</u>					
		FR7002	Bike Frame, Aluminu	10		01/01/1900	12/31/2099		75.00	Asy				
PRD00206	CUSTOM	LT5010	1	Released	Production	1.00	08/07/2000 2	10	1.00	0.00	08/07/2000	21:30	10	Add Fork
		STL-56-BLK-CST-STD-GFLX-M-SHM				1.00	08/07/2000			0.00	08/07/2000	21:33		Final Assy
PRD00208	CUSTOM	LT5010	1	Released	Production	1.00	08/07/2000 2	10	1.00	0.00	08/07/2000	21:30	10	Add Fork
		STL-56-BLK-STD-STD-GFLX-M-SHM				1.00	08/07/2000			0.00	08/07/2000	21:33		Final Assy
PRD00250	CUSTOM	LT5010	0	Completed	Production	32.00	11/19/2003 2	10	32.00	0.00	11/19/2003	17:09	10	Add Fork
		STL-56-GRN-STD-STD-CMFRT -SHM				32.00	11/20/2003			32.00	11/19/2003	18:45		Final Assy
PRD00261	CUSTOM	LT5010	0	Completed	Production	48.00	11/19/2003 2	10	48.00	0.00	11/19/2003	09:12	10	Add Fork
		STL-56-GRN-STD-STD-CMFRT -SHM				48.00	11/20/2003			48.00	11/19/2003	11:36		Final Assy
PRD00258	CUSTOM	LT5010	0	Completed	Production	32.00	11/19/2003 2	10	32.00	0.00	11/19/2003	17:12	10	Add Fork
		STL-56-GRN-STD-STD-CMFRT -SHM				32.00	11/20/2003			32.00	11/19/2003	18:48		Final Assy
PRD00253	CUSTOM	LT5010	0	Pend Cmpl	Production	48.00	11/19/2003 2	10	48.00	0.00	11/19/2003	09:09	10	Add Fork
		STL-56-GRN-STD-STD-CMFRT -SHM				48.00	11/20/2003			48.00	11/19/2003	11:33		Final Assy
PRD00236	CUSTOM	LT5010	0	Completed	Production	5.00	11/20/2003 1	10	5.00	0.00	11/20/2003	11:04	10	Add Fork
		STL-56-BLK-STD-STD-CMFRT -SHM				5.00	11/20/2003			5.00	11/20/2003	11:19		Final Assy
PRD00259	CUSTOM	LT5010	0	Completed	Production	16.00	11/20/2003 2	10	16.00	0.00	11/20/2003	09:12	10	Add Fork
		STL-56-RED-CST-STD-CMFRT -SHM				16.00	11/20/2003			16.00	11/20/2003	10:00		Final Assy
PRD00256	CUSTOM	LT5010	0	Completed	Production	5.00	11/20/2003 2	10	5.00	0.00	11/20/2003	14:42	10	Add Fork
		STL-56-RED-CST-STD-CMFRT -SHM				5.00	11/20/2003			5.00	11/20/2003	14:57		Final Assy
PRD00255	CUSTOM	LT5010	0	Completed	Production	10.00	11/20/2003 2	10	10.00	0.00	11/20/2003	12:12	10	Add Fork
		STL-56-GRN-STD-STD-CMFRT -SHM				10.00	11/20/2003			10.00	11/20/2003	12:42		Final Assy

PeopleSoft Production Management
PRODUCTION SCHEDULE BY AREA

Report ID : SFS2007
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR
Prdn Area : SUBASSY

Page No. 1
Run Date: 11/24/2003
Run Time: 16:58:33

11/24/2003 Thru 12/08/2003

Item / Description	November							December						
	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	24	25	26	27	28	29	30	1	2	3	4	5	6	7
LT5000	500	0	0	0	0	0	0	0	0	0	0	0	0	0
Lot Item														

PeopleSoft Production Management
SUBCONTRACTED PURCHASE ORDER REPORT

Page No. 1
Run Date: 11/24/2003
Run Time: 11:58:00

Report ID : SFS2008
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

SELECTION CRITERIA

User ID:	VP1
Run Control ID:	PM_Process_Sweep
Business Unit :	US008
Date Range:	All
Prdn ID Range:	All
Prdn Area Range:	All
Item Id	All
Report Sequence:	Op Start Date
Print Text	Yes
Print Production Status	Firm Released In Process Pend Compl Complete

PeopleSoft Production Management
SUBCONTRACTED PURCHASE ORDER REPORT

Page No. 2
Run Date: 11/24/2003
Run Time: 11:58:01

Report ID : SFS2008
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

<u>Prdn Id</u>	<u>Item / Description</u>	<u>Prdn Status</u>	<u>Area</u>	<u>Work Center</u>	<u>Op Start Date</u>	<u>Start Qty/End Qty</u>	<u>Op Uom</u>	<u>Seq</u>	<u>Po Number</u>	<u>Vendor</u>	<u>Sch Nbr</u>	<u>Po Line</u>	<u>Po Qty</u>	<u>Po Due Date</u>	<u>Qty Recv</u>
PRD00083	MT3000 Mountain Bike, Womans <u>Text:</u>	In Process	FINAL	SUB-1	08/02/2000	200.00 200.00	EA	40	0000000002	SCM0000004 ERNIE'S	1	1	100.00	08/02/2000	100.00
PRD00084	MT3000 Mountain Bike, Womans <u>Text:</u>	Released	FINAL	SUB-1	08/30/2000	100.00 100.00	EA	40	0000000002	SCM0000004 ERNIE'S	2	1	100.00	08/30/2000	0.00
BPF03	MT3000 Mountain Bike, Womans <u>Text:</u>	Released	BPF03	SUB-1	02/12/2002	10.00 10.00	EA	40	Pending Manufacturing Process						

End of Report

PeopleSoft Production Management
MATERIAL PICKING PLAN

Page No. 1
Run Date: 11/24/2003
Run Time: 11:51:39

Report ID : SFS6000
Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR
Date/Shift Thru: 11/24/2003 3
**** Pick The Broken Pallets First****

Kits and Issues - Sorted by Pick Location
Pick Batch ID 28
System Selected Locations



Storage Location: AREA1 1				Component: HB9002		Handlebar, Touring									
															
				HB9002											
<u>Prdn Area</u>	<u>Assembly Item</u>	<u>Description</u>	<u>Prdn ID</u>	<u>Prdn Type</u>	<u>Op</u>	<u>Sq</u>	<u>Per</u>	<u>Wrk Ctr</u>	<u>Description</u>	<u>Req Date</u>	<u>Req Time</u>	<u>Qty Reserved</u>	<u>Uom</u>	<u>Qty Picked</u>	<u>Pick Line</u>
												Pick Line No: 			
FINAL	SR1002	Carrera 6000 Hi	PRD00128	Production	30	ASY	FI-ASSY		Final Assem	07/31/2000	10:00	70.0000	EA		1

Storage Location: AREA1 1		Component: SR2001		Ship Serial Item			
							
		SR2001					
<u>WIP Location</u>		<u>Req Date</u>	<u>Req Time</u>	<u>Qty Reserved</u>	<u>Uom</u>	<u>Qty Picked</u>	<u>Pick Line</u>
				Pick Line No:			
SA	AIS1 ROW1 BIN1	08/30/2000	20:30	10.0000	EA		2

<u>Prdn Area</u>	<u>Assembly Item</u>	<u>Description</u>	<u>Prdn ID</u>	<u>Prdn Type</u>	<u>Op</u>	<u>Sq</u>	<u>Per</u>	<u>Wrk Ctr</u>	<u>Description</u>	<u>Req Date</u>	<u>Req Time</u>	<u>Qty Reserved</u>	<u>Uom</u>	<u>Qty Picked</u>	<u>Pick Line</u>
												Pick Line No:			
FINAL	SR1002	Carrera 6000 Hi	PRD00128	Production	30	ASY	FI-ASSY		Final Assem	07/31/2000	10:00	61.0000	EA		3

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PeopleSoft Production Management
MATERIAL PICKING PLAN

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Kits and Issues - Sorted by Pick Location
Pick Batch ID 28
System Selected Locations



*** Pick The Broken Pallets First***

Storage Location: AREA1 1

Component: SR2300 Brake Subassembly



SR2300

<u>Prdn Area</u>	<u>Assembly Item</u>	<u>Description</u>	<u>Prdn ID</u>	<u>Prdn Type</u>	<u>Op</u>	<u>Sq</u>	<u>Per</u>	<u>Wrk Ctr</u>	<u>Description</u>	<u>Req Date</u>	<u>Req Time</u>	<u>Qty Reserved</u>	<u>Uom</u>	<u>Qty Picked</u>	<u>Pick Line</u>
												Pick Line No: 			
FINAL	SR3001	Diablo 500 Tour	PRD00222	Production	20	ASY	PAINT01		Painting Wo	10/29/2003	17:30	1.0000	EA		4
					Serial:	S30304						1.0000	EA		
					Serial:	S30303						1.0000	EA		

**** Pick The Broken Pallets First****

FR7001

FR7005

WIP Location	Req Date	Req Time	Qty Reserved	Uom	Qty Picked	Pick Line
B3WIP 1	02/12/2002	17:15	10.0000	EA		7
						Pick Line No: 
B1WIP 1	02/12/2002	18:12	10.0000	EA		8
						Pick Line No: 

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Bus. Unit : US008--COLORADO BIKE MFG/OUTDOOR

PeopleSoft Production Management
Production Genealogy Exception

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SELECTION CRITERIA

User ID:	VP1
Run Control ID:	ADHOC
Business Unit :	US008
	Prdn ID Range: All
	Prdn Area Range: All
	Item Id Range: All
Prdn Status	
	In-Process Yes
	Pending Complete Yes
	Complete Yes
	Closed for Labor Yes
	Closed for Accounting Yes
Display Assembly without scrap:	Yes
Sort By:	Prdn ID

PeopleSoft Production Management
Production Genealogy Exception

Report ID : SFS8000
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Prdn Area	Item ID	Prdn ID	Ty	Due Date	Due Time	Status	Uom	Trc Total Qty	PID Comp Qty	Trc Comp Qty	PID Scrap Qty	Trc Scrap Qty
GEARS	GR8500	PRD00221	PR	10/29/2003	23:00	In Process	EA	5.0000	2.0000	2.0000	0.0000	0.0000

Crank Set Subassembly

Assembly Exceptions

Serial Ids associated > Completed + Scrap

Assy Serial ID	Assy Serial ID	Assy Serial ID
X2003Y101	X2003Y102	X2003Y103

Trace Usage rows do not exist

Assy Serial ID	Assy Serial ID
X2003Y099	X2003Y100

Prdn Area	Item ID	Prdn ID	Ty	Due Date	Due Time	Status	Uom	Trc Total Qty	PID Comp Qty	Trc Comp Qty	PID Scrap Qty	Trc Scrap Qty
FINAL	SR3001	PRD00222	PR	10/29/2003	23:00	In Process	EA	2.0000	2.0000	2.0000	0.0000	0.0000

Diablo 500 Touring Bike

Trace Usage rows do not exist

Assy Serial ID	Assy Serial ID	Assy Serial ID	Assy Serial ID	Assy Serial ID	Assy Serial ID
G2003H057	G2003H057	G2003H057	G2003H058	G2003H058	G2003H058

Prdn Area	Item ID	Prdn ID	Ty	Due Date	Due Time	Status	Uom	Trc Total Qty	PID Comp Qty	Trc Comp Qty	PID Scrap Qty	Trc Scrap Qty
GEARS	SR2201	PRD00223	PR	10/29/2003	23:00	In Process	EA	2.0000	2.0000	2.0000	0.0000	0.0000

Gear Subassembly

Trace Usage rows do not exist

Assy Serial ID	Assy Serial ID	Assy Serial ID	Assy Serial ID	Assy Serial ID	Assy Serial ID
J2003K088	J2003K088	J2003K088	J2003K089	J2003K089	J2003K089

End of Report