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PeopleSoft Enterprise Manufacturing 9.0 PeopleBook

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise 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 letter *O*.
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 the W key.
`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.
. . . (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 (|).

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Typographical Convention or Visual Cue	Description
[ ] (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.

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 Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

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Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in 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.

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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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

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PeopleSoft Manufacturing Preface

This preface discusses:

- Oracel's PeopleSoft Enterprise products.
- PeopleSoft Enterprise 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.

Oracle's PeopleSoft Enterprise Products

This PeopleBook refers to these products:

- PeopleSoft Asset Management
- PeopleSoft Cost Management
- PeopleSoft Engineering
- PeopleSoft Flow Production
- PeopleSoft Inventory
- PeopleSoft Order Management
- PeopleSoft Purchasing
- PeopleSoft Supply Planning

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Manufacturing 9.0 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 Enterprise Application Fundamentals PeopleBook*
- *PeopleSoft Enterprise Supply Planning PeopleBook*
- *PeopleSoft Enterprise Source-to-Settle Common Information PeopleBook*
- *PeopleSoft Enterprise Managing Items PeopleBook*

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- *PeopleSoft Enterprise Supply Chain Management Integration PeopleBook*

Pages With Deferred Processing

Several pages in PeopleSoft Enterprise 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

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft 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 executesthe 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.

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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 the 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

Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

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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 Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML

CHAPTER 1

Getting Started with PeopleSoft Manufacturing

This chapter discusses:

- Your enterprise data flow.
- Recognizing your business structure.
- PeopleSoft Manufacturing integrations.
- PeopleSoft Manufacturing implementation.

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 that were 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 that is defined in other PeopleSoft applications, such as PeopleSoft Product Configurator, PeopleSoft Purchasing, PeopleSoft Asset Management, PeopleSoft Accounts Payable, and PeopleSoft General Ledger.

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Recognizing Your Business Structure

The first goal with the 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 new in-house system—without writing all the code. We've already anticipated the features and functionality that you'll need through our application tables, so all you do is complete 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 the corporate chart of accounts.
- How you want to set up the 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 you want to specify automatic revision control for an item.

Note. If your organization requires engineering change orders (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 *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Preparing to Implement PeopleSoft Inventory," Setting Up Location Accounting.

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Preparing to Implement PeopleSoft Inventory".

Additional Considerations for Consumer Products

If you're using consumer products, consider:

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

See Chapter 15, "Defining Production Options," page 253.

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.

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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) that you want to measure for the 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 the current data collection devices to PeopleSoft Quality.

See *PeopleSoft Enterprise Quality 9.0 PeopleBook*, "Integrating PeopleSoft Quality With Other PeopleSoft Applications".

Additional Considerations for PeopleSoft Engineering

If you're using PeopleSoft Engineering, consider these questions:

- What are the procedures for introducing new products and enhancing existing products?
- Do you intend to use engineering change requests (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 the 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 Product Data Management EIP.
- Will you use mass maintenance to modify BOMs?
- Do you require revision control?

  This affects 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 the PeopleSoft system?

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:

- Whether you use electronic data collection and which type of device you'll use: radio frequency, wedge, or batch.
- Whether you integrate to a third-party system and which of the integration points you'll implement.
- Whether you use a manufacturing execution system (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.

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You also can optionally set up chunking for “publish” messages.

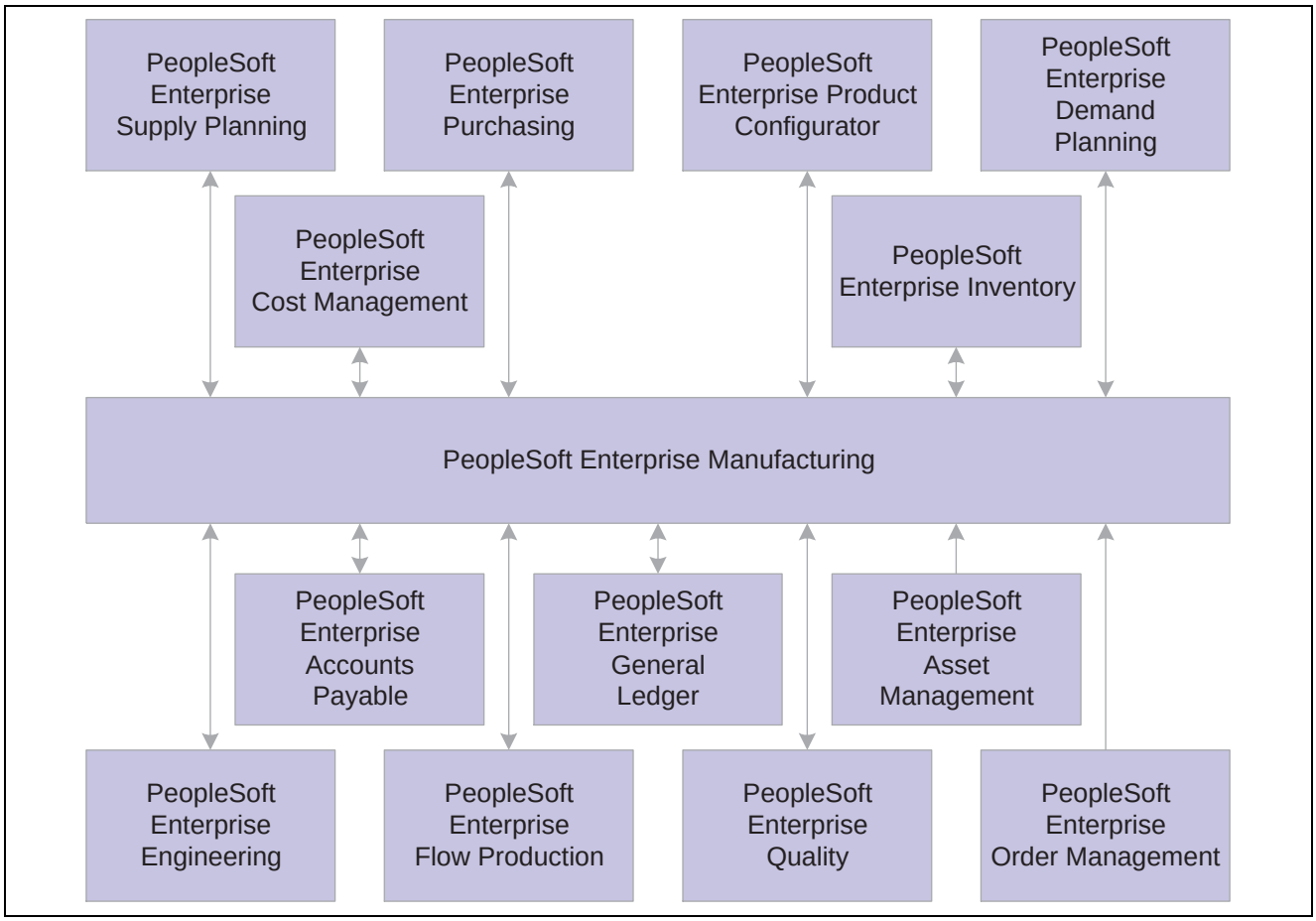
See Chapter 6, “Integrating Oracle’s PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML,” page 59.

See Chapter 5, “Integrating with Third-Party Systems,” page 51.

See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Understanding SCM Integration”.

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.

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PeopleSoft Cost Management

PeopleSoft Cost Management defines the costing and accounting structure for all PeopleSoft Manufacturing operations. You can define various costing methods for an item, such as standard, actual, perpetual, retroactive, and periodic cost. Robust cost analytics are provided to help you analyze the 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 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 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 items 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 that are used to assign 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 that is captured during order management and sends requirements to PeopleSoft Manufacturing.

PeopleSoft Order Management

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

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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. After 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

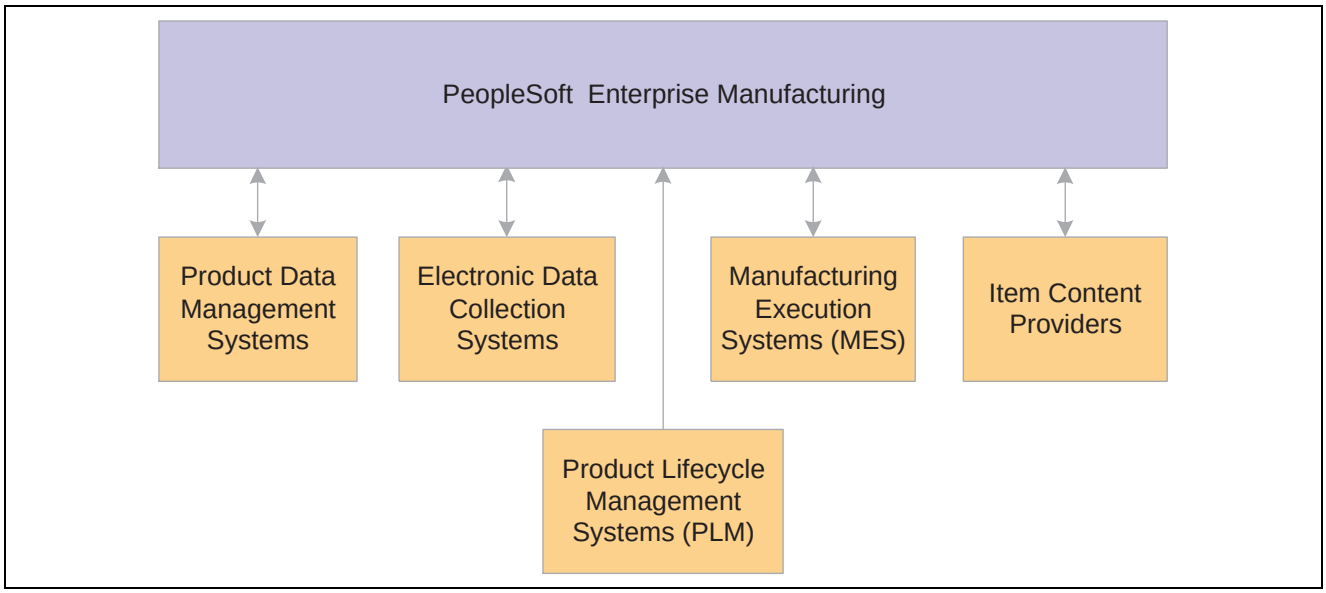
PeopleSoft Quality is used to record quality metrics during the manufacturing phase. PeopleSoft Quality accesses, from PeopleSoft Manufacturing, machine information to define machine stations where samplings occur and work center information to define work centers where samplings occur. If the installation 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 EIPs:



How PeopleSoft Manufacturing integrates with third-party systems

See Chapter 5, “Integrating with Third-Party Systems,” page 51.

See Chapter 6, “Integrating Oracle’s PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML,” page 59.

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

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PeopleSoft Manufacturing EIPs

This section discusses the EIPs that are 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 that is 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 455.
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 *PeopleSoft Enterprise Engineering 9.0 PeopleBook*, "PeopleSoft Engineering Overview". See Chapter 6, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML," page 59.
Item Master (ITEM_SYNC)	Import item information. This is an inbound, asynchronous message. See Chapter 8, "Maintaining Bills of Material," page 89. See *PeopleSoft Enterprise Engineering 9.0 PeopleBook*, "PeopleSoft Engineering Overview". See Chapter 6, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML," page 59.
Production Completions (PRODUCTION_ORDER_ COMPLETION)	If you use a third-party system to record completions for 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 517.
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 455.

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EIP Name	Description
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 311.
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 448.
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 275. See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, "Processing Enterprise Integration Points (EIPs)".

PeopleSoft Manufacturing Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for the organization based on the features 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 the 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
Item Groups	INV_ITEM_GROUPS_CI	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Defining Item Control Values," Setting Definitions for Item Control Values.
Ultimate Use Code	SUT_USE_CI	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information.

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Component	Component Interface	Reference
Item Load from Excel	IN_MST_ITM_XLS	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Loading Items," Using the Excel to Component Interface Utility.
Sales and Use Tax Authorities	TAX_AUTHORITY_CI	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Sales and Use Tax Authorities and Codes.
Sales and Use Tax Codes	TAX_CODE_CI	See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining Financials and Supply Chain Management Common Definitions," Defining Sales and Use Tax Authorities and Codes.
Distribution Type	CM_DISTR_TYPE_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Setting Up the Accounting Rules Structure," Defining Distribution Types.
Automatic Serial Numbers	AUTO_SERIAL_NUM_CI	See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Defining Items by SetID".
Transfer Attributes	UNIT_TRANSFER_DEF_CI	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Transferring Stock Between Business Units".
Transfer Attributes Defaults	TRANS_UNIT_INV_CI	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Transferring Stock Between Business Units".
Production Conversion Codes	CE_CONCODE_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Defining the Cost Foundation for Makeable Items".
Costing Conversion Overhead Rates	CE_CONV_OH_RATE_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Defining the Cost Foundation for Makeable Items".
Conversion Rates	CE_CONV_RATE_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Defining the Cost Foundation for Makeable Items".
Forecasted Purchase Costs	CE_FCST_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Defining the Cost Foundation for Makeable Items".

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Component	Component Interface	Reference
Additional Item Costs	CE_ITEMEXP_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Defining the Cost Foundation for Makeable Items".
Conversion Overhead Codes	CE_OHCODE_CODE_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Defining the Cost Foundation for Makeable Items".
Bill of Material Privileges	EN_IC_BOM_PRIV_CI	See Chapter 8, "Maintaining Bills of Material," page 89.
Item Price Markup	MARKUP_PCT_INV_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Managing Transfers".
Production Replenish Locations	REPL_LOCATIONS_CI	See Chapter 22, "Issuing Material to Production," page 417.
Item Transfer Price	STD_PRICE_INV_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Managing Transfers".
Floor and Ceiling Costs	CM_VALUE_REF_PGRP_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Analyzing Financial Transactions," Generating Reports of Financial Transactions.
Fixed Picking Locations	FIXED_PICK_BINS_CI	See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Picking Inventory," Assigning Fixed Picking Locations.
Crew Actual Costs	CE_CREW_ACTCOST_CI	See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, "Setting Up Actual and Average Costing for Makeable Items," Establishing Actual Costs for Crew.

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 Enterprise Application Fundamentals 9.0 PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces

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CHAPTER 2

Understanding PeopleSoft Manufacturing

This chapter discusses:

- Solutions for production management challenges.
- Solutions for 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

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

PeopleSoft Manufacturing incorporates into the standard system design such functionality as:

- Synchronized 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 Production Management Challenges

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

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The PeopleSoft Manufacturing business solution synchronizes planning and execution throughout an 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 the PeopleSoft Manufacturing system 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 the supply planning and management processes. Whether the 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 the processes flawlessly. Enterprise-ready applications provide swift, efficient access to the information you need at every level of the 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 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. 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 complex product and process structures and multiple subcontracting and nonsubcontracting scenarios.

You can:

- Set up, maintain, and run inquiries and reports on 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.

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- 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.

After 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 will build the product. You can maintain crew, machine, and tool data by incorporating multimedia attachments and text.

PeopleSoft Manufacturing works 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.

The PeopleSoft Manufacturing system synchronizes planning and execution throughout the 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. Core functionality such as backflushing, shift reporting, subcontracting, JIT support, and serial and lot tracking enables you to shape the production functions to match the way you organize your business.

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. PeopleSoft Supply Planning provides an APS system that enables realtime optimization of plant-level procurement and production.

PeopleSoft Supply Planning enables you to weigh 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, and safety stock, as well as customer requested and scheduled ship dates, producing down-to-the-second production schedules.

PeopleSoft Inventory

PeopleSoft Inventory provides integration capabilities; tracking, analysis, and reporting tools; and item maintenance and storage location features.

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.

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PeopleSoft Quality

PeopleSoft Quality enables you to control the processes, automate labor intensive tasks, improve communication within the enterprise, and accelerate ISO 9000 certification.

PeopleSoft Quality combines online statistical process control (SPC) data collection with the power of a relational database. You can use PeopleSoft Quality to configure the 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. PeopleSoft Cost Management enables you to define the cost foundation, manage product costs, cost and create accounting lines for financial-related inventory transactions, and analyze financial transactions and manufacturing variances.

PeopleSoft Engineering

PeopleSoft Engineering helps you manage the product introduction and change process throughout an enterprise in a dynamic design-to-deploy business solution. 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 the engineering and manufacturing process.

See Chapter 2, "Understanding PeopleSoft Manufacturing," Suite of PeopleSoft Product Development Business Solution Applications, page 17.

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 Enterprise Flow Production PeopleBook.*

Solutions for 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.

The PeopleSoft Product Development business solution places you in control of the 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.

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Robust Functionality

The PeopleSoft Product Development business solution enables you to define and maintain ECRs, 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, and incorporate PeopleSoft Workflow.

The work 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.

Integrated Process-Oriented Solution

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.

The process-oriented approach enables you to view data in terms of business processes rather than as raw transactions, making it easy for managers and directors to access the information that they need to meet operational objectives.

Suite of PeopleSoft Product Development Business Solution Applications

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

- PeopleSoft Manufacturing
- PeopleSoft Cost Management
- PeopleSoft Inventory
- PeopleSoft Engineering

PeopleSoft Engineering

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

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 the 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.

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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.

- 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.

- Enterprise document management integration with secure versioning.

- 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 the 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 effectivity); 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.

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Support for the Consumer Product Industry

PeopleSoft Manufacturing addresses the needs of the process-oriented consumer products industry by providing 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 89

Chapter 18, “Maintaining Production Orders and Production Schedules,” page 311

Flow Production

Flow production is a JIT-based pull system that manufactures to customer order rather than to forecasts. You design the production lines and processes to produce a constantly changing mix of products at a steady rate (known as TAKT time). Use 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 the 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, after the replenishment request is dispatched, the vendors can view the request on the internet.

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See Also

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Maintaining Kanban Cards and Replenishment Requests"

PeopleSoft Enterprise eSupplier Connection 9.0 PeopleBook, "Reviewing Supplier Account Activity"

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 311

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 311

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.

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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 311

PeopleSoft Product Configurator PeopleBook

Third-Party Integration

This section discusses:

- Integration with item content providers.
- Integration with other product data management systems.
- Integration with product life cycle management applications.
- Integration with manufacturing execution systems (MES).
- Integration with electronic data collection systems.

See Also

Chapter 5, "Integrating with Third-Party Systems," page 51

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.

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

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

See Also

Chapter 5, "Integrating with Third-Party Systems," page 51

Integration with Product Life Cycle Applications

You can now send item, revision, and manufacturing BOM information using product life cycle management (PLM) applications to manage new product introductions and change orders externally from PeopleSoft using the product data exchange (PDX) version 1.0 XML format.

See Chapter 6, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML," page 59.

Integration with Manufacturing Execution Systems

You can use an 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 the PeopleSoft system to the MES.
- Communicate item revision information from the PeopleSoft system to the MES.
- Send operation and order completion and scrap information from the MES to the PeopleSoft system.
- Send component item usage from the MES to the PeopleSoft system.
- Analyze production performance in either the PeopleSoft system 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. The PeopleSoft system is the system of record for setup information, including item masters, BOMs, and routings.

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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. The PeopleSoft system 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 51

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, "Integrating to Electronic Data Collection Systems"

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 the 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.

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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 BU.

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 BU.

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 BU 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.

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When a production ID or production schedule is identified as frozen for substitutes, no substitution is 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 89

PeopleSoft Enterprise Engineering 9.0 PeopleBook, “Maintaining Engineering Bills of Material”

Chapter 20, “Maintaining Operation Lists,” page 389

Chapter 22, “Issuing Material to Production,” page 417

Chapter 23, “Completing Operations and Recording Scrap,” page 455

Chapter 25, “Subcontracting,” page 529

PeopleSoft Enterprise Supply Planning PeopleBook

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.

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- 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 BU level because each BU can discontinue items with different use-up dates. Use up works in conjunction with item substitution. After 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 has not 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.

AFter the item is 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 remain 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 89

PeopleSoft Enterprise Engineering 9.0 PeopleBook, “Maintaining Engineering Bills of Material”

PeopleSoft Enterprise Supply Planning PeopleBook

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 Enterprise Managing Items 9.0 PeopleBook, “Working with Items”

Quantity Rounding Exceptions in PeopleSoft Manufacturing

Rounding rules do not apply within these three areas of PeopleSoft Manufacturing:

- QPA (quantity per assembly).

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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 require 1 component B0004. 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, thereby incorrectly inflating 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 A0007. If A0007 costs 1.00 USD, then 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 the affect of the rounding. Thus, to achieve the most accurate cost, we do not 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 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 locations 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 and labor costs incurred are charged to the rework expense account. You can view all rework costs in PeopleSoft Cost Management.

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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. By selecting a 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.

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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.

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CHAPTER 3

Defining Your Business Unit Structure

This chapter provides an overview of business unit structures and discusses how to establish manufacturing business units.

Understanding Business Unit Structures

In the PeopleSoft system, business units are operational subsets of an organization that enable you to plan operations based on the way that the organization really functions.

Before you implement PeopleSoft Manufacturing for an organization, take a close look at how the business functions operationally. You must decide how to map the operational business structures—including storage locations, bills of material (BOMs), routings, costs, and procedures—into PeopleSoft Manufacturing.

Prerequisite

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

See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "Defining Your Operational Structure in PeopleSoft Inventory".

Establishing Manufacturing Business Units

To define business unit options for a manufacturing business unit, use the Manufacturing Business Unit (MG_BUSIN_UNIT) component. To define manufacturing business unit options, use the Manufacturing Business Unit Options (MG_BUS_UNIT_OPT) component.

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

There are several ways that you can set up PeopleSoft Manufacturing to run an enterprise. Your selections affect which pages you can access, how you maintain or present data, and how transactions work.

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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 a manufacturing business unit:

1. Enter values in the Description field and the Short Desc (short description) field for the manufacturing business unit.

   The Inv Business Unit (inventory business unit) field is display-only.
2. Indicate whether the facility status is *Open* or *Closed*.

Note. You must set the facility status to *Open* to manage production or add BOMs or routings.

Setting Up Manufacturing Business Unit Options

Access the MFG Business Unit Options page.

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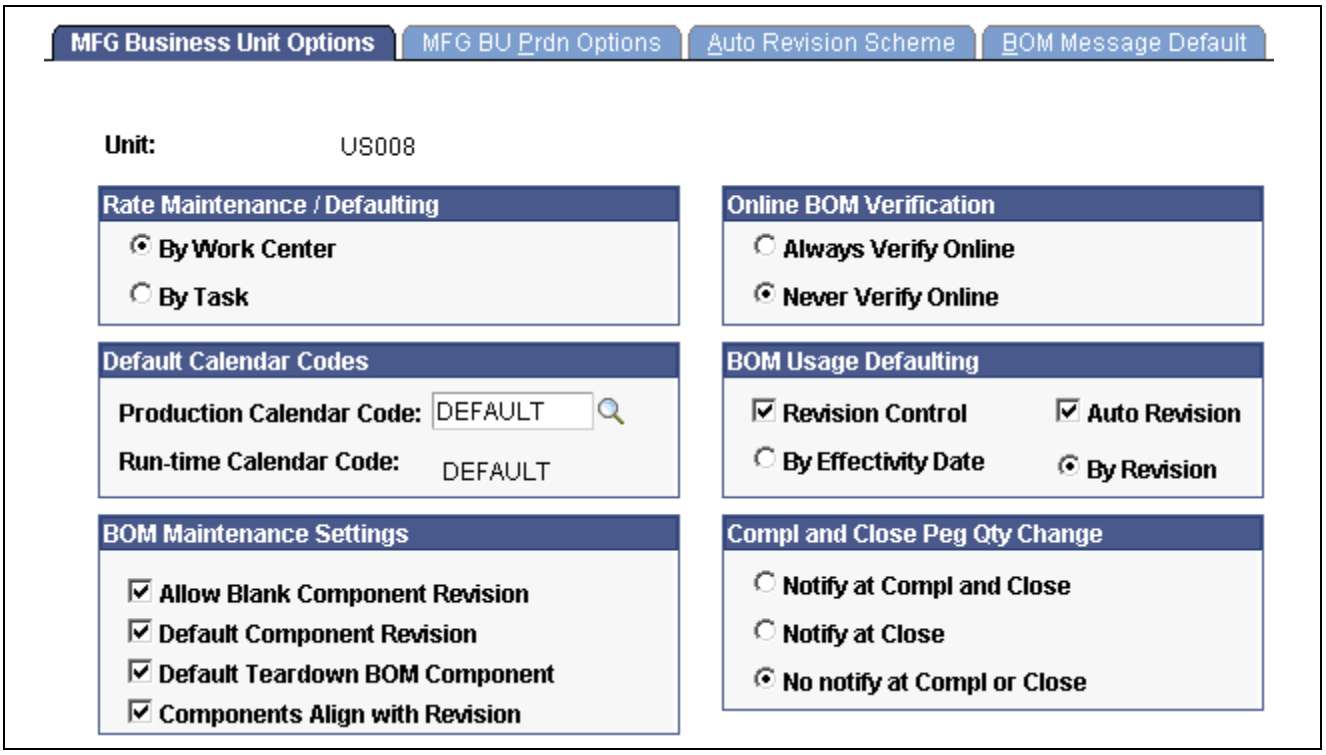

Manufacturing Options - MFG Business Unit Options page

Rate Maintenance/Defaulting

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

If you determine that labor, machine, and overhead rates and costs are to be tracked by department or cost center, select By Work Center; all tasks assigned to the work center will use the same conversion rates and overhead rates. If you determine rates and costs are to be tracked by crew or resource, select 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

Specify how to handle online verification for production BOMs. If you use PeopleSoft Engineering, you can also specify how to handle online verification for engineering BOMs:

Always Verify Online Runs the process online during BOM maintenance.

Never Verify Online Runs the verification as a deferred process.

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

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Default Calendar Codes

To indicate a default production calendar for the manufacturing 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 that you create for the business unit is the default for this field. It is treated as the primary production calendar for the business unit. If a calendar code is not associated with a work center—or if the calendar code associated with the work center is not effective yet or is obsolete—the system uses the calendar defined here to schedule production.

The Run-time Calendar Code field is display-only. It indicates which calendar code is used as the default production calendar for the business unit.

When you associate a different calendar code than the current runtime calendar code, the system optionally sends a workflow notification to selected roles that you define. This workflow notification indicates to the user (such as a production control manager) that the calendar originally used for scheduling is not in sync with the calendar code specified for the business unit.

If you do not define a calendar code and an associated calendar for the business unit—or if the production calendar associated with the business unit runs out—PeopleSoft Manufacturing uses the default 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

The BOM Usage Defaulting group box enables you, at the business unit level, to indicate whether you 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 specify an effective revision that equates to an effectivity date.

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

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

- 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 that the system uses to generate automatic revisions.

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BOM Maintenance Settings

Allow Blank Component Revision and **Default Component Revision**

Select these two check boxes to define component revision default settings that affect the BOM Maintenance pages. The check boxes only apply to revision-controlled items. In addition, they operate independently of each other. 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 it is the most common setting for revision-controlled environments. However, if the 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 the current date 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 are 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 By Effective Date so that new components for that assembly can be created for dates not associated with the assembly revision.

Compl and Close Peg Qty Change

This group box controls how often pegging notifications are sent to a user or group of users when changes are made on a production ID. PeopleSoft Manufacturing has a number of common circumstances that could cause excessive pegging notifications to be generated. For example, normal scrap activity during the completions process could result in quantity reduction notifications. Completing serial controlled items would generate a receipt notification for every serialized item. The close process generates close notifications for every order closed.

PeopleSoft Manufacturing offers three options for controlling the number of pegging notifications generated during the completions and close processes:

- Notify at Compl and Close: Enables all normal pegging notifications including order quantity changes and closing of production.

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- Notify at Close: Enables normal notifications in the production close process and suppresses order quantity change notifications during compl
- No Notify at Compl or Close: Suppresses close notifications during the close process and suppresses quantity change notifications during completions.

See Also

Chapter 8, "Maintaining Bills of Material," page 89

PeopleSoft Enterprise Engineering 9.0 PeopleBook, "Maintaining Engineering Bills of Material"

Chapter 4, "Establishing Production Calendars," Defining the Work Week, page 46

Chapter 4, "Establishing Production Calendars," Defining Your Default Production Week Calendar, page 46

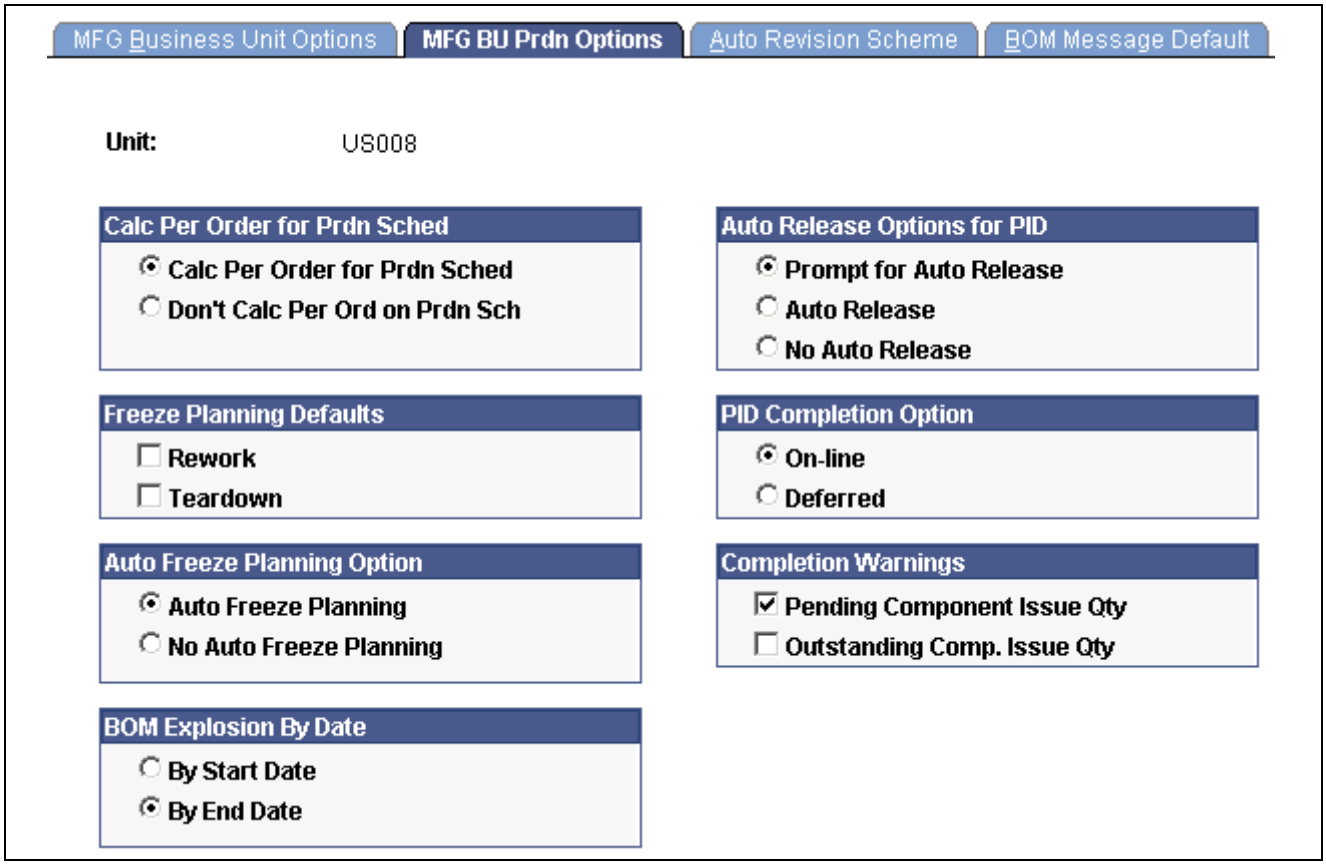
Chapter 2, "Understanding PeopleSoft Manufacturing," Additional Manufacturing Functionality, page 23

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Manufacturing Information for an Item

PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook, "Pegging Supply and Demand"

Setting Up Manufacturing Business Unit Production Options

Access MFG BU Prdn Options page.



MFG BU Prnd Options page

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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 that you record a completion on a production schedule. This means that the per order quantity will be consumed from the work-in-progress (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 do not want the pending issue quantity automatically filled. Selecting this option means that 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 to you want to handle the releasing of production IDs on the shop floor for the manufacturing business unit. You can select from any of these options:

Prompt for Auto Release The system prompts you to release the selected production ID (with a status of Entered or Firm) when recording completions, scrap, or editing components.

Click *Yes* to automatically release the production ID and streamline 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 *Entered* or *Firmed* from the Record Completions/Scrap and Edit Issue Components pages. You are not prompted to release the production ID.

No Auto Release The system does not allow you to automatically release production. You must use the Production ID Status Change page or the Production Status Change page to release production for the 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 does not reschedule frozen orders to repair capacity violations.

Select Rework to freeze all new rework orders.

Select Teardown 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 325.

PID Completion Option

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

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On-Line This option indicates that you 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.

BOM Explosion By Date

By Start Date or **By End Date** Select 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 the autofreeze planning option so that the system automatically freezes operations for production based on specified events in the manufacturing process. This enables PeopleSoft Supply Planning to reschedule production based on particular operations. You can also freeze or unfreeze operations manually while maintaining the operation list.

Select Auto Freeze Planning to have 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 does not 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 do not want the system to automatically freeze production operations.

See Also

Chapter 19, "Maintaining Component Lists," page 371

Chapter 21, "Releasing Production and Changing Production Statuses," page 407

Chapter 20, "Maintaining Operation Lists," page 389

Chapter 23, "Completing Operations and Recording Scrap," page 455

Defining Revision Schemes

Access the Auto Revision Scheme page.

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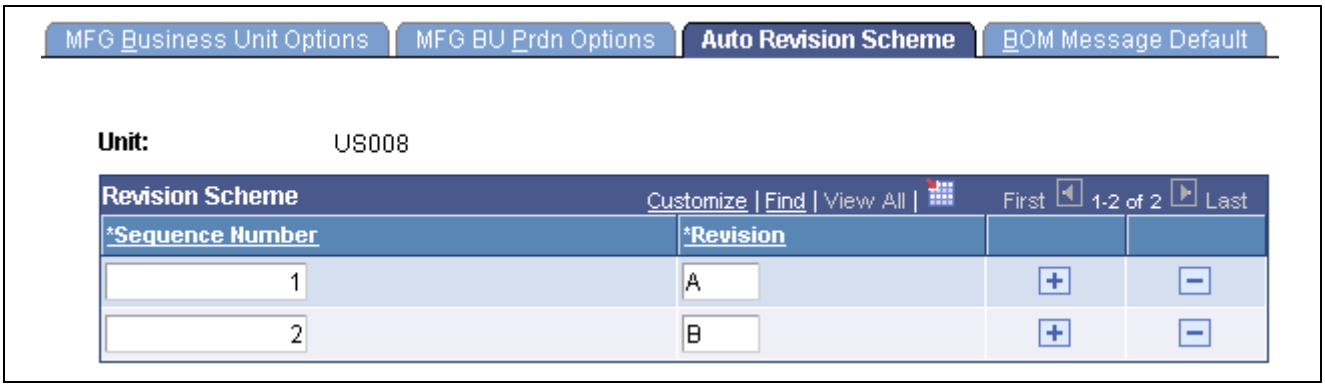

Manufacturing Options - Auto Revision Scheme page

Note. This page is primarily intended for use during implementation of the system.

Revision Scheme

You generate automatic revisions by using the mass maintenance functionality. Before creating an automatic revision, however, the system must determine which scheme or sequence of revisions to use to create the next revision. On the Revision Scheme page, you create such a revision scheme by entering sequence numbers as well as an alphanumeric order for the 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 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 does not update the sequence of revisions already in use on an item.

Note. You cannot enter duplicate sequence numbers or revisions numbers or letters. If you try to change or delete revision names that are already in use on a BOM, you receive a warning message.

Setting Up BOM Messages

Access the BOM Message Default page.

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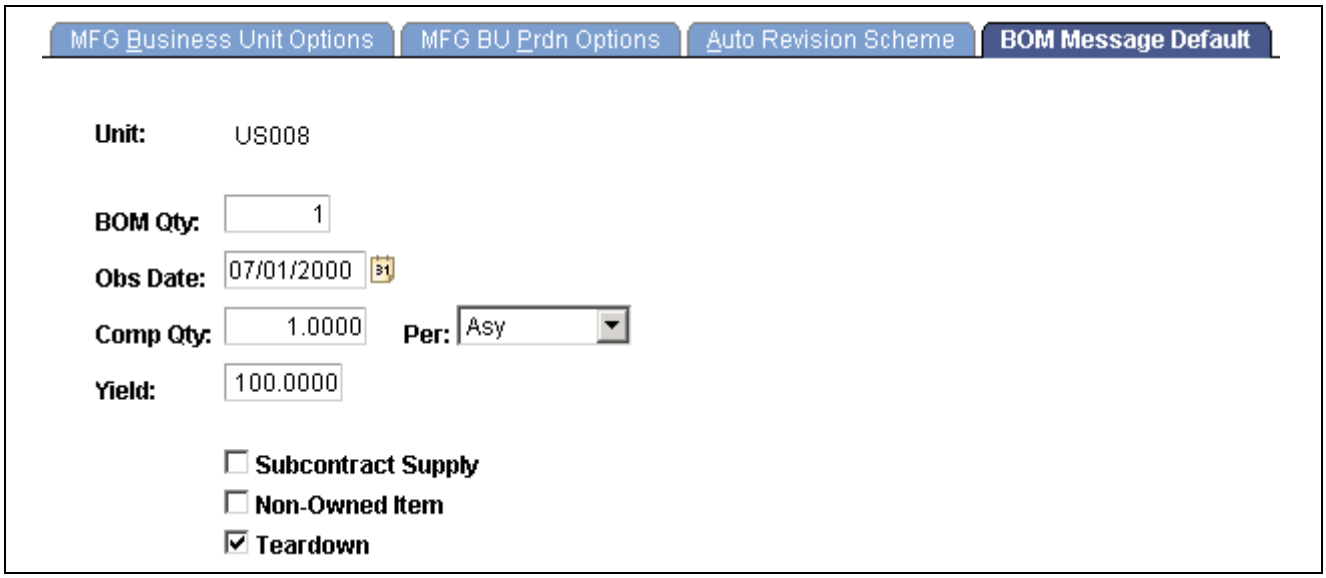

Manufacturing Options - BOM Message Default page

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

Indicate the 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 assembly or per order. If you set the quantity per assembly—and when the system determines component requirements in PeopleSoft Supply Planning—the system divides the quantity-per by the BOM quantity and then multiplies that result by the demand or order quantity. If you set quantity Per field 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 the manufacturing process and you want to assign this status to incoming BOM messages.

Select Non-Owned Item for incoming BOM messages if you do not own the component, and you want to indicate that the component is consigned to you or is supplied by a 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 89

Chapter 5, “Integrating with Third-Party Systems,” page 51

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CHAPTER 4

Establishing Production Calendars

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

- 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 the PeopleSoft Inventory and Manufacturing business units.

See Also

Chapter 3, "Defining Your Business Unit Structure," page 31

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.

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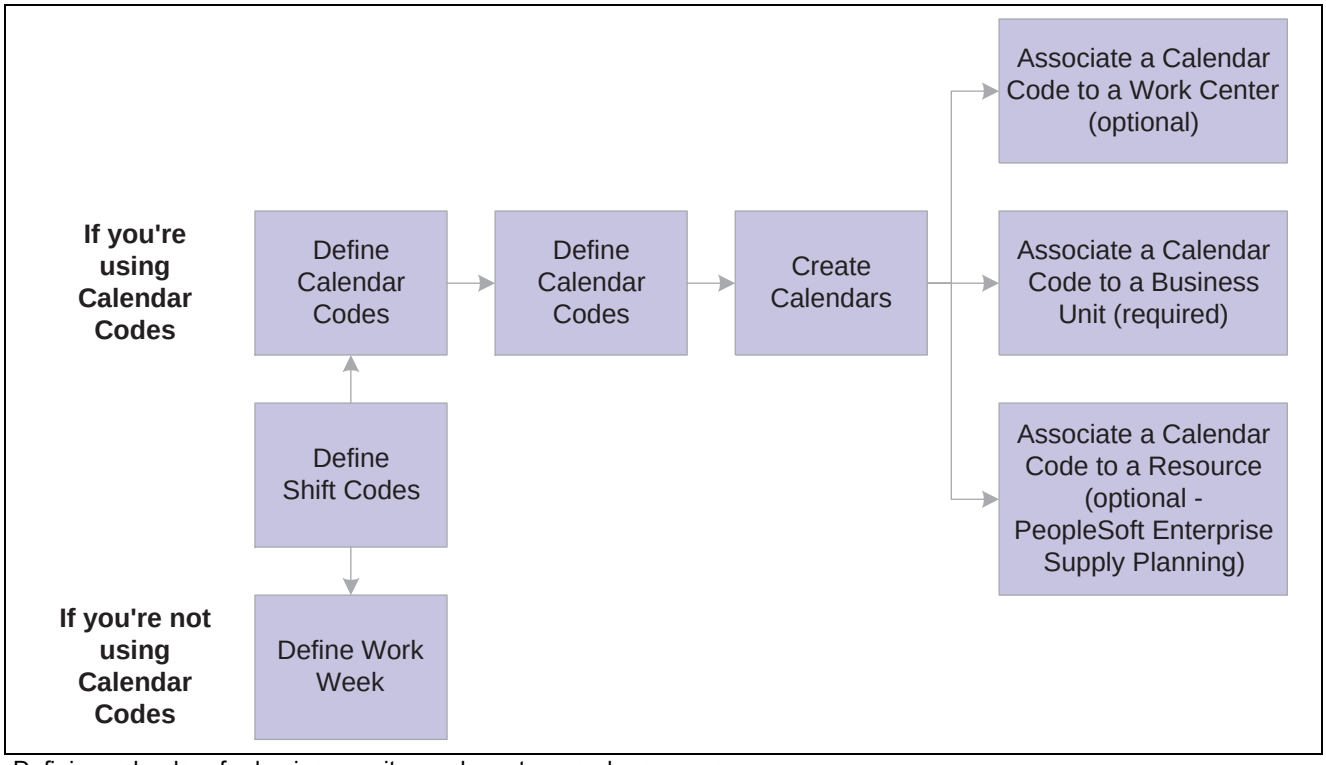
You can assign a single calendar code and its associated calendar to multiple work centers if they have similar working and nonworking days.

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.

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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 the 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 389

Chapter 12, "Defining Work Centers," page 193

Chapter 11, "Defining Resources," page 185

Defining Shift Codes

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

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This section discusses how to define shift codes associated with production calendars. When setting up production and alternate calendars or the 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 the 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 the shift codes here, use these codes, along with the production dates, to define the 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, the production dates and actual dates are the same. If you have a production shift that spans two days, the actual date for production may be different than the production date. The system determines the actual date by the actual time that the 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.

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

This section discuss how to:

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

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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 the production calendar associated with the 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, the 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 43

Defining Your Default Production Week Calendar

Access the Default Production Week page.

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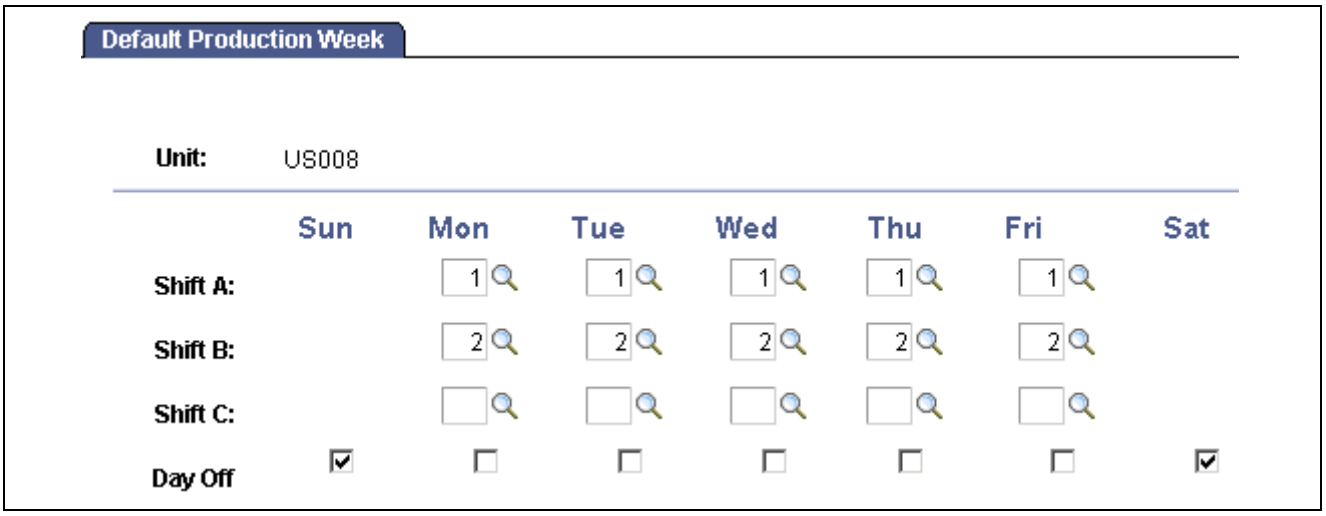

Default Production Week page

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 the shift codes and default production calendar week for the 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 the 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.

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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 50

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

Defining Calendar Codes

Access the Calendar Code Definition page.

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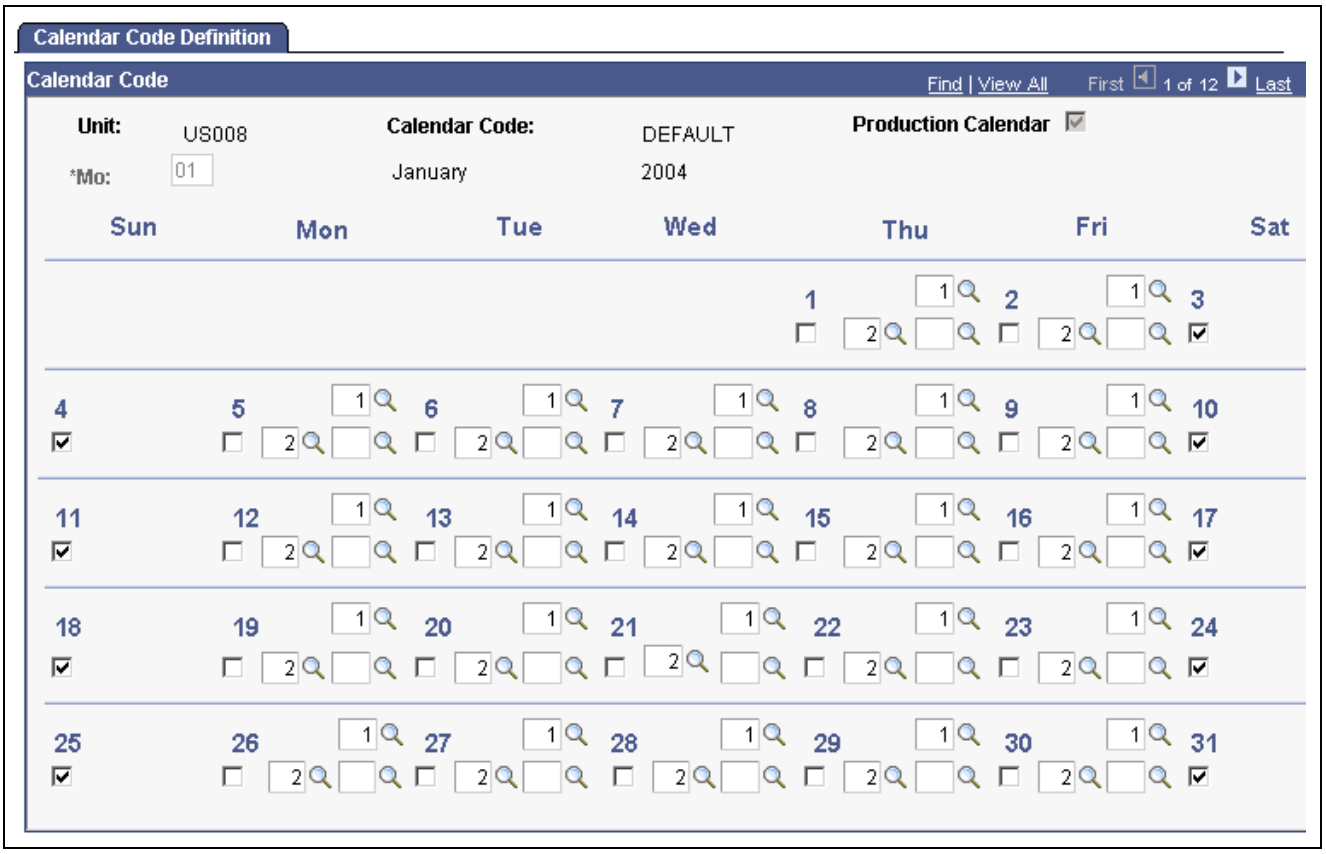

Calendar Code Definition page

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.

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Creating Run Time Calendars

To create run time calendars, use the Create Calendars (RUN_MGS3000) component.

Once you have defined the 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 43

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 Enterprise PeopleTools 8.48 PeopleBook: Process Scheduler

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CHAPTER 5

Integrating with Third-Party Systems

This chapter gives an overview of integrating with third-party systems and discusses how to manage the 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.
- Product life cycle management applications.

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

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- 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 Enterprise Supply Chain Management Integration 9.0 PeopleBook, "Integrating to Electronic Data Collection Systems"

Chapter 22, "Issuing Material to Production," Processing Picking Plans Using Electronic Data Collection, page 449

Chapter 22, "Issuing Material to Production," Processing Kit Issues and Returns Using Electronic Data Collection, page 452

Chapter 22, "Issuing Material to Production," Issuing Material Using Electronic Data Collection, page 448

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Maintaining Kanban Cards and 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.

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PeopleSoft provides several enterprise integration points (EIP) to these systems to maximize ease of importing item data into the PeopleSoft database. Using Application Messaging technology, you can keep this information up to date within the 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

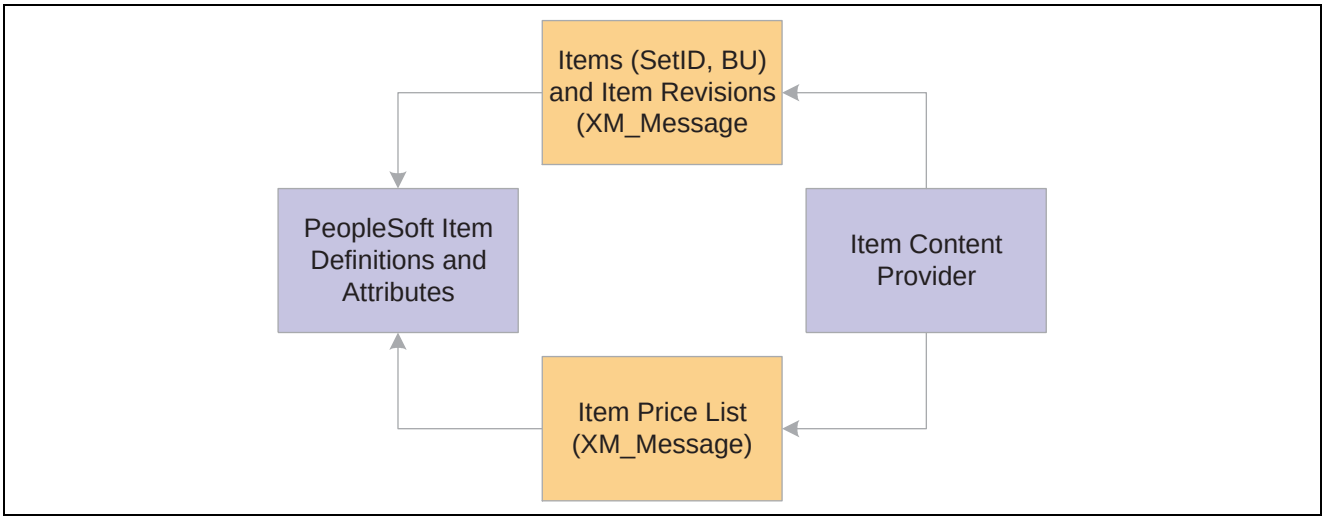
Note. For Item Content Providers, PeopleSoft supports inbound messages only.

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.

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See *PeopleSoft Enterprise Engineering 9.0 PeopleBook*, “PeopleSoft Engineering Overview”.

Using the Item Pricelist Transaction

Item Pricelist messages update the 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 Enterprise Supply Chain Management Integration 9.0 PeopleBook, “Understanding SCM Integration”

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 the third-party PDM system to PeopleSoft. Using PeopleSoft Application Messaging technology, the third-party system is able to publish messages to the PeopleSoft system.

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.

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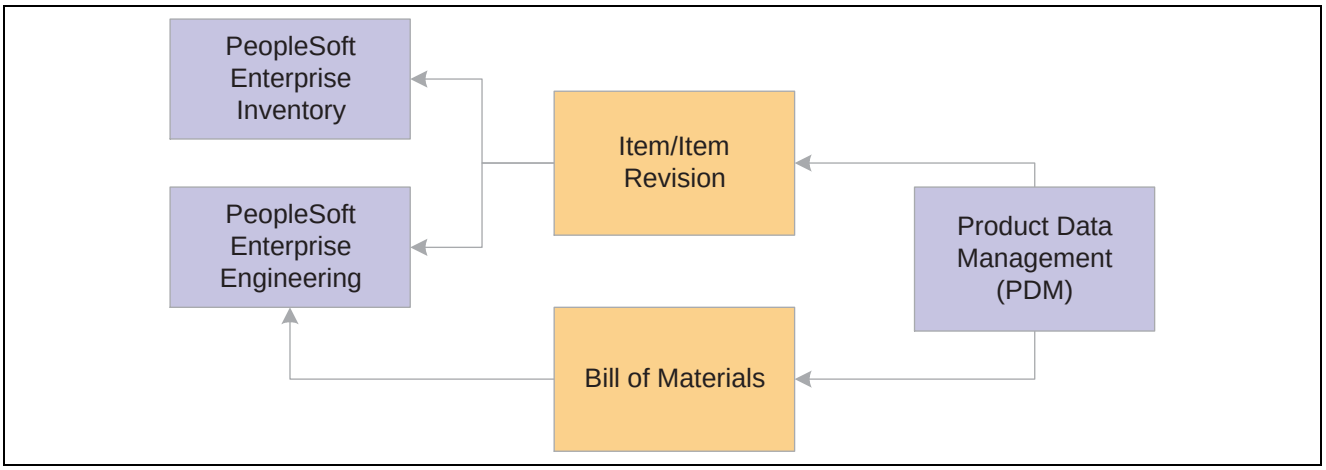

Product data management process

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 the PeopleSoft system. You maintain quantity information in the PeopleSoft applications rather than in the PDM.

See *PeopleSoft Enterprise Engineering 9.0 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 89.

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, "Processing Enterprise Integration Points (EIPs)"

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

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- 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 MES.

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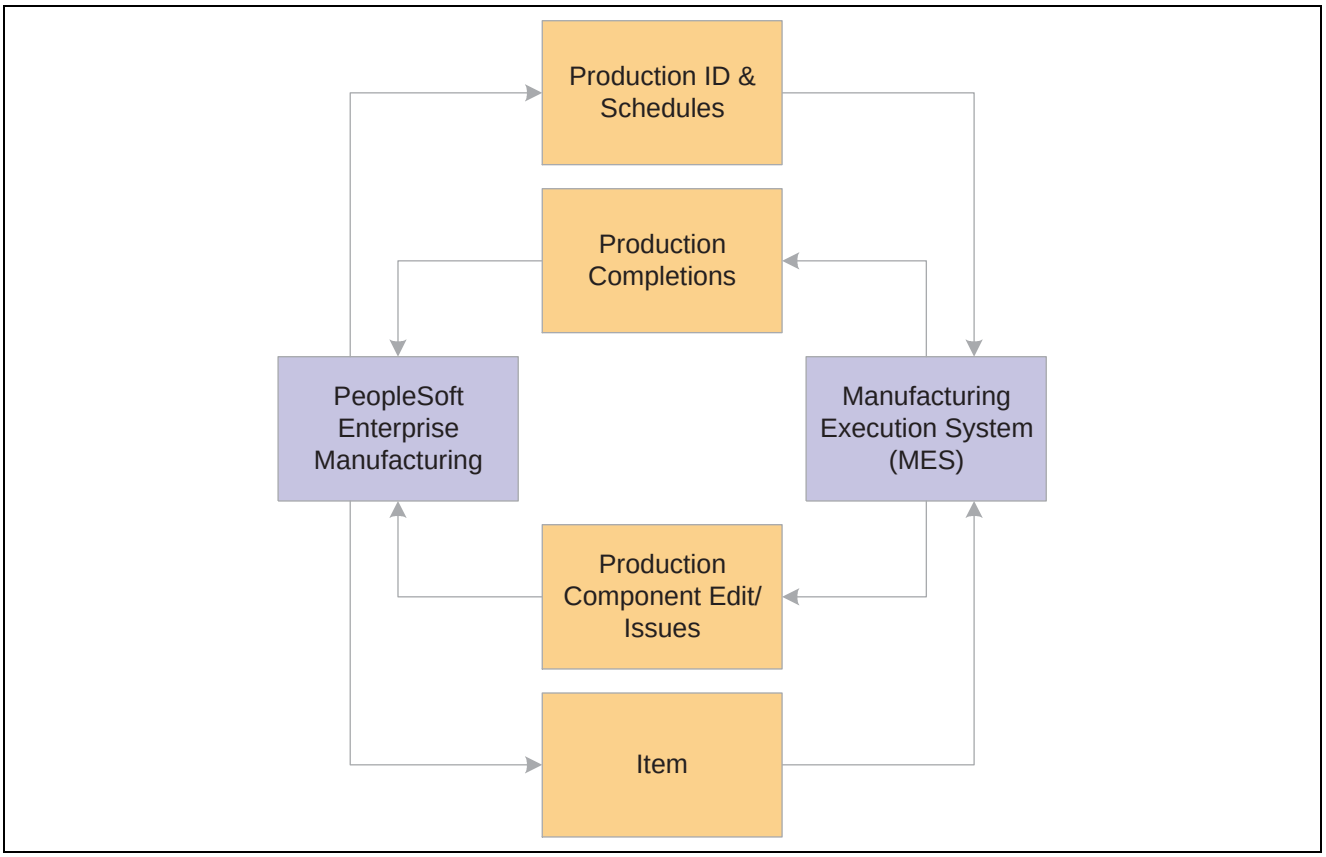

Manufacturing Execution System Data Flow

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 Firmed 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 Enterprise Supply Chain Management Integration 9.0 PeopleBook*, "Understanding SCM Integration".

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.

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See Chapter 8, “Maintaining Bills of Material,” page 89.

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 311.

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 517.

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 455.

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, “Processing Enterprise Integration Points (EIPs)”

Integrating with Product Life Cycle Management Applications

By using PeopleSoft Manufacturing, you can send item, revision, and manufacturing bill of material (BOM) information using product life cycle management applications.

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

See Chapter 6, “Integrating Oracle’s PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML,” page 59.

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CHAPTER 6

Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML

This chapter provides overviews of the integration of PeopleSoft Manufacturing to Product Life Cycle Management (PLM) applications and discusses how to:

- Set up PeopleSoft Manufacturing for use with the integration.
- Run the PeopleSoft integration.
- Review and correct PDX change order exceptions.
- Review important implementer and end-user guidelines.

Understanding the PDX Integration

You can use PeopleSoft Manufacturing to receive item, revision, and manufacturing bill of material (BOM) information from external applications. This integration uses the product data exchange (PDX) version 1.0 XML format.

Note. The term *PDX* refers to the XML files containing change order information that is sent from the product life cycle management application to PeopleSoft.

See Also

Chapter 6, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML," Reviewing and Correcting Change Order Exceptions, page 72

Chapter 6, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML," Reviewing Important Implementer and End-User Guidelines, page 78

Overview the PeopleSoft Product Data Exchange Integration

PeopleSoft Manufacturing integrates with PLM applications enabling you to send item, revision, and manufacturing BOM information using change orders.

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

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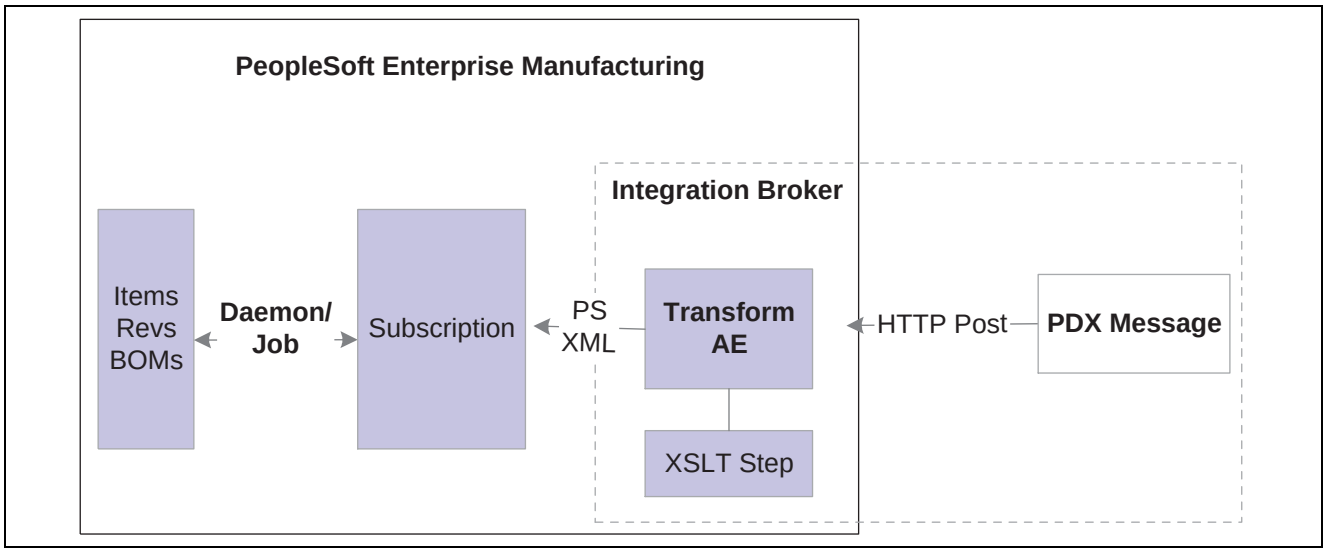
In general, implementing a PLM integration implies that the PLM system is the master data source for items, revisions, and BOMs instead of PeopleSoft. Therefore, when this integration is implemented, use PeopleTools security to severely restrict access (disallow changes) to item, revision, and BOM maintenance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



Integrating PeopleSoft Manufacturing with PDX

Overview of Required Setup and Considerations for Integration

This section discusses:

- PeopleSoft Manufacturing.
- The integration checklist.

PeopleSoft Manufacturing

Once you have defined usage of a valid Life Cycle status within the product life cycle management application, you can then set up PeopleSoft Manufacturing by defining default and mapping information within the Installations Options - Manufacturing page. These mappings look for custom fields in the XML as a system such as Agile™ would write them within the PDX 1.0 standard.

In addition, certain PeopleSoft Integration Broker and messaging information is also required, which enables PeopleSoft to receive the — service operation 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 service operations) for items and BOMs sent in PDX format into PeopleSoft master tables.

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Integration Checklist

Use this checklist is useful to configure the PDX integration.

PeopleSoft Manufacturing

PeopleSoft 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 in standard PDX 1.0 XML.	(Yes or No)
2. Set up the PeopleSoft messaging gateway.	Activate service operations — for services BOM_SYNC and ITEM_SYNC The service operation version itself has a status and there is an individual status for each handler and routing.	(Yes or No)
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 service operations as they are received. This is important for the integration to control the flow and updating of change orders.	(Yes or No)
4. Set up the PDX Alert and PDX_DMON Daemon group for processing inbound service operations.	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. 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 service operations and start the PDX_JOB when needed.	(Yes or No)

Prerequisites

Prior to integrating PDX with PeopleSoft Manufacturing, you must first install:

- PeopleSoft Manufacturing software.

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- PeopleSoft Integration Broker gateway supporting inbound service operations for the manufacturing installation.

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

Setting Up PeopleSoft Manufacturing for Use with a Product Life Cycle Management Application

These are the high-level steps that you must follow to set up the PeopleSoft system:

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

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

   While areas that pertain to the service operations are contained in this document, basic understanding of setting up and using PeopleSoft gateway and service configuration is assumed.
3. Define a Daemon group for the PeopleSoft Process Scheduler to manage the processing of inbound items, revisions, and BOMs received by using PDX service operations.

The table in the next section contains a general list of the pages used to set up PeopleSoft Manufacturing to integrate with a life cycle management application. 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

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine

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Pages Used to Set Up PeopleSoft Manufacturing to Integrate with a Product Life Cycle Management Application

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 third-party application user-defined field name.
Service Operations - General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations	Review and edit service operations for the PDX integration.
Service Operation References	IB_MESSAGE_SO_SEC	PeopleTools, Integration Broker, Integration Setup, Messages Click the Service Operation References link on the Message Definition page.	View associated service operations.
Routing Definitions, Service Operations - Routings	IB_ROUTINGDEFN, IB_SERVICERTNGS	• PeopleTools, Integration Broker, Integration Setup, Routings Select the *BOM_SYNC_PDX* value for the routing name. • PeopleTools, Integration Broker, Integration Setup, Service Operations Select the *BOM_SYNC* value for the service operation, and click the Routings tab. Click the Selected check box for the BOM_SYNC_PDX routing.	Activate the routing. **Important!** You must activate the BOM_SYNC_PDX and ITEM_SYNC_PDX routings.
Gateway	IB_GATEWAY	PeopleTools, Integration Broker, Configuration, Gateways	**Note.** Setup required. Set up the PeopleSoft messaging gateway.

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Page Name	Object Name	Navigation	Usage
Daemon Group	AE_DAEMON	PeopleTools, Process Scheduler, Daemon Group	**Note.** Setup required. Create a Daemon group with the program name PDX_DMON, which is a delivered application engine program. This page controls the sequential processing of imported 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 the 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 service operations for items, revisions, and BOMs in the Data Maintenance component.
Item Loader	RUN_IN_ITMLOAD	SCM Integrations, 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 items. **Important!** The PDX_CONTROL program (the first program in the PDXJOB) requires the use of a run control ID to be named *PDX*.

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Page Name	Object Name	Navigation	Usage
BOM Loader	EN_RUN_BOMSTAGE	SCM Integrations, 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. **Important!** The PDX_CONTROL program requires the use of a run control ID to be named *PDX*.
Data Maint Setup1	EO_EIP_CTL_SETUP1	Enterprise Components, Integration Definitions, Data Management Utility, Data Maintenance 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 PDX job, so that it can be processed independently from the item and BOM loading processes.

Setting Up PDX Installation for Integration

Access the Installation Options - Manufacturing page.

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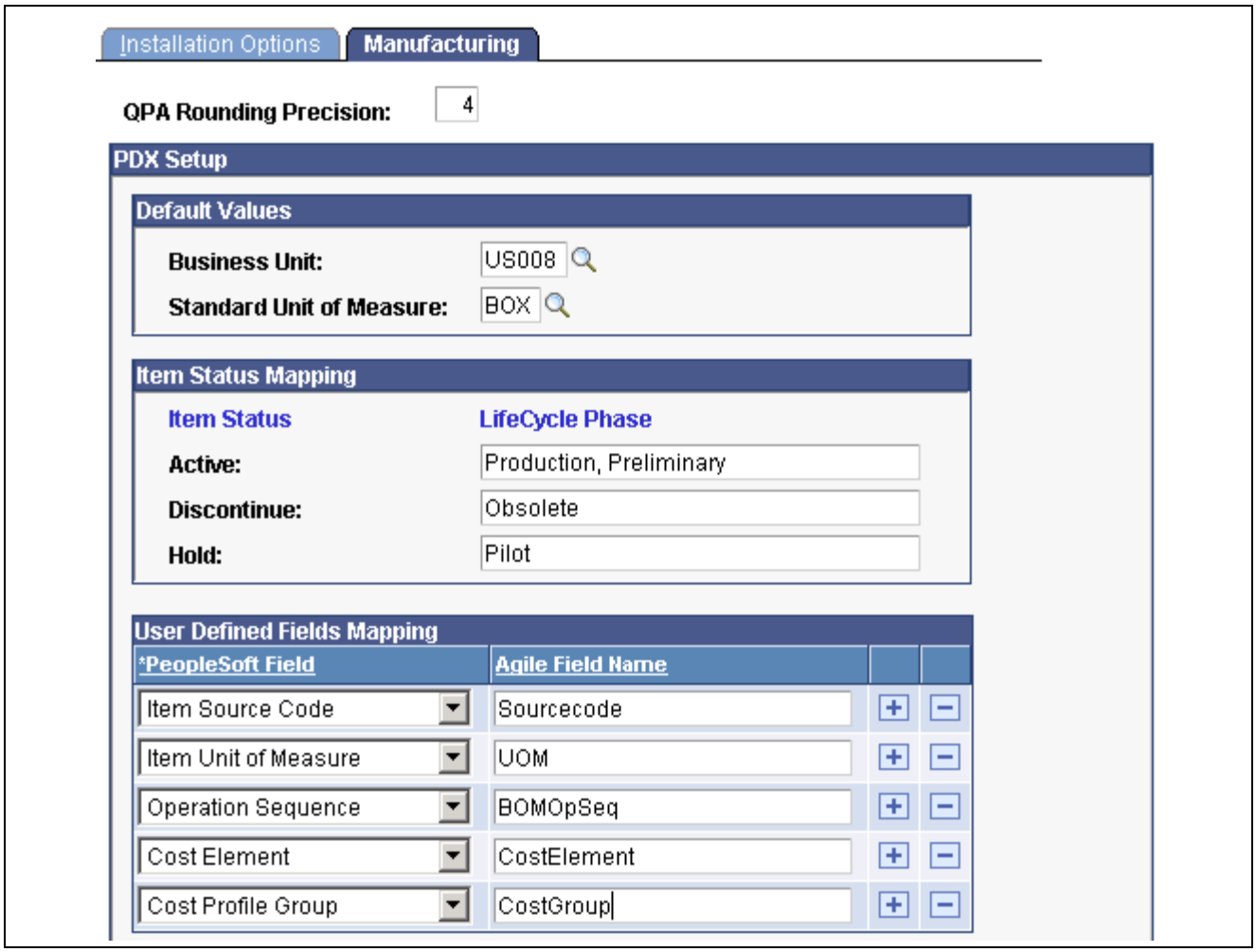

Installation Options - Manufacturing page

PDX Defaults

Business Unit Select the value for the Manufacturing business unit that is to be assigned for changes received.

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 (such as EA).

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 a change order. Therefore, any valid 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 the PLM. For example, the

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previous screenshot shows how the 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 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 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 a change order to specify future obsolescence of the item by having an 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

PDX 1.0 supports user-defined fields within it. In version 1.0 of PDX, the Item Source Code and Unit of Measure are not standard fields. Some life cycle management systems (such as Agile™) will automatically populate custom attributes of the XML when you define these fields within the PLM system. If this is the case, you can use this group box to define additional mappings for the integration to reduce configuration. Item Source Code and Unit of Measure are required fields for PeopleSoft.

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)

For example if you are using Agile™ 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 service operations required to enable inbound messaging for PDX 1.0.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Working with Items," Managing Inventory by Item Status

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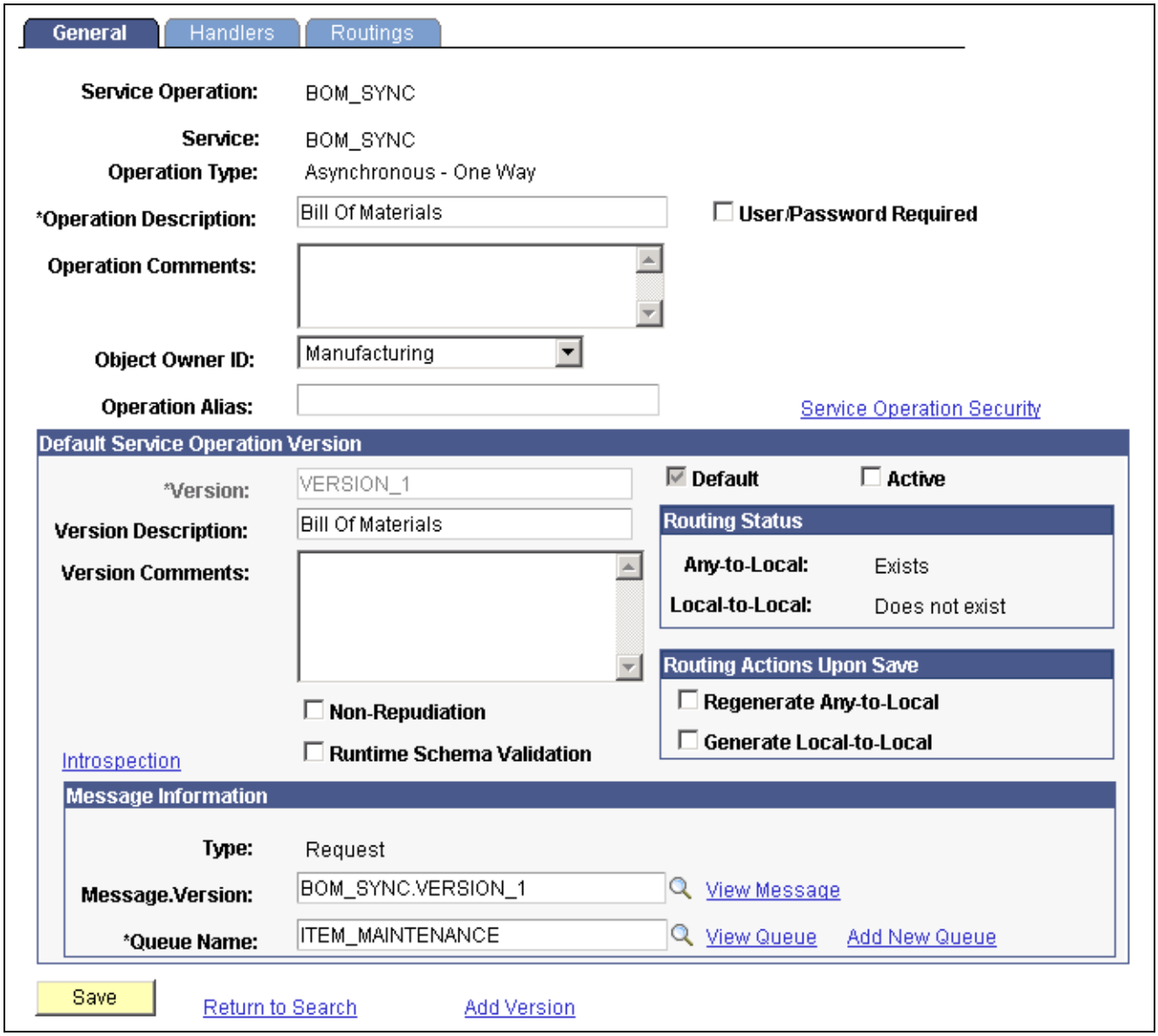
Viewing Service Operations

Access the Service Operations - General page.



Service Operations - General page

Review or edit general information such as service and operation type, handlers, and routings associated with the BOM_SYNC and ITEM_SYNC service operations.

Activating Routings

Access the Routing Definitions page or the Service Operations - Routings page.

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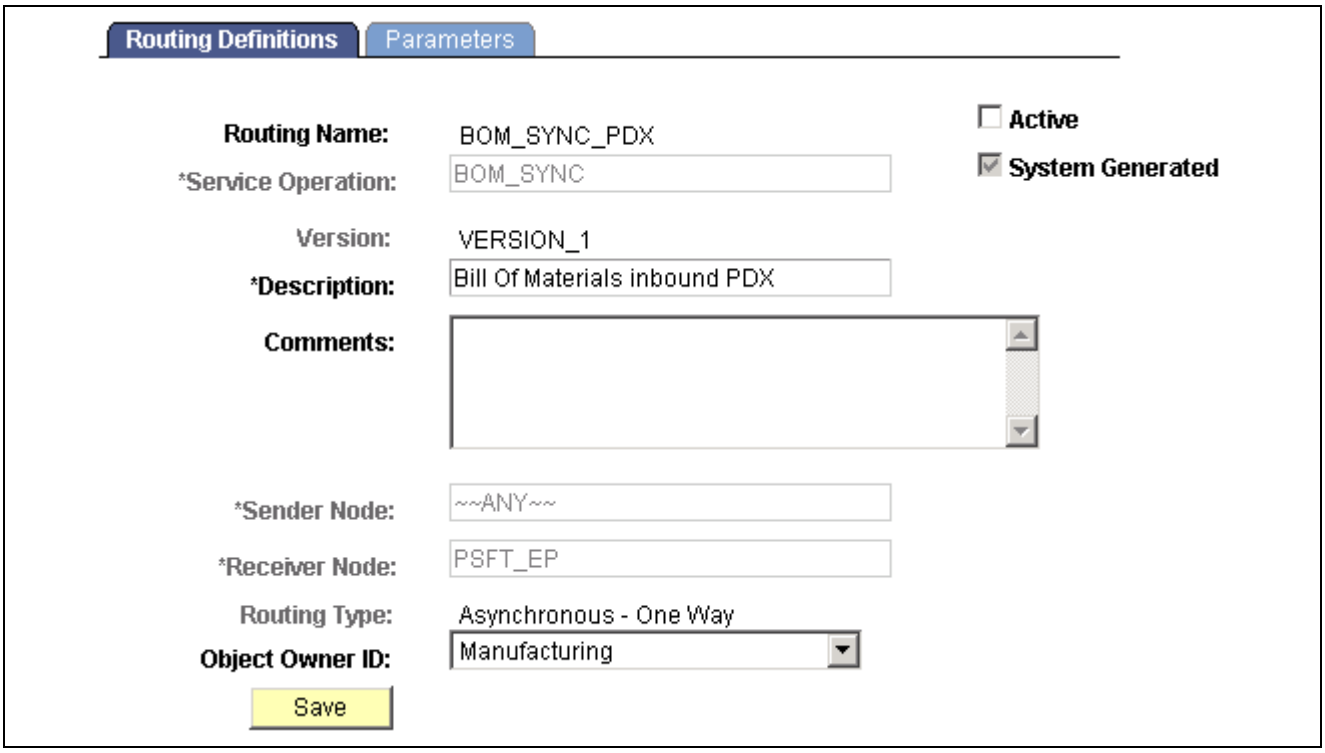

Routing Definitions page

Active Select this check box.

Save Click this button to save your changes and activate the routing.

Important! You must activate the BOM_SYNC_PDX and ITEM_SYNC_PDX routings.

If you are activating the routings by using the Service Operations - Routings page:

1. Select the check box for the BOM_SYNC_PDX routing definition.
2. Click the Activate Selected Routings button.

   The routing Status changes to *Active.*
3. Click the Save button.

Perform these same steps for the ITEM_SYNC service operation and ITEM_SYNC_PDX routing.

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 service operations into PeopleSoft master tables (after the change has been sent).

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 the PLM by initiating the PDXJOB when necessary. The PDXJOB then drives the processes to ensure that one inbound transaction (from a PDX service operation) is treated collectively and processed sequentially through the Item Loader (IN_ITMLOAD) and BOM Loader (EN_BOM_MSG) processes as part of the PDXJOB.

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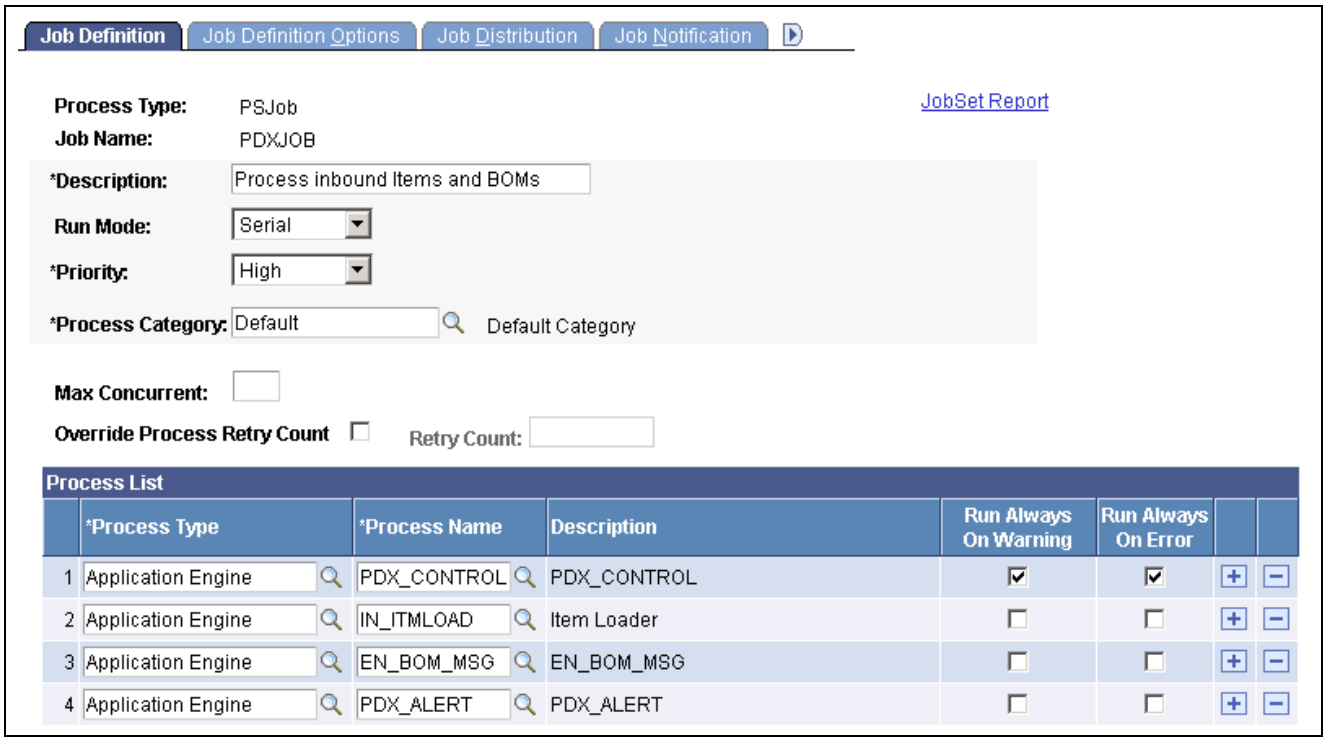
In addition, the PDXJOB includes an Alert process (PDXALERT) which notifies you of any processing errors.

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



Job Description page

See Step 2.

The processing sequence is very important when 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 when the service operation is processed

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 data from being processed immediately and allows the PDX information to be properly staged for processing in PeopleSoft

       Clearing this check box provides greater reliability of the 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 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.

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Note. If you have other ongoing uses of the ITEM_SYNC service operation outside of the integration, the setting of this flag may have an impact on those non-PLM 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 the 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 by incoming transaction. 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 PDX transactions that are ready to be processed. This ensures that all items for the same transaction are ready to be processed with the BOMs being sent.

   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 PDXJOB initiated by the PeopleSoft Daemon. Each time a 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 PDXJOB process.

   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. Access the Role Definition page (PeopleTools, Security, Permissions and Roles, Roles).
   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 *Enterprise PeopleTools 8.48 PeopleBook: Security Administration*

4. Access the PDX Alerts page (SCM Integrations, Transaction Error Handling, PDX Alerts).
   a. Create a run control ID that is to be used for each run of this utility.

   b. Enter the role name created in step 3a.

      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.

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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 service operation 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.

5. Access the Daemon Group page and set up the Daemon group.

a. Create a Daemon group named *PDXDMON*.

b. Add the program name *PDX_DMON* to the Daemon group.

PDX_DMON 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 service operations to be monitored without the overhead of starting a job to check each time.

6. 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 *PDXDMON* 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

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine

Reviewing and Correcting Change Order Exceptions

This section provides an overview of change order exceptions, and discusses how to:

- View change order exceptions.
- View PDX change order exceptions error details.
- View completed change order exception errors.

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- Correct change order errors.

Overview of Change Order Exceptions

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 Manufacturing system:

1. Service operations are posted to the PeopleSoft service operation gateway (PDX_MSG), which contains the PDX change order data.

   The PDX service operation is processed. It is translated and subscribed to as ITEM_SYNC and BOM_SYNC service operations.

2. Item sync and BOM sync service handlers write results to new entries by transaction (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 transaction). This job processes the earliest transactions in the system 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 ECO numbers containing Revision information. If the PDX sent 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 Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML," Viewing Change Order Exceptions, page 74

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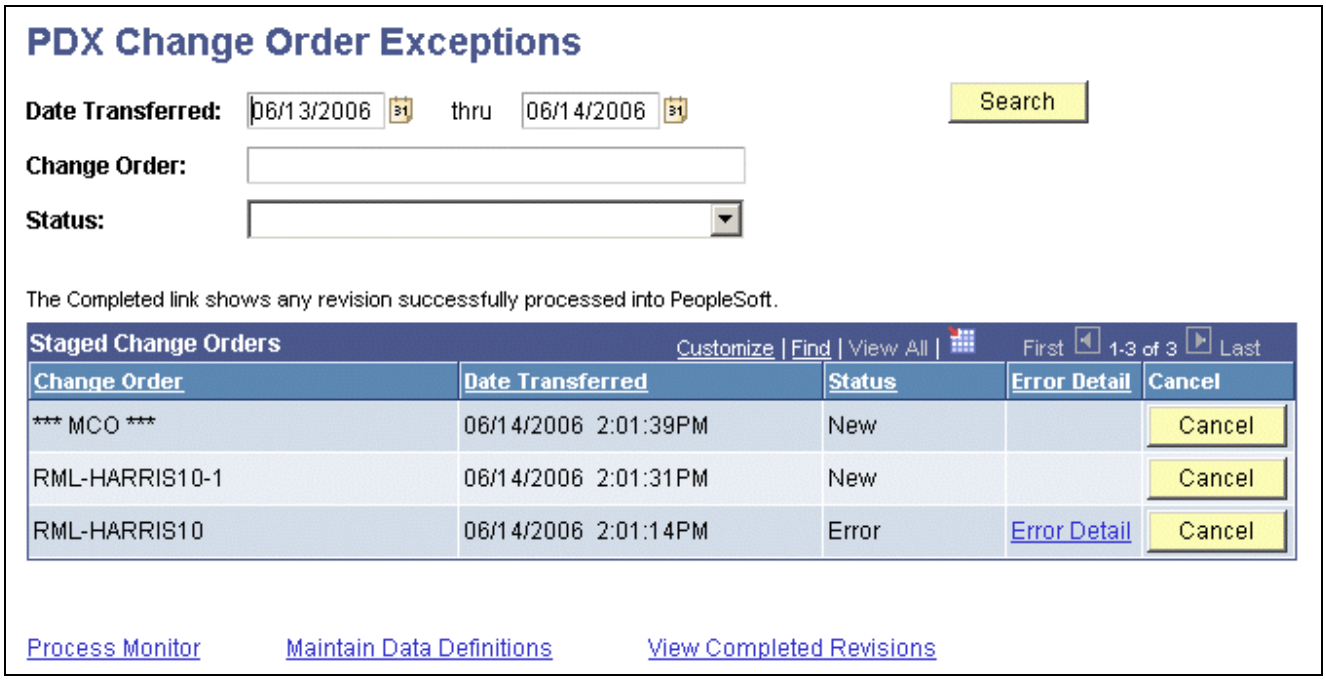
Pages Used to Review and Correct PDX Change Order Exceptions

Page Name	Object Name	Navigation	Usage
PDX Change Order Exceptions	EN_PDXECO_EXCP	SCM Integrations, 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 roles.
PDX Alerts	EN_PDX_ALERT_RUN	SCM Integrations, 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 page

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

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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. 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 the PeopleSoft Manufacturing system.

Viewing PDX Change Order Exceptions Error Details

Access the PDX Change Order Exceptions - Error Detail page.

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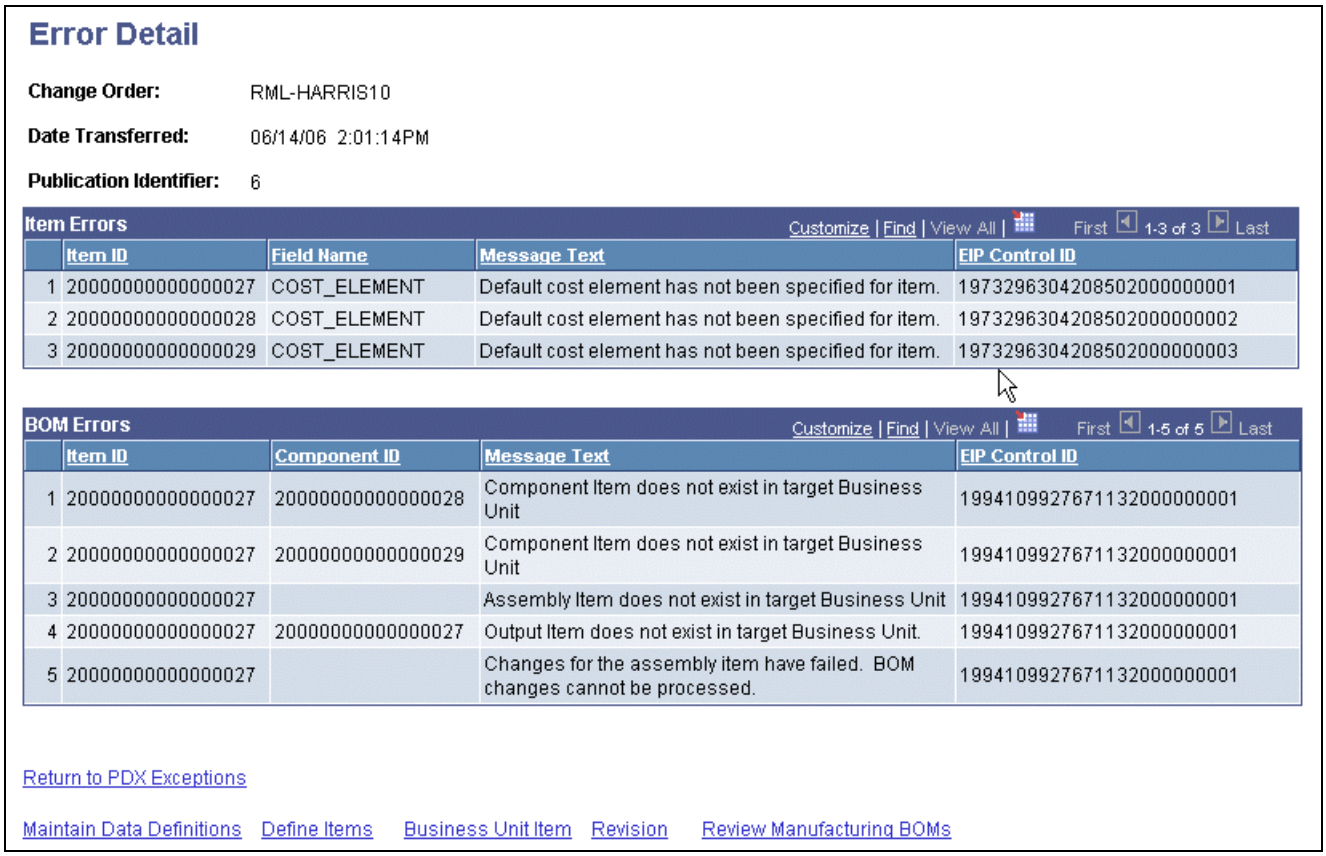

Error Detail

Change Order: RML-HARRIS10

Date Transferred: 06/14/06 2:01:14PM

Publication Identifier: 6

Item Errors Customize | Find | View All | First 1-3 of 3 Last

	Item ID	Field Name	Message Text	EIP Control ID
1	20000000000000027	COST_ELEMENT	Default cost element has not been specified for item.	19732963042085020000000001
2	20000000000000028	COST_ELEMENT	Default cost element has not been specified for item.	19732963042085020000000002
3	20000000000000029	COST_ELEMENT	Default cost element has not been specified for item.	19732963042085020000000003

BOM Errors Customize | Find | View All | First 1-5 of 5 Last

	Item ID	Component ID	Message Text	EIP Control ID
1	20000000000000027	20000000000000028	Component Item does not exist in target Business Unit	19941099276711320000000001
2	20000000000000027	20000000000000029	Component Item does not exist in target Business Unit	19941099276711320000000001
3	20000000000000027		Assembly Item does not exist in target Business Unit	19941099276711320000000001
4	20000000000000027	20000000000000027	Output Item does not exist in target Business Unit.	19941099276711320000000001
5	20000000000000027		Changes for the assembly item have failed. BOM changes cannot be processed.	19941099276711320000000001

Return to PDX Exceptions

Maintain Data Definitions Define Items Business Unit Item Revision Review Manufacturing BOMs

Error Detail page

Viewing Completed Change Order Exception Errors

Access the Completed by Change Order page.

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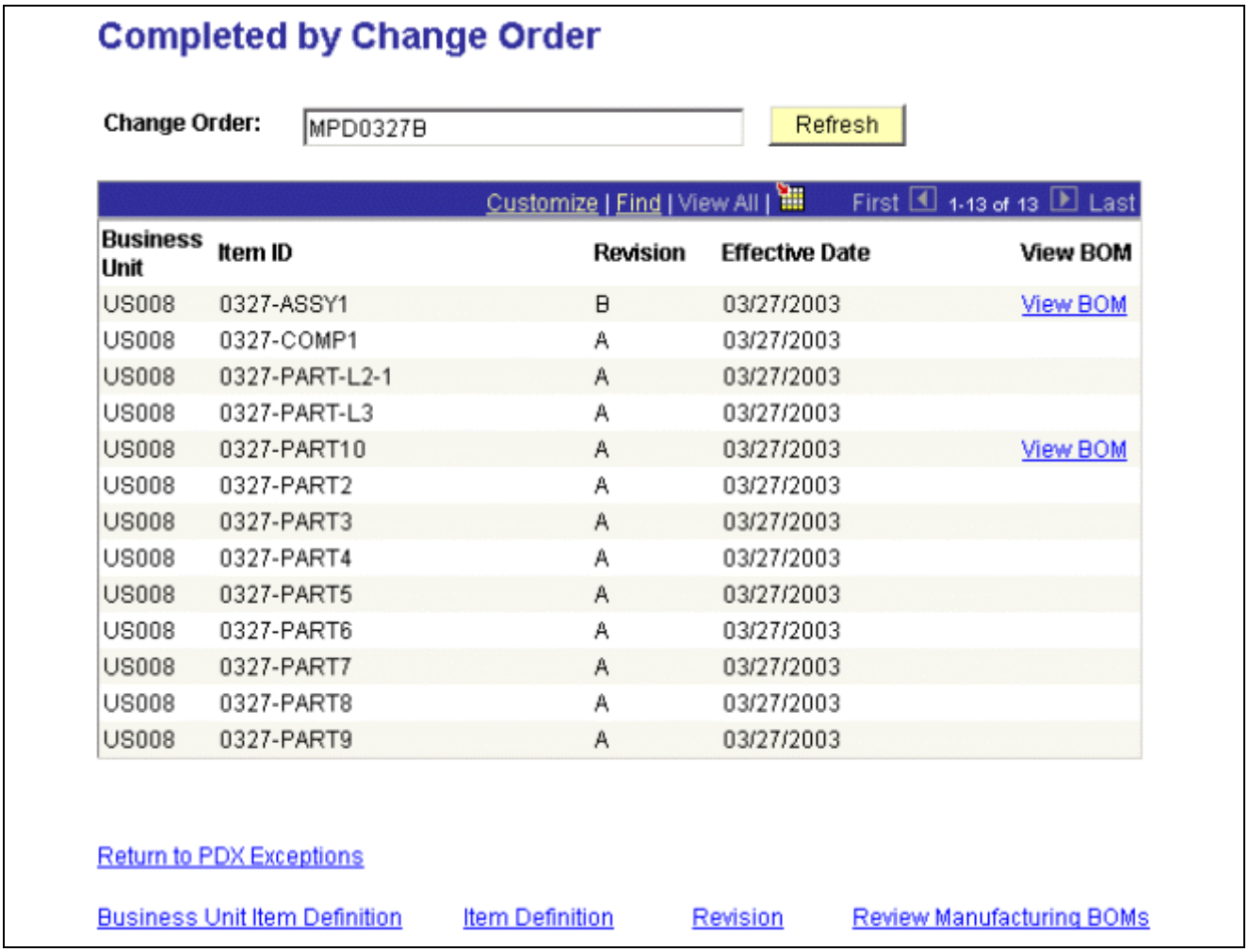

Completed by Change Order

Change Order: MPD0327B Refresh

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 change order number within the Revision and BOM additional text fields.

Correcting Change Order Errors

It is highly recommended that when there is a BOM processing (data entry) error the error should be corrected within the product life cycle management system and the change order resent 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.

Note. Cancel the change order first in PeopleSoft so that subsequent sends 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 by adding the third component, and resending the change order to PeopleSoft is a preferred method of correction.

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Data Entry Errors

BOM error Missing required component item in the affected items of the change order 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 change order, changing the markup, and resending the same change order to PeopleSoft is not allowed. Doing so causes both systems 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 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 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 the integration success. This is most notably due to subtle functional differences between the two systems.

Here are some important guidelines to help with the integration:

- Determine transaction size, volume, and frequency.

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The typical size and volume of the change orders determines how often and how much to process through the PeopleSoft within a single PDX file. Care should be taken to reduce the chance of extremely large files (files over 8 megabytes not recommended). PeopleSoft recommends sending more PDX files with smaller numbers of change orders more frequently rather than very large files containing volumes of changes with less frequency.

Schedule the PDX Daemon (PDXDMON) within PeopleSoft to compliment the 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 the 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.

- 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 the PLM, 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.

- Define field lengths and required fields in the PLM.

  This is critical to the reliability of the integration to ensure that all PeopleSoft required 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.

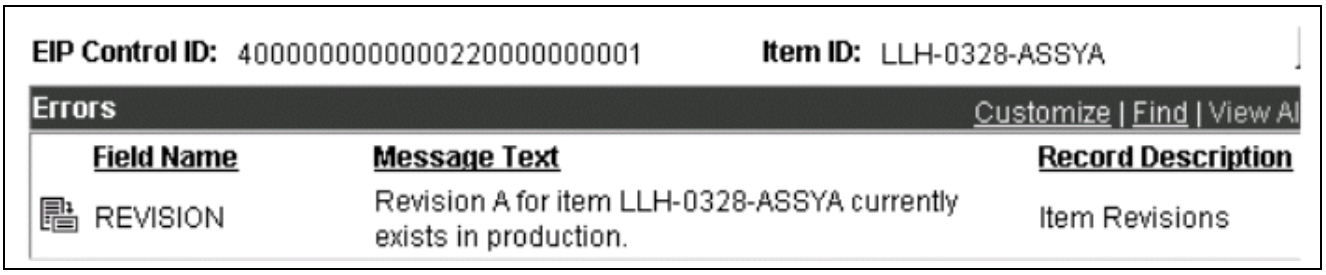
- Use caution regarding processing multiple revisions for an item in one day.

  The PeopleSoft Manufacturing revision scheme supports only one revision per day. Some environments may require that multiple revisions be released for the same item in one day. If this occurs in the 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 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, 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.



Change order error in PeopleSoft due to multiple revisions during one day

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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 the PeopleSoft system.

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PART 2

Maintaining Bills and Routings

Chapter 7
Understanding PeopleSoft Bills of Material and Routings

Chapter 8
Maintaining Bills of Material

Chapter 9
Making Mass BOM Changes

Chapter 10
Displaying Bills of Material

Chapter 11
Defining Resources

Chapter 12
Defining Work Centers

Chapter 13
Maintaining Tasks

Chapter 14
Structuring Routings

Chapter 15
Defining Production Options

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.

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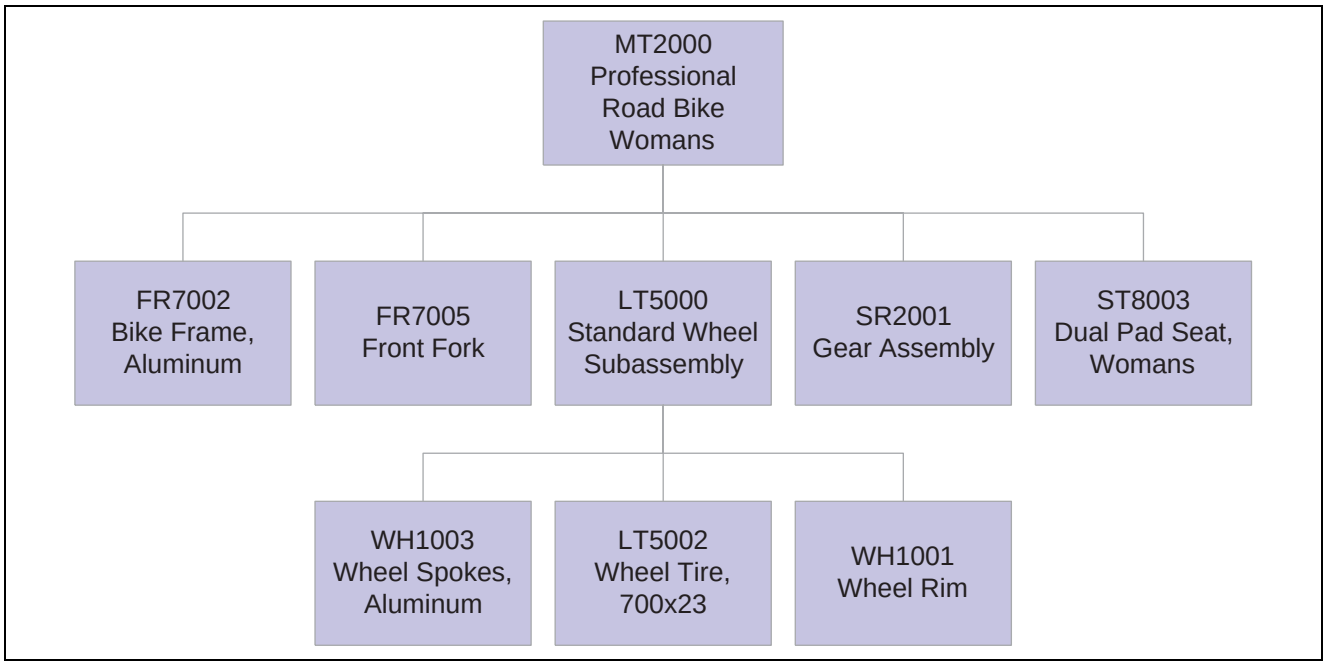

BOM Structure Example

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.

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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 89

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 the production environment. With PeopleSoft Engineering, you can manage and develop EBOMs without impacting the 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 Enterprise Engineering 9.0 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 Enterprise Supply Planning PeopleBook

Importing Bills of Material from External Sources

With the PeopleSoft Bill of Material EIP (BOM_SYNC) and Item Master EIP (ITEM_FULLSYNC), you can:

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- 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 the 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.

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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 253

Chapter 14, "Structuring Routings," page 221

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.

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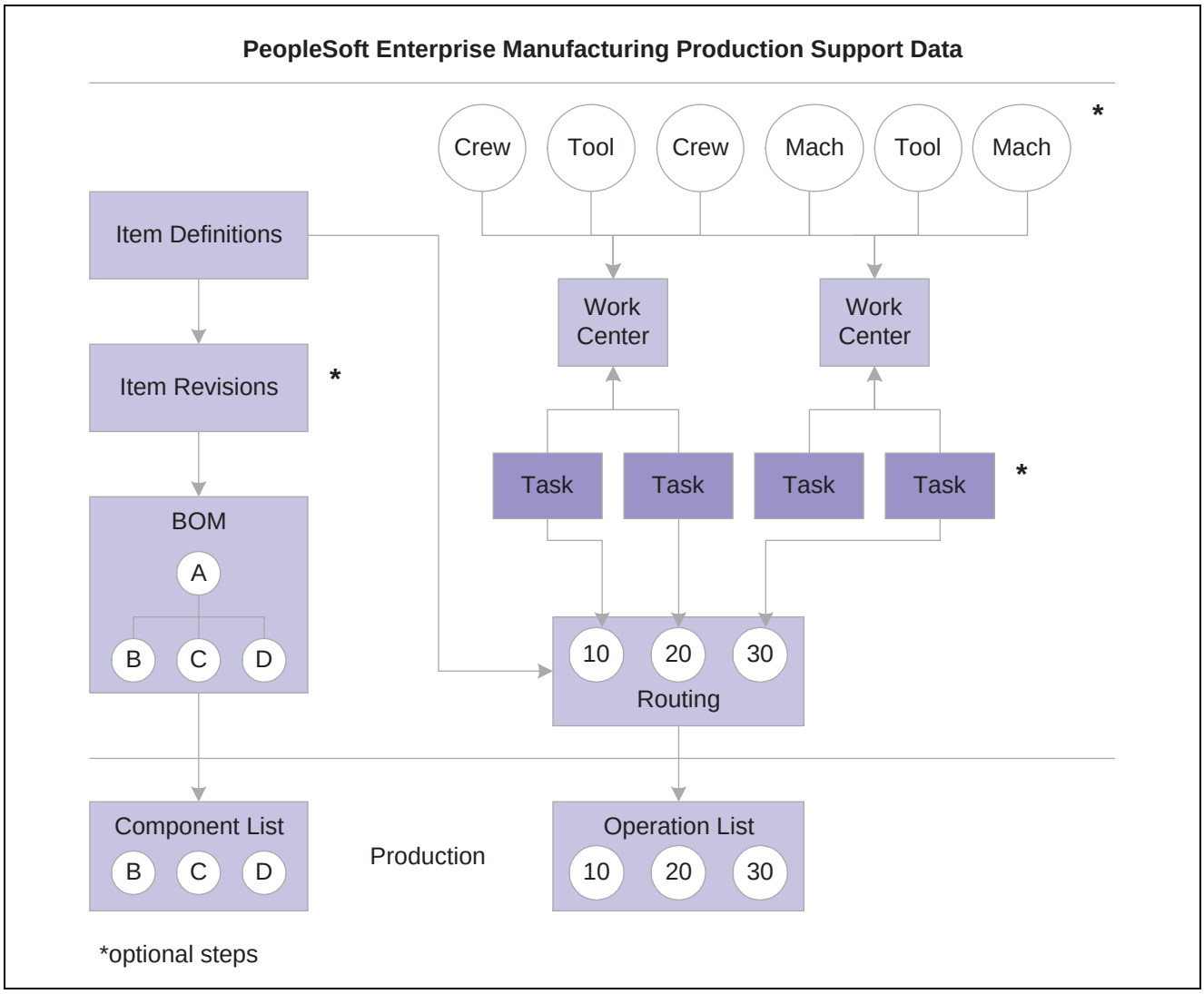

PeopleSoft Manufacturing production support data

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CHAPTER 8

Maintaining Bills of Material

This chapter provides an overview of bill of material (BOM) maintenance and discusses how to:

- Define BOM items.
- Maintain BOMs by revisions or effectivity dates.
- Maintain revisions.
- Maintain BOMs.

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 must address.

Prerequisites

Before you begin defining and maintaining BOMs, you must:

1. Add items.
2. Decide how to maintain BOMs for assembly items (by effectivity date or by revision).
3. Decide whether to verify BOMs online, and define manufacturing BOM default settings, including component revision default settings.
4. (Optional) Maintain revisions.
5. If you have a standard rework process that involves adding components, determine whether you need to create rework BOMs.
6. Consider the differences between single-output BOMs and multiple-output BOMs.
7. (Optional) Assign associated primary BOMs when you define multiple outputs.
8. Specify the calculated BOM quantity per assembly (QPA) precision.

In addition, to access the Revision Documents page, the Assembly Documents page, and the Component Documents page, you need to have PeopleSoft Engineering installed along with its Documentum functionality. Select Set Up Financials/Supply Chain, Common Definitions, Documentum to access the Documentum Component Options page, where you can specify the function buttons that are available on the document-enabled pages.

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If you have enabled PeopleSoft Workflow, when a 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 Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Document Management Options

Chapter 6, "Integrating Oracle's PeopleSoft Manufacturing with Product Life Cycle Management Applications Using PDX 1.0 XML," page 59

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

Common Elements Used in This Chapter

BOM Type Select the type of BOM that you are creating. Values are:

- *Production:* BOM is used as the basis for manufacturing assemblies or end items.
- *Rework:* BOM is a rework BOM, which you can create if you have a standard rework process that involves including 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 (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. Although you can add BOMs for both manufactured and purchased items, the system uses only a manufactured item's BOM for planning and cost management purposes. Therefore, to correctly plan for items that 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 the Standard Cost option as the costing method in PeopleSoft Inventory. The components can be either owned or non-owned, and they can be either inventory or expensed items. In addition, you cannot control or manage the items using staged dates. Except for planning BOMs, you can add production and rework BOMs only for an item that is approved and defined as an inventory item with the source code *Make, Buy, Floor Stock,* or *Expense.*

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See Also

Chapter 2, "Understanding PeopleSoft Manufacturing," Item Substitution, page 23

Chapter 8, "Maintaining Bills of Material," Adding Substitute Components, page 121

PeopleSoft Enterprise Cost Management 9.0 PeopleBook, "Structuring Your Cost Management System"

Maintaining BOMs by Revisions or Effectivity Dates

When you define the assembly items by using the BOM Usage Defaulting group box on the MFG Business Unit Options page (manufacturing business unit options page), you determine if you will manage the BOMs using revisions. If you use 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 do not 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 checks to see which revision is in effect on the date specified.

Note. All general attributes that you set with this page apply to both engineering and manufacturing BOMs.

This section discusses how to:

- Set options for maintaining BOMs.
- Create rework BOMs.
- Use multiple-output BOMs.
- Assign associated primary 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.

Setting Options for Maintaining BOMs

Access the MFG Business Unit Options page.

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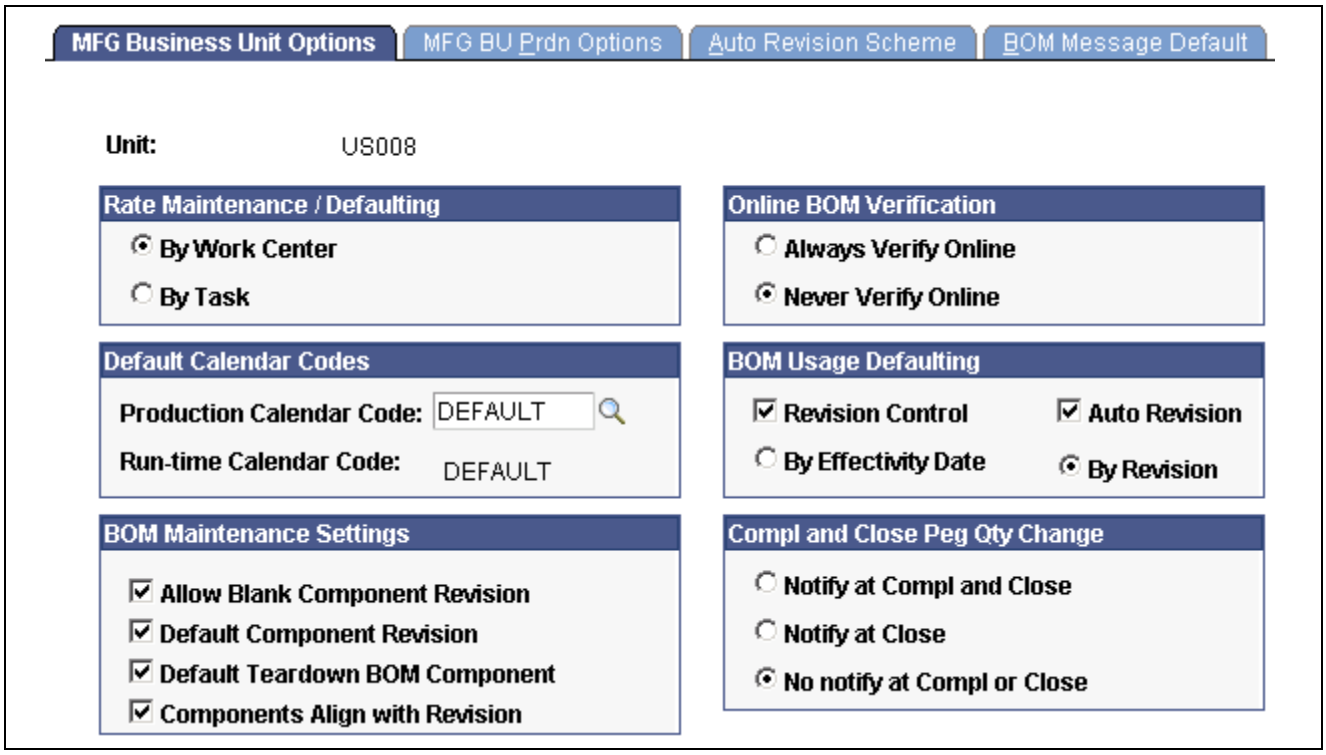

MFG Business Unit Options page

Always Verify Online Select to run the loop-checking process online during BOM maintenance.

Never Verify Online Select to bypass the loop-checking process online during BOM maintenance; you can run the verification as a deferred process.

If you change the online BOM verification from Always Verify Online to Never Verify Online, you must run the batch BOM verification to ensure that no looping BOMs exist.

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

BOM Usage Defaulting

Revision Control Select to control items by revisions. If you select this option and BOMs exist for the assembly item, the dates for the components specified in the BOMs typically must 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 do not 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. You cannot maintain planning and expense items by revision.

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Auto Revision

If you select 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 has revisions created automatically, you can use 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 creates revisions only for items that have both revision control and automatic revision selected. When automatic revisions are not used in the mass maintenance process, the process functions as a regular mass maintenance process.

Note. If you do not select Revision Control and then you later decide to maintain BOMs by revisions after you have already created 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 require that all component changes are tied to the start date of a specific revision. You can clear the Revision Control option without deleting any revisions for the item.

By Effectivity Date

Select to have the system maintain BOMs for revision-controlled items by dates related to revisions. Enter dates on which assembly product structure components are in effect when maintaining BOMs using the Manufacturing BOMs Summary page, the Component page, and the Substitute Item page. The system validates these dates so that they align with item revision dates if you have select the Components Align with Revision setting on the MFG Business Unit Options page.

By Revision

Select to have the system maintain BOMs for revision-controlled items by revision rather than date. You can associate effective and obsolete revisions with components using the Manufacturing BOMs page and the Component page.

Note. Even if you clear the Components Align with Revision option on the MFG Business Unit Options page, you can select the By Revision option for a particular assembly item to require that the assembly has all components align with one of its revisions because maintaining by date is not allowed.

Warning! For component items that you want to use up (or 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's online BOM verification.

See Chapter 3, "Defining Your Business Unit Structure," Setting Up Manufacturing Business Unit Options, page 32.

BOM Maintenance Defaulting

When you set up 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.

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You can use the Allow Blank Component Revision check box and the Default Component Revision check box to define component revision default settings that affect the Manufacturing BOMs component. These two fields apply only to revision-controlled items. Furthermore, they operate independently of each other; consequently, there are four possible combinations of settings. This table describes the four combinations:

Allow Blank Component Revision Setting	Default Component Revision Setting	What It Means
Cleared	Cleared	When you maintain BOMs, you must enter a revision for any component that's revision-controlled. The system does not insert any default component revisions. The inquiries display what you enter on the maintenance pages.
Selected	Cleared	When you maintain BOMs, you can leave component revisions blank or select a revision for the component. The system does not provide a default value. The inquiries check the appropriate assembly effectivity dates and display component revisions based on the date for which the inquiry is performed. The BOM inquiries check the selected assembly, end item effectivity date, and revision, and the system displays the component's corresponding revision based on the date selected. This is the default setting combination for any business unit.

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Allow Blank Component Revision Setting	Default Component Revision Setting	What It Means
Cleared	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 is blank.

See Also

Chapter 8, "Maintaining Bills of Material," Defining and Maintaining Revisions, page 97

Chapter 8, "Maintaining Bills of Material," Verifying BOMs, page 128

Creating Rework BOMs

If you use a standard rework process that involves adding components, decide whether you want to create rework BOMs. You can define a primary rework BOM and up to 98 alternates by using BOM codes.

Using Multiple-Output BOMs

There are some conceptual differences between single-output BOMs (with one primary item) and multiple-output BOMs (with 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 system applies the component's quantity per assembly or per order. If the BOM quantity is greater than one, enter the component quantity in terms of the BOM quantity. If set to *1,* 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 plan to make only a certain quantity of an item at a time.

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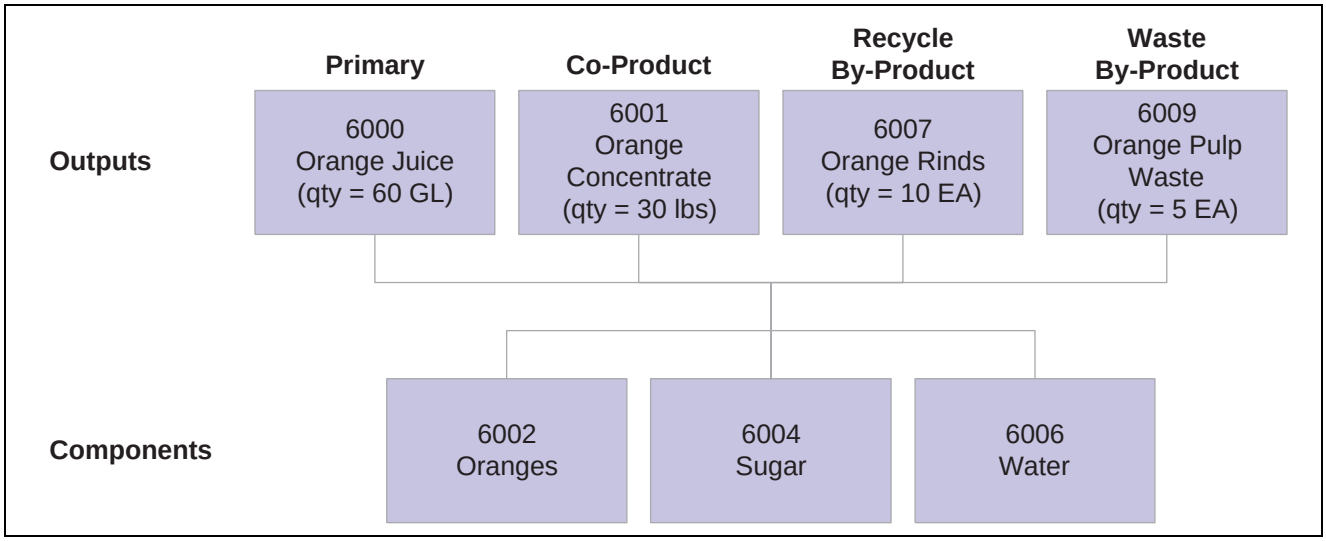
Multiple-Output BOMs

When multiple outputs are defined for a BOM, you indicate that:

- At least two end items are generated during production, and one of the items is the primary item.
- The item ID specified for the BOM represents a batch item, as well as the primary item.

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

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. In this example, 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; that is, an item can be a co-product on more than one item's primary BOM. By assigning an associated primary BOM to a co-product, you can indicate which BOM the system use in when exploding the co-product to the next level.

In this example, B is a co-product in two different processes:

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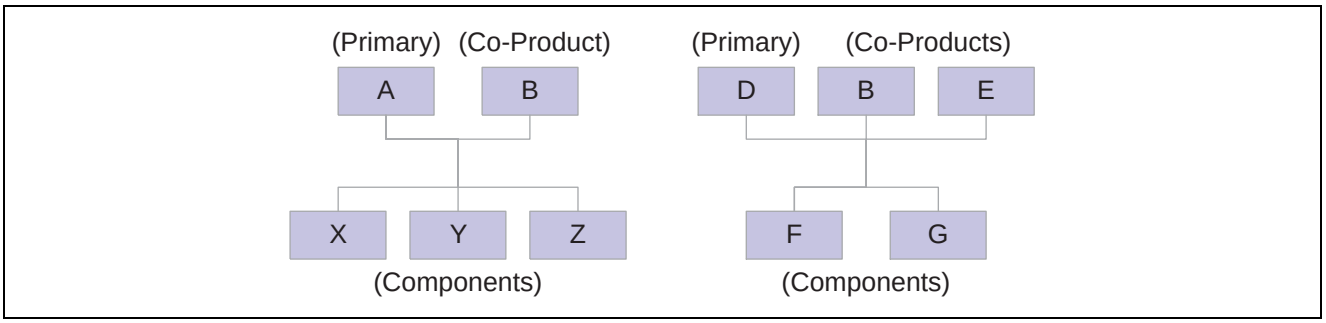

Assignment of associated primary BOMs

In the first structure, A is the primary item; B is the co-product; and X, Y, and Z are the components. In the second structure, D is the primary item; B and E are co-products; and F and G are the components. Because 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 item. 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 item defined for the item. If there is an associated primary item, the system uses its BOM code *1* to explode to lower levels.

Note. Although 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 precision. This is especially important when you use 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 four places to the right of the decimal point.

However, the system calculates the quantity per by dividing the entered quantity per by the BOM quantity, and it uses the precision that is defined on the Manufacturing page. For example, if a calculated QPA results in 6.54321 and the QPA setting is set to four places, the system uses the value 6.5432.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting Manufacturing Installation Options

Defining and Maintaining Revisions

To create and maintain BOMs by revisions, use the REV Maintenance component (EN_REVISION).

You can maintain revisions; for example, you can define codes and the dates that the revisions become effective. You can also attach text, documents, and other files to revisions.

By defining revision codes, you determine the specific dates that revisions become effective. Therefore, before you maintain BOMs by revisions, you must define the revision codes. Additionally, to reference revisions for a component on a BOM, you must first define the component's revisions.

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Note. Instead of predefining revision codes, you can generate revisions automatically. This feature, however, is available only through the BOM Mass Maintenance process.

See Also

Chapter 9, "Making Mass BOM Changes," page 133

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 that 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 document management system that is embedded in the PeopleSoft 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.

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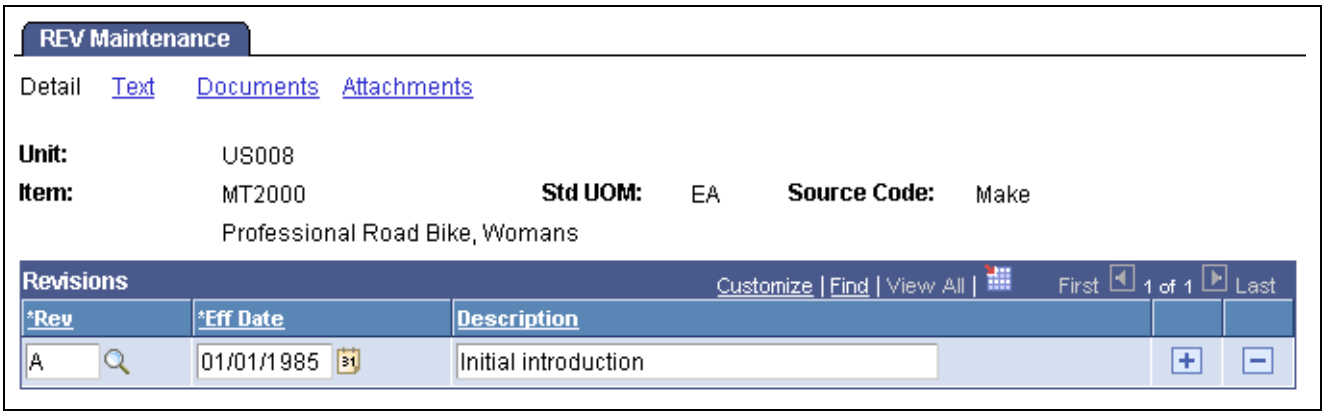

REV Maintenance - Detail page

Rev (revision) and **Eff Date** (effective date)

Enter values for each revision code that you're defining.

Although you can enter as many user-defined revisions as you want, there can be no overlapping dates and no gaps between revision dates for a specific item.

Note. You cannot use the same revision multiple times for an item. Also, you cannot delete a revision if it's tied to an item or one of its BOM components or if it appears 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, the system displays a warning.

In the following example, you can see how existing revisions and BOM effectivity dates are affected when you manually insert a revision (or when the system automatically inserts a new revision). The obsolete date of the preceding revision must be the day before the effective date of the newly inserted revision. Also, if an obsolete date for a revision changes because a new revision is inserted, the obsolete date is also changed on any BOM where it appears.

In this example, a revision-controlled item called LT5000 has 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)

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Component	Effective Revision/Date	Obsolete Revision/Date
A002	AA (01/01/1900)	DD (12/30/2099)
A003	AA (01/01/1900)	-- -- (12/31/2099)

If you add a new revision named CCC on 05/01/1998, then revisions and their underlying effectivity dates change. In addition, component BOMs also reflect this change. This table shows these changes:

Revision	Effective Date	Obsolete Date	Note
AA	01/01/1900	12/31/1996	N/A
BB	01/01/1997	12/31/1997	N/A
CC	01/01/1998	04/30/1998	The obsolete date is changed to the day before the effectivity date of CCC (the new revision).
CCC	05/01/1998	12/31/1998	The new revision is added on 05/01/1998.
DD	01/01/1999	12/31/2099	N/A

The BOM is now as follows:

Component	Effective Revision and Date	Obsolete Revision and Date
A001	AA (01/01/1900)	CC (04/30/1998): The BOM is modified to reflect changes 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.

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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. The system uses 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 build to an older or a future revision by selecting a particular 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 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, you receive a warning regarding components that are not aligned when you change dates of existing revisions. This warning occurs when the change in a revision date causes any existing nonaligned components on BOMs to move to a different revision number based on the date changes that you make. Any affected components are displayed in the REV Maintenance component so that you can address them manually if needed.

Specifying Revision Attachments

Access the REV Maintenance - Attachments page.

File Ext (file extension)	Select the type of media 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 are not using the document management functionality.

Maintaining BOMs

To create and maintain BOMs, use the BOM Maintenance (BOM_MAINTENANCE) component.

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 assemblies or end items if the Used in MFG check box is selected for them 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 that appears when you access the Manufacturing BOMs component.

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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 component. Rework BOMs are always single-level BOMs. Also, PeopleSoft Cost Management does not include rework BOMs in 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 cannot 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, you can have the system send a workflow notification to the selected roles that you've defined—such as engineering manager or cost accountant.

See Also

Chapter 10, "Displaying Bills of Material," page 159

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

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 BOMs as you maintain the assembly's or end item's bill. This prevents you from adding the end item as one of its own components at this level or any lower levels. If you select Never Verify Online, loop-checking runs as a deferred process.

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Pages Used to Maintain BOMs

Page Name	Object Name	Navigation	Usage
Manufacturing BOMs - Summary	EN_BOM_MAINT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Summary	Maintain all components that make up a particular manufacturing BOM for an assembly in a specified 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 BOMs one 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 an assembly.
Header: Assembly Attachments	EN_BOM_ATT	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Assembly Attachments	Associate attachments with 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 document management system that is embedded in the PeopleSoft system. **Note.** You must have PeopleSoft Engineering installed to access this page. See *PeopleSoft Enterprise Engineering 9.0 PeopleBook*, "Managing Documents".
Header: Outputs	EN_BOM_OUTPUTS	Manufacturing Definitions, BOMs and Revisions, Maintain BOMs and Revisions, Manufacturing BOMs, Header, Outputs	Enter output information.

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Page Name	Object Name	Navigation	Usage
Header: Vendor Access List	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. **Note.** You must have PeopleSoft Engineering installed to access this page.
Header: Send Email to Vendors - New Message	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. **Note.** You must have PeopleSoft Engineering installed to 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 components.

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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. **Note.** You must have PeopleSoft Engineering installed to access this page. See *PeopleSoft Enterprise Engineering 9.0 PeopleBook*, "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.
Components: Copy Business Unit Substitute Items	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.

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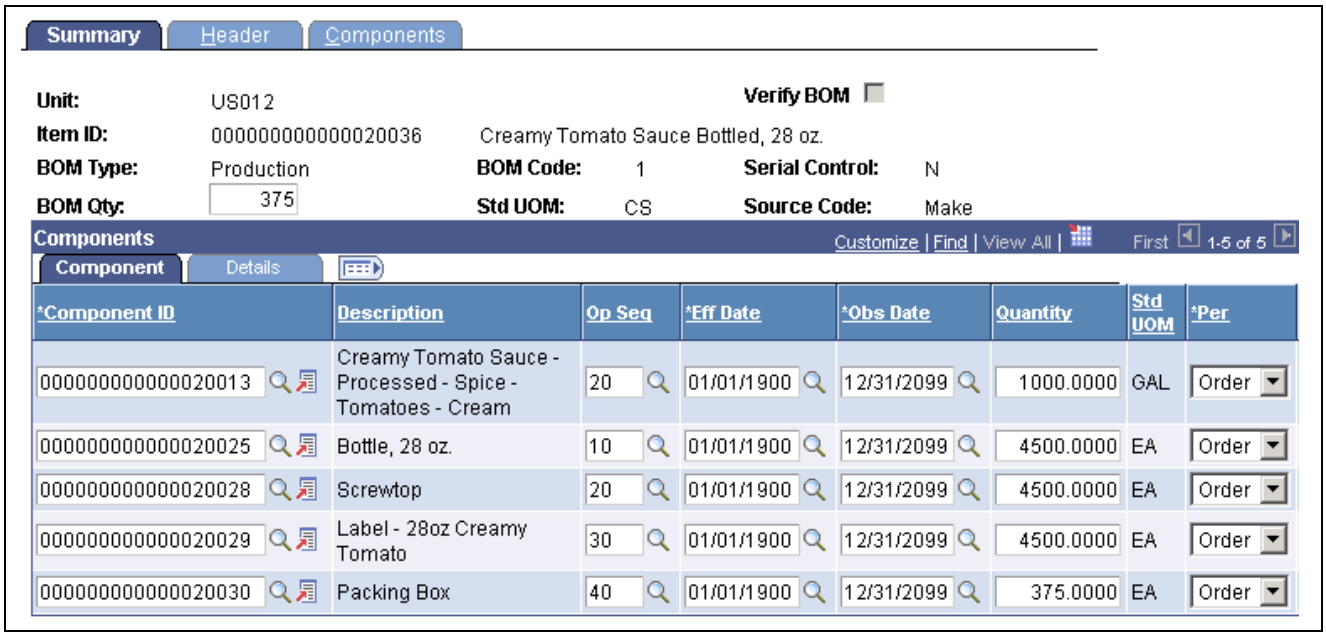
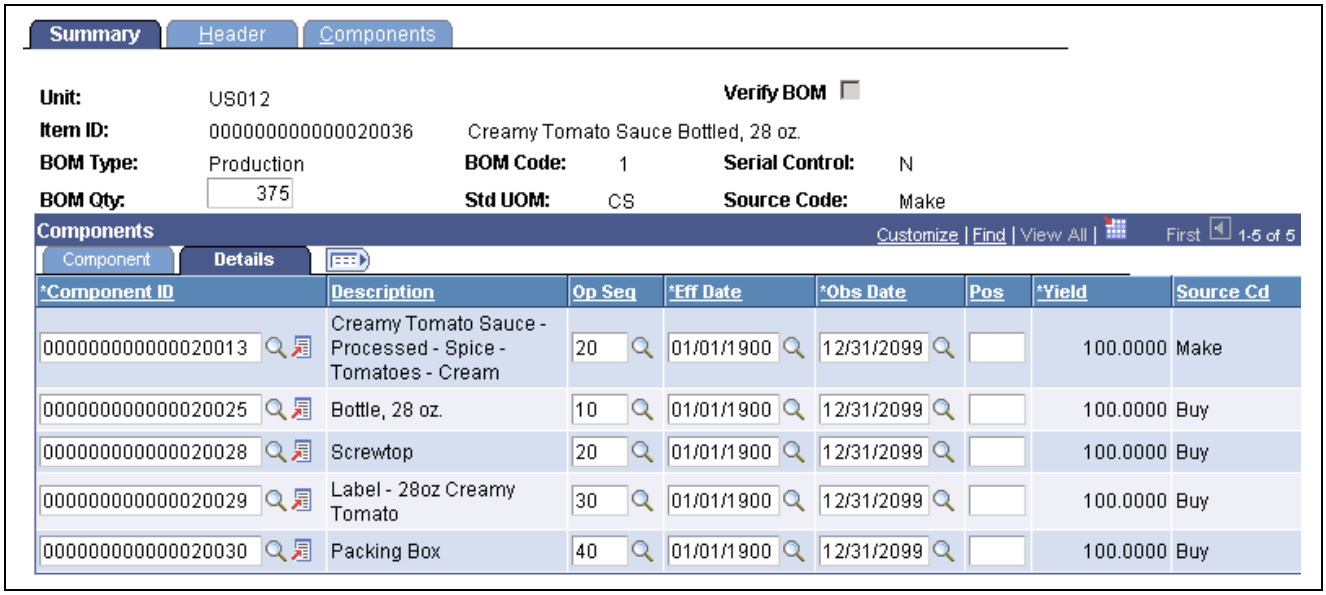


Manufacturing BOMs - Summary page: Components tab



Manufacturing BOMs - Summary page: Details tab

Note. When BOMs are complex and deep, run the BOM Verification process and set BOM verification to Never Verify Online to improve BOM maintenance performance. Use the batch BOM Verification Request page.

Header Information

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:* Create rework BOMs when you have a standard rework process that involves adding components.

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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 are not required to create rework production IDs.

Note. You cannot add the end item to the rework BOM as a component. The system 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, you can use the BOM quantity in a particular way. 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 system applies the components' quantity per assembly or per order. If the BOM quantity is greater than *1,* enter the component quantity for the BOM quantity. If you set the BOM quantity to *1,* the component quantity is the amount of the component required to make one unit.

When BOMs contain multiple outputs, you use the field differently. If a primary item and its 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. The PeopleSoft system supports a calculated QPA precision of four to ten places to the right of the decimal point, 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 cannot be the same as its parent, and you cannot have overlapping effectivity dates for the same component.

Furthermore, you cannot add staged date-controlled items and configured items as components on BOMs.

When you add a component with item status of *Hold* or *Discontinue,* the system displays a warning message. Similarly, when updating components with item status of *Hold* or *Discontinue,* you will receive a warning message

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when saving the page. In both cases, the warning message does not prevent you from performing the action.

Note. You cannot add an item with the status *Inactive.*

Comp Rev (component revision)

Indicates whether 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 on the MFG Business Unit Options page, the system allows you to leave the Comp Rev blank, select a default value, or 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 treats all items as required at the beginning of production. Therefore, the items 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 operation sequence 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 it 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 is not consumed from the WIP location.

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If the operation sequence specified for the component is *0* or does not exist on the routing, the system treats the material as required for the start of production. It issues the material to the work center associated with the production area where the item is being built.

When the operation sequence is set to *0,* it is assumed that the component item is 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) and **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 PeopleSoft Supply Planning 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 in the assembly. The obsolete date or revision must be later than the effective date. The component is effective from the start date (or beginning time) of the effective revision through the end date (or end time) of the obsolete revision.

Quantity

Displays the quantity of the component required for the BOM. You can override this value if necessary.

Std UOM (standard unit of measure)

The system displays the standard UOM for this BOM component.

Per

Values are:

- *Asy* (assembly)
- *Ord* (order)

This field determines the number of each component that 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 field 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. The system displays a warning 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 assemblies called A0001, when you define the BOM, the QPA for B0004 would be 0.5. When the system applies the rounding rules to the QPA, it rounds the QPA for B0004 to *1,* thereby inflating production costs.

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While the Quantity Per field can be maintained with a precision of four places to the right of the decimal, a calculated QPA can be defined with a precision from four to ten 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.

Details tab

Pos (position) (Optional) Enter a position number. This can be a number associated with a component on a BOM drawing or on a list of all components that appear on a BOM.

Yield Displays the expected yield for the BOM component. If you are adding a new component, you can enter the expected yield.

Source Cd (source code) Displays the source code associated with the component.

Engineering Considerations

If you are using PeopleSoft Engineering and outstanding ECOs are pending for the item, the system displays the ECO button next to the assembly item ID if you've checked the ECO Pending Alert check box on the ECO Item Status page. Click the ECO button to view information about the pending ECOs associated with the item.

See Also

Chapter 8, "Maintaining Bills of Material," Defining and Maintaining Revisions, page 97

Chapter 12, "Defining Work Centers," page 193

Chapter 8, "Maintaining Bills of Material," Maintaining BOMs by Revisions or Effectivity Dates, page 91

Chapter 22, "Issuing Material to Production," Understanding Component Issue Methods, page 417

Chapter 14, "Structuring Routings," page 221

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 that 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, Common Definitions.

See Also

PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook, "Defining Procurement Options," Defining File Locations

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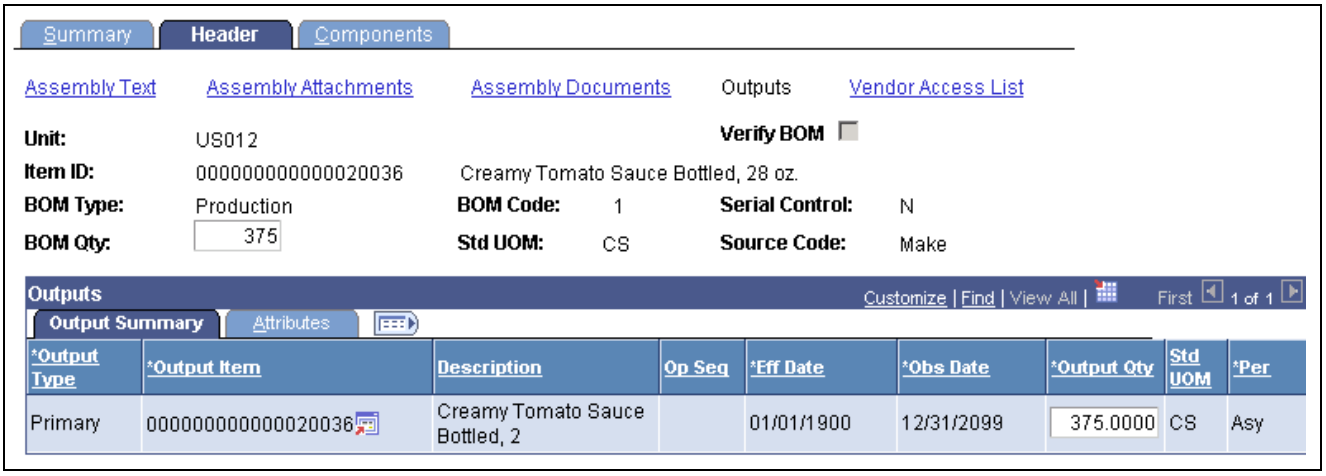
Defining BOM Outputs

Access the Header - Outputs page.



Header - Outputs page: Output Summary tab

Output Summary Tab

BOM Qty (BOM quantity) Displays the default information from the Manufacturing BOMs- Summary page, but you can change the quantity here.

The detail portion of the page contains the end item as the item with the *Primary* output type, and this cannot be deleted. If you are not 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 time to the end 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 item'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 cannot 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*

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- *Waste*

Note. You cannot add more than one primary product.

If you have only one output on this BOM, then it is automatically 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 drink-processing.

If the item is a co-product, the system checks to see whether the item's associated primary item is the item itself. (This is the default.) The system then prompts you to update the co-product's associated primary to this primary assembly item.

A by-product can be a waste product that needs to be disposed of, or it can be a recycle by-product that can be used as an input to other processes (for example, orange pulp). The by-product is incidental to the process and has either a relief (negative) cost for recycle by-products or a disposal (positive) cost for waste by-products.

Waste by-products might 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 costed item.

Output items cannot 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 cannot be a co-product and by-product on the same BOM.
- A primary item cannot be added to or deleted from a BOM.

  The system always automatically adds the assembly or end item for which the BOM is created as the primary output item.
- By-product items must have the source code *Buy.*
- Co-product items must have the source code *Make.*
- Co-product items cannot be phantom or configured items.
- A co-product item cannot be the same as the primary item.
- An item cannott 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 do not 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 configured-item BOMs.

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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 is generated at the last operation on the routing.

The operation sequence functions in a similar fashion for outputs as it does for the components. However, 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 is 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 effective revision and obsolete revision are displayed. On the other hand, if the assembly item is revision-controlled by date, then the effective date and obsolete date are displayed. For the primary item and any co-products, these fields show the beginning time (*01/01/1900* or ---) and the end time (*12/31/2099* or ---), and they are display-only. Only by-products have editable 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 updates the primary item's output quantity to the BOM quantity.

If the BOM already contains additional co-product outputs, and you delete all the additional outputs from the BOM, the system displays a warning that the primary output quantity will be reset to the BOM quantity.

In addition, if the output quantity is used, it should 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 (standard unit of measure)

The system uses the output item's standard UOM.

Note. Because 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 (output quantity per)

This display-only field is available for co-products only. Values are:

- *Asy* (assembly): This indicates that 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.

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The quantity code for the co-products is based on assembly and cannot be changed.

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 the percentage of the components that is 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 item or co-products.

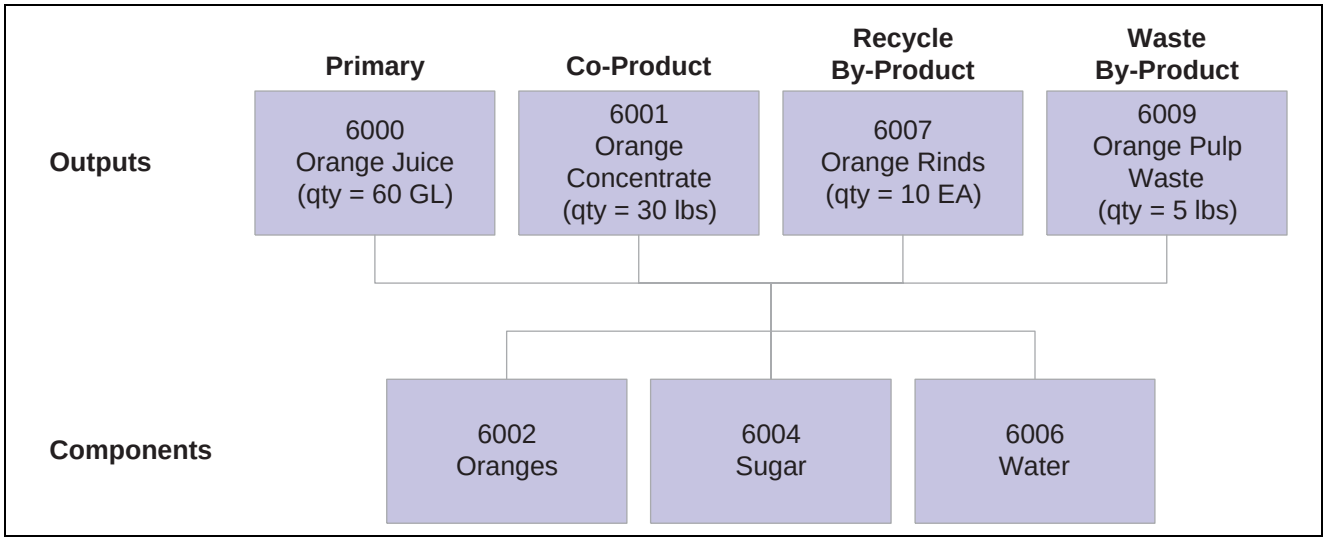
By having two percentages, the resource allocation and cost can be distributed differently for each co-product.

Note. You cannot set the Res% or Cost% field to *0*.

Resource Allocation Percentage Example

In this BOM structure, the quantity of the primary output item 6000) equals 60 gallons and quantity of the co-product (item 6001) equals 30 pounds. The resource allocation percentage for the primary and co-product does not need to be proportional to the output quantity, and it 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.



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) × 40% = 20% of 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 on BOM inquiries to illustrate how much material each output uses when exploding down the levels.

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The resource allocation percentage enables the outputs to be in different UOMs because the percentage specifies the relationship between the co-products, the primary item, and the batch quantity.

Note. For each type of percentage, the total of all primary andco-product percentages must add up to 100 percent. For a single primary item (no co-products), both of these percentages are set to *100*.

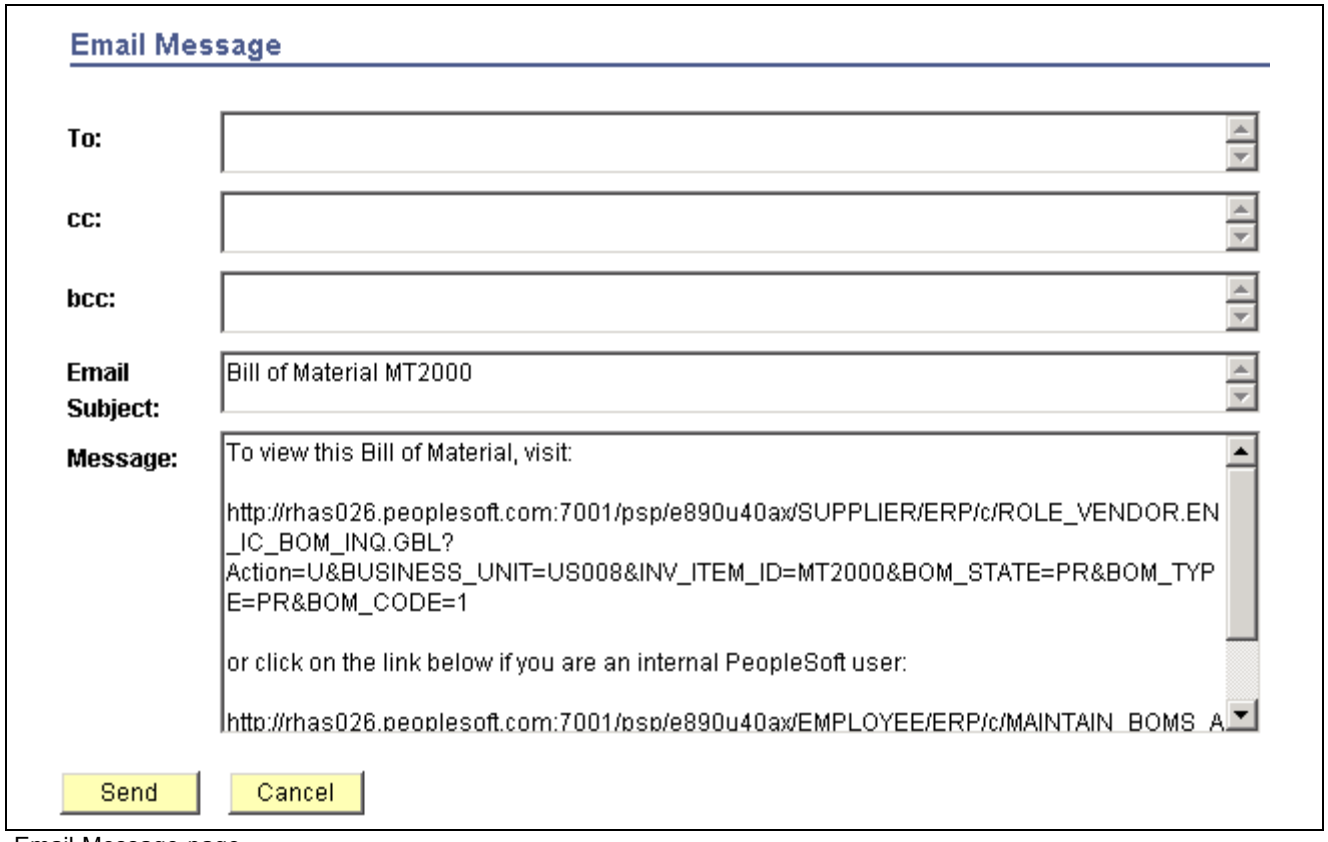
Defining Vendor Access Lists

Access the Header: 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 email. The email message contains 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 Header: Send Email to Vendors - Email Message page.



Email Message page

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If you have PeopleSoft Engineering installed, the default vendor email address appears in the To field. In the case of ECRs and ECOs, the email message is sent to all vendors who have access to the affected item. In the case of MBOMs and EBOMs, the message is sent to the item itself. You can delete email addresses from the address field if you want.

Next, enter standard recipient email information in the cc, bcc, and Email Subject fields.

If you have 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 notifications. It also describes the URL destinations provided to the recipient. If PeopleSoft Engineering is not installed, you cannot send email from a PeopleSoft Engineering page or receive a PeopleSoft Engineering URL destination.

Email Notification's Originating Page	URL Destination Page
Bill of Material inquiry page 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 page in PeopleSoft Engineering	Change Request Detail page in PeopleSoft Engineering ECR Maintenance - Header page in PeopleSoft Engineering
Change Order Detail page in PeopleSoft Engineering	Change Order Detail page in PeopleSoft Engineering ECO Maintenance - Header page in PeopleSoft Engineering
ECO Maintenance - Header page in PeopleSoft Engineering	ECO Maintenance - Header page in PeopleSoft Engineering Change Order Detail page in PeopleSoft Engineering
ECR Maintenance - Header page in PeopleSoft Engineering	ECR Maintenance - Header page in PeopleSoft Engineering Change Request Detail in PeopleSoft Engineering
Approve ECO page in PeopleSoft Engineering	Change Order Detail in page PeopleSoft Engineering ECO Maintenance - Header page in PeopleSoft Engineering

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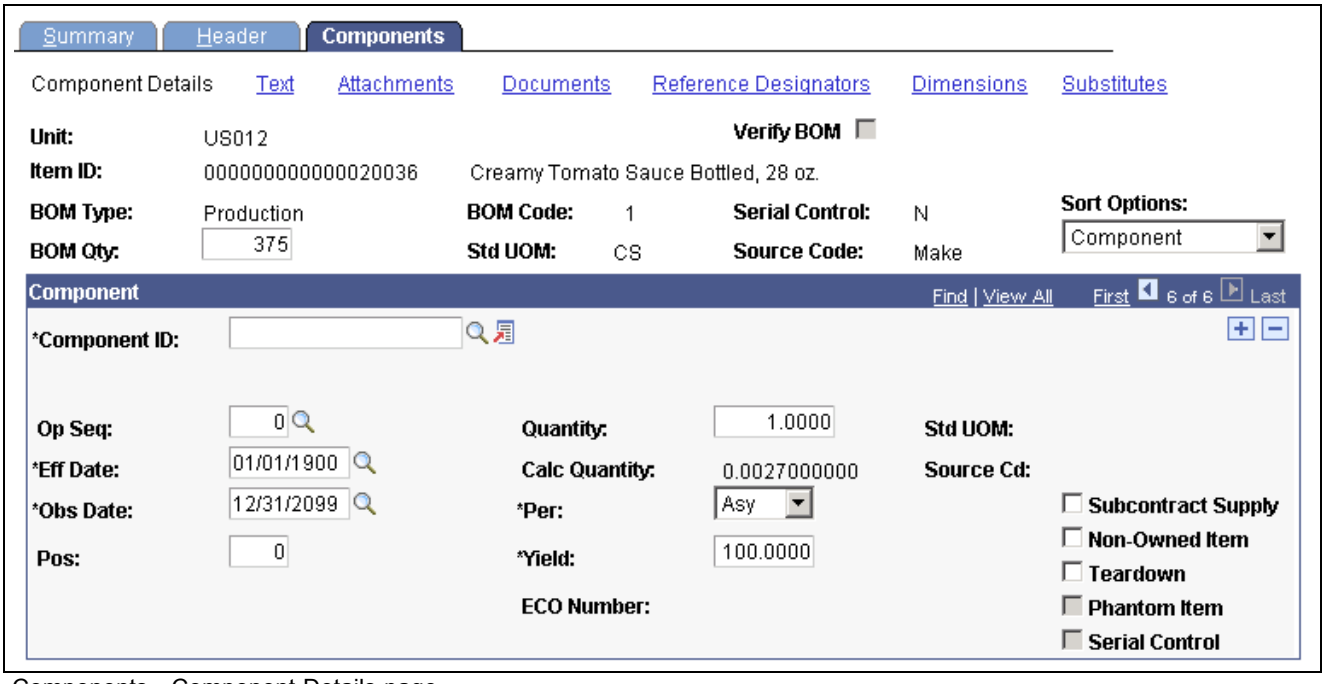
Email Notification's Originating Page	URL Destination Page
Manufacturing BOMs- Header: Vendor Access List page in PeopleSoft Manufacturing	Engineering Manufacturing BOMs- Summary page in PeopleSoft Engineering Bill of Material inquiry in PeopleSoft Engineering
Engineering Manufacturing BOMs- Header: Vendor Access List page in PeopleSoft Engineering	Manufacturing BOMs- Summary page in PeopleSoft Manufacturing Bill of Material inquiry page in PeopleSoft Engineering

Note. The sender of any email notification can always edit the distribution list and the URLs in the message. Also, even though recipients may receive URLs, they must have the necessary privileges to access the system.

Maintaining BOM Component Details

Access the Components: Component Details page.



Components - Component Details page

Note. When you add a component with the item status *Hold* or *Discontinue,* the system displays a warning message. Similarly, when you update components with the item status *Hold* or *Discontinue,* the system displays a warning when you save the page. In both cases, the warning message does not prevent you from performing the action.

Sort Options Select how you want to view components. Values are:

- *Component*
- *Effectivity*
- *Op Sequence* (operation sequence)

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- *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 cannot enter a revision for the item. The column is not accessible, and the current revision is always used. This ensures consistency with PeopleSoft Cost Management and PeopleSoft Supply Planning, which use the current assembly revision when exploding assemblies.

Pos (position)

(Optional) Indicates a position number. This can be a number associated with a component on a BOM drawing or on a list of all components that appear on a BOM.

Per

Select either *Asy* (assembly) or *Ord* (order).

For the quantity, if you set the Per field 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 the *Per* field to *Ord,* the system uses the quantity per order regardless of the demand quantity or order size. A quantity per order (QPO) is a fixed amount, regardless of the order size. If the QPO is 100, then the quantity issued to production is 100 regardless of whether an order is for 1 item or 500 items.

Note. The quantity per assembly may be different for original items and their substitutes.

QPA (quantity per assembly)

PeopleSoft Manufacturing supports a calculated QPA precision rounded from four to ten decimal 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 four places, the system recognizes 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 means that the entire quantity of the component is usable and none will be scrapped. A yield of 90 percent yield means that 10 percent of the component issued will be unusable or scrapped.

The system uses the component yield setting in PeopleSoft Supply Planning and PeopleSoft Cost Management processes. In 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.

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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 (111 × .10) are 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 process (ENPMMAIN).

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 nonsubcontracting scenarios, including those in which:

- You handle manufacturing in house, and you supply all components.
- A subcontractor supplies some of the components, and outside processing is performed.
- The 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 do not provide all the components necessary to manufacture the item.

Subcontract Supply Select if an outside vendor supplies part of the manufacturing process and the component is supplied by the outside vendor.

Non-Owned Item Select if you do not own the component, and you want to indicate that the 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 are not included in the assembly cost.

This table describes the Subcontractor Supply and Non-Owned Item field combinations:

Field Selection	Description
Subcontract Supply and Non-Owned Item are both selected.	A subcontractor supplies the component.

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Field Selection	Description
Subcontract Supply is cleared, and Non-Owned Item is selected.	You are the subcontractor, and the customer supplies the component.
Subcontract Supply and Non-Owned Item are cleared.	You supply the component.
Subcontract Supply is selected and Non-Owned Item is cleared.	This is not a valid combination.

Teardown Select to indicate whether the component is an output from a teardown order.

When you select the check box, the system designates the component as a teardown output. If you do not select the check box, this indicates the component will not 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 in 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). That way, if you tear down based on an original production ID, the system can determine which components are used as 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 in the business unit. For all items where this default is in place, the system selects the Teardown check box when you add a component to a BOM.

Teardown components cannot be subcontractor-supplied because those components are not 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 105

Chapter 3, "Defining Your Business Unit Structure," Setting Up Manufacturing Business Unit Options, page 32

Adding Reference Designators

Access the Components: Reference Designators page.

Reference Designators You can associate an unlimited number of reference designators with a component of an assembly item. The designator is any alphanumeric code

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that you can use to determine where a component is placed in an assembly. The electronics 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 be placed in a board, you can give each its own reference designation to aid in positioning.

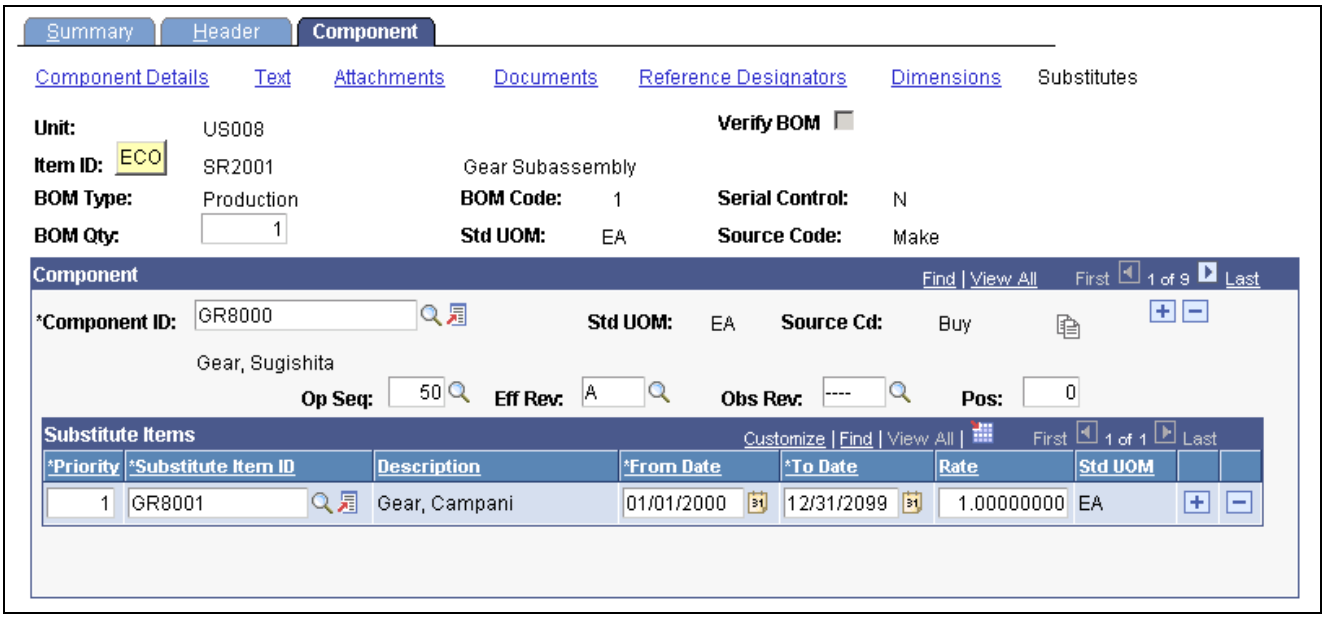
Adding Component Dimensions

Access the Components: Dimensions page.

Production Specifications These default values come from the item definition in PeopleSoft Inventory, but you can change them for the component.

Adding Substitute Components

Access the Components: Substitutes page.



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, Rate, From Date, and **To Date** Enter values for the new component. Enter the conversion rate in the Rate field.

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Std UOM (standard unit of measure) Enter the UOM, which 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, if 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, the PeopleSoft system 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 Supply Planning are not transferred back to the transaction system.

Copying and Deleting BOMs

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 the Manufacturing BOMs component, you can then change the new structure as needed.

This section discusses how to:

- Copy BOMs.
- Copy BOM detail.
- Copy BOM outputs.
- Delete BOMs.

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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 details of the BOM that 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.

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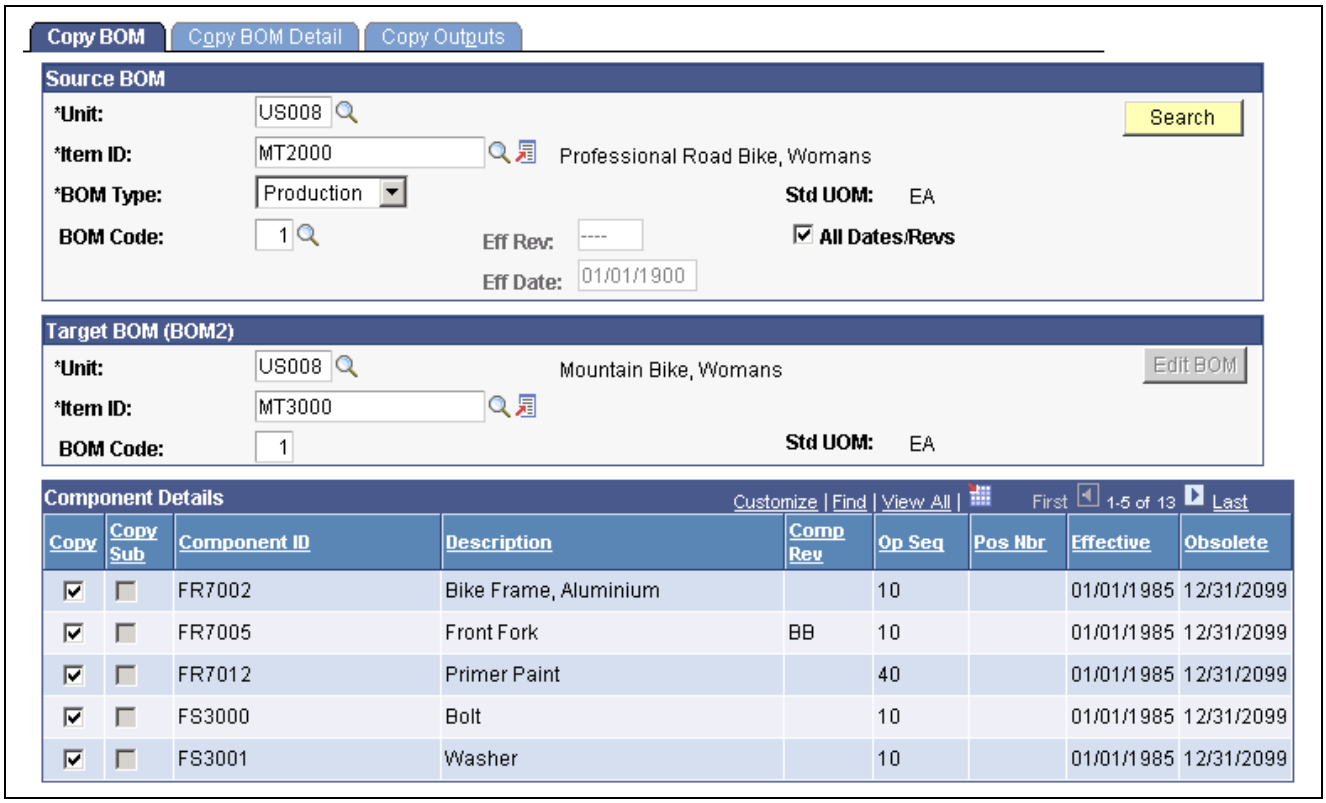

Copy BOM page

Source BOM

Unit, Item ID, BOM Code,, and **Eff Date** (effective date) or **Eff Rev** (effective revision)

Enter values for the BOM that you want to copy.

BOM Type

Note. The BOM type of the target BOM and the source BOM must be the same. Consequently, it is not entered in the Target BOM group box.

All Dates/Revs

Select 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 can also copy assembly and component text, documents, and attachments. Use the Copy Engineering BOM Detail page to copy attachments.

If you are copying a source assembly or end item that's revision-controlled to a target that is not a 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.

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The target BOM is also updated with any component revisions specified on the source BOM.

Edit BOM

After you click Save, the system activates this button.

Click the Edit BOM button to access the BOM Summary page, where you can edit the attributes of the target BOM.

Note. You cannot 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 components do not 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 component 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 that 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 cannot copy a BOM to itself.

Component Details

Copy

Select to specify components to copy to the target BOM.

If you clear this check box, you can exclude a particular component row from being copied.

If the component is revision-controlled, you can also exclude a specific component and revision combination from being copied.

Copy Sub (copy substitutes)

Select to copy specified substitutes.

Copying BOM Detail

Access the Copy BOM Detail page.

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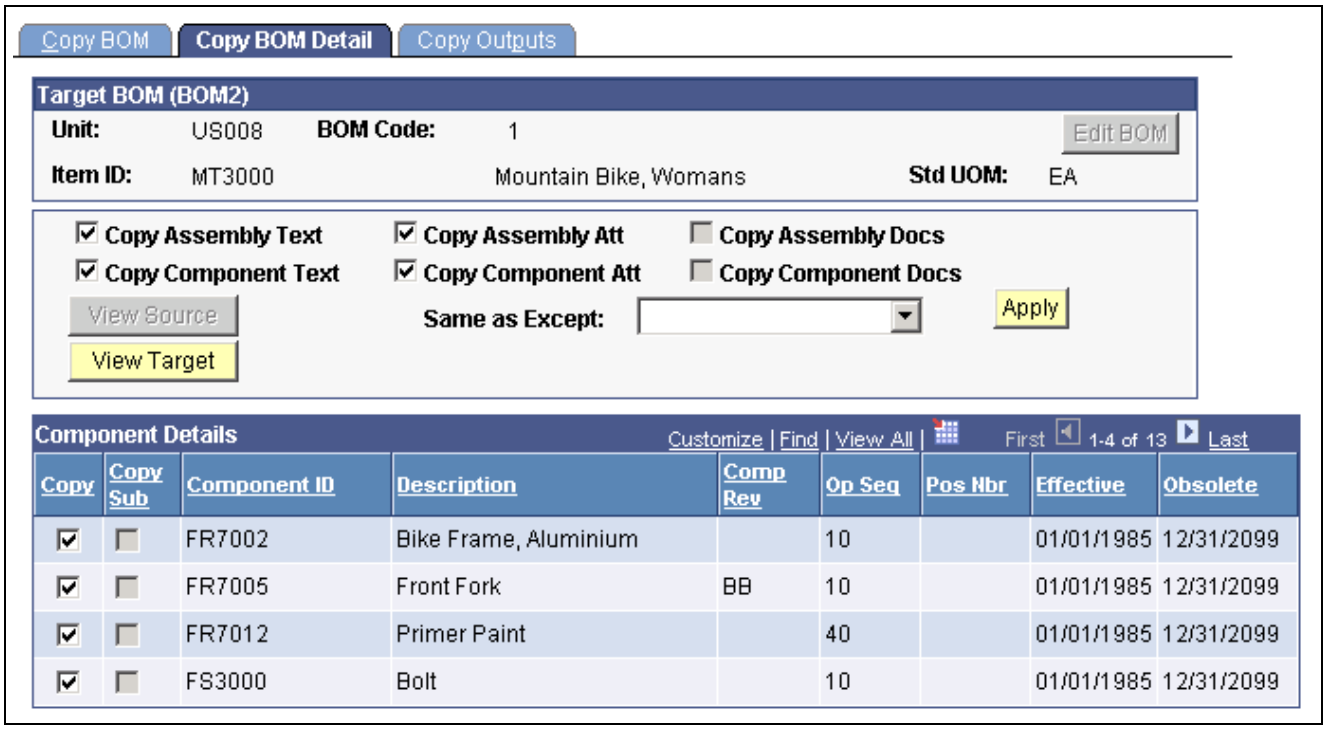

Copy BOM Detail page

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

Click to view the original that you are copying and the copying choices that you've made.

View Target

Click to preview how the BOM will appear after the copy.

Same as Except

Select to indicate how the BOM is copied. Values include:

- *Exclude All:* The 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 does not 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 does not copy.
- *Include All:* The system marks all components on the source BOM to be copied.
- *Include Date Range*
- *Include Item Range:* This feature is the same as the exclude feature except that you enter the range of items that you want to copy.
- *Include Pos Range* (include position range): This feature is the same as the exclude feature except that you enter the range of position numbers that you want to copy.

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- *Include Revision Range:* You 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 field values with 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 then clear a component's Copy check box or click Exclude All to clear all the check boxes.

Apply Click once after you've selected the Same as Except value.

Copy Select a component's check box to specify components or component revisions.

Copy Sub (copy substitutes) Select to copy specified substitutes to the target BOM.

Engineering Considerations - Transferring BOMs

If you have PeopleSoft Engineering installed, you can also transfer multiple BOMs immediately from PeopleSoft Engineering to PeopleSoft Manufacturing or from PeopleSoft Manufacturing to PeopleSoft Engineering.

See Also

PeopleSoft Enterprise Engineering 9.0 PeopleBook, "Processing ECRs and ECOs," Transferring BOMs and Routings

Copying BOM Outputs

Access the Copy BOM Detail page.

Copy Select 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 quantity, resource allocation percentage, and 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 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.

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Search Click to display the list of production or rework BOMs for the assembly items that you are deleting.

Click the Select All button to select each Delete? check box. Use this option to include or exclude assemblies that 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 have header, outputs, related text, attachments, components, and reference designators deleted.

Only the BOM codes with the Delete? check box selected are deleted. The system displays an error message if you try to delete a BOM code that's part of a production option.

The Delete BOMs process checks the system and warns you if the BOM is used in a production area or if production has the *Entered* status (production is planned, but a BOM and routing have not yet been frozen for production).

Note. Because the system copies BOMs to production, deleting a BOM has no impact on production with the status *Firmed* or *Released.*

Verifying BOMs

If BOMs are poorly designed, they can contain unwanted loops. A looping BOM occurs when an assembly has itself as a component of one of its subassemblies. To locate these loops in product structures, run BOM verification regularly. You can also use online BOM verification to check for looping BOMs. You set this option at the manufacturing business unit level by using the MFG Business Unit Options page. However, to improve BOM maintenance performance when BOMs are complex and deep, use the 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 (ENPBEXPV) for Looping BOMs

Access the BOM Verification page.

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All Dates/Revs (all dates and revisions)	Select to verify all dates and revisions of the BOM.
BOM Code	Enter the priority code of the BOM that you want to verify.
Depth	Enter a value to specify how many levels to verify.
Delete Rows, If No Errors	Select 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. The BOM Verification process (ENPBEXPV) checks only the primary BOM and routing when exploding at levels greater than 1. If there is more than one way to make a particular co-product output, you need to specify which BOM is the primary way to make the co-product. This indicates to the system which BOM to verify for the co-product. By selecting an associated primary BOM on the Define Business Unit Item - Manufacturing: General page, you designate which BOM to verify. The BOM Verification process takes both co-products and multiple BOM codes into account when checking if loops exist.
Run	Click to run the request. Process Scheduler runs the BOM Verification process at user-defined intervals. You receive a message only if the system finds a looping BOM. View the results of the BOM Verification process by using the BOM Verification Status page.

See Also

Chapter 8, "Maintaining Bills of Material," Assigning Associated Primary BOMs, page 96

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

Deleting BOM Verification Rows

Access the Delete BOM Verification Rows page.

The BOM Verification process adds a series of records to the BOM Explosion table. These records take up space and are not used 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 to indicate which records 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.

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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 BOM Access by Vendor component. 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 the vendor 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 BOM inquiry and the ECR, you must use the BOM Access by Vendor page to enable the vendor to access information.

For ECOs, this page is optional. If a vendor is an approver on a change order, then that change order is automatically made available to that vendor. Vendors can also view any ECO or ECR if the vendor has 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	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 with vendors. This enables you to grant vendors 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 to grant the vendor the privilege of viewing and creating ECRs. This privilege is associated with the vendor, rather than with a specific item.

By default, the check box is cleared. The vendor does not see Add, Upload, Save, and Delete buttons when viewing ECRs.

Note. Vendors can change only the ECRs that they have created.

Add ECR Attachment and **Add ECO Attachment**

Select to define whether the vendor can upload documents into ECRs and ECOs.

Selecting these check boxes also enables vendors to delete ECR and ECO attachments. Although they can delete ECR attachments that they own during

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any session, they can delete ECO attachments only during the session in which they added them (and only before saving the page).

Item ID Select all items that you want to be visible to the specified vendor.

This table outlines what the vendor can access, based on the settings you define with this page:

Check Box	Vendor Capability	Default
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
View ECR	View the ECRs associated with the 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 ECOs associated with the 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

For 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 cannot 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. The ECR and ECO maintenance headers contain a Not Accessible by Vendors check box. If selected, that option blocks access to the specified ECRs and ECOs. Therefore, even if you have granted vendors access by using the BOM Access by Vendor page, you can deny them access to specific ECOs or ECRs.

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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 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 Enterprise Engineering 9.0 PeopleBook, "Making Mass Engineering Bill of Material Changes"

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Defining BOM Mass Maintenance Codes

To define manufacturing BOM mass maintenance codes, use the BOM Mass Maintenance (MBOM_MASS_MAINT) 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 Enterprise Application Fundamentals 9.0 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 26

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.

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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 Enterprise Application Fundamentals 9.0 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_SP	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.
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.

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Page Name	Object Name	Navigation	Usage
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 *Component* 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 *Component* sequence type.
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.

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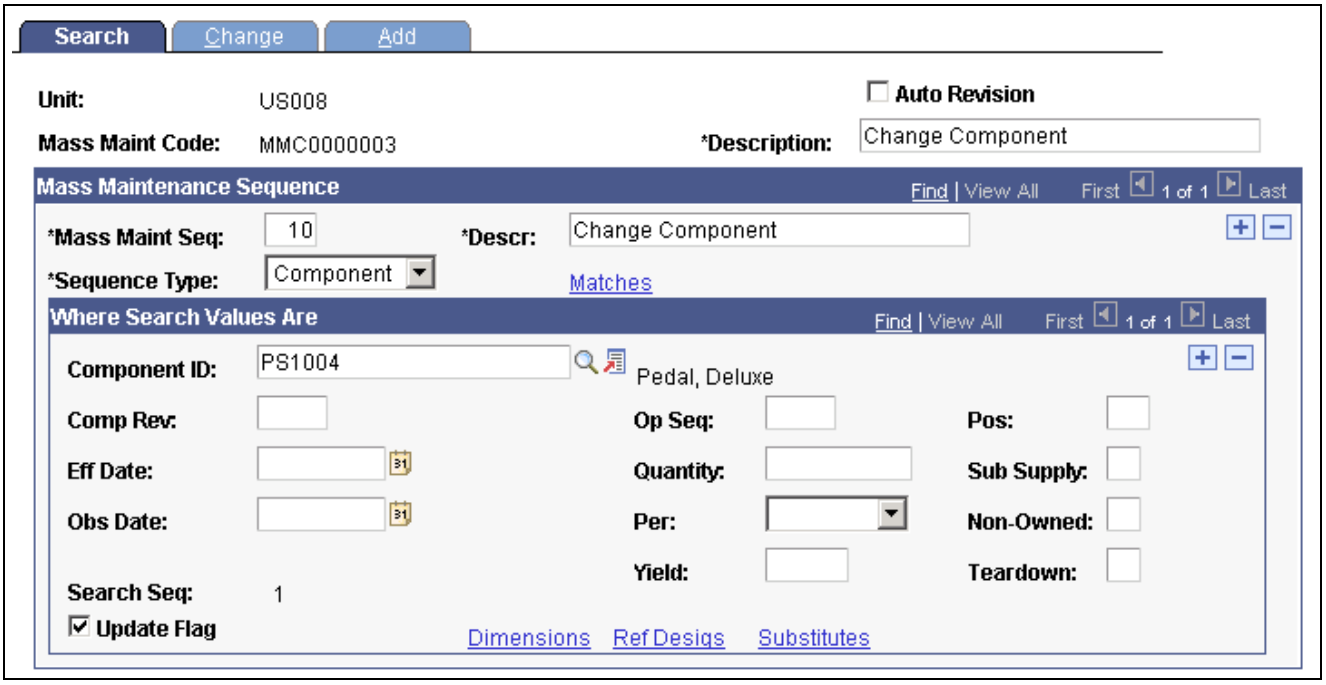
Identifying Specific BOMs for Change

Access the Search page.



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 the 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.

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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 the 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.

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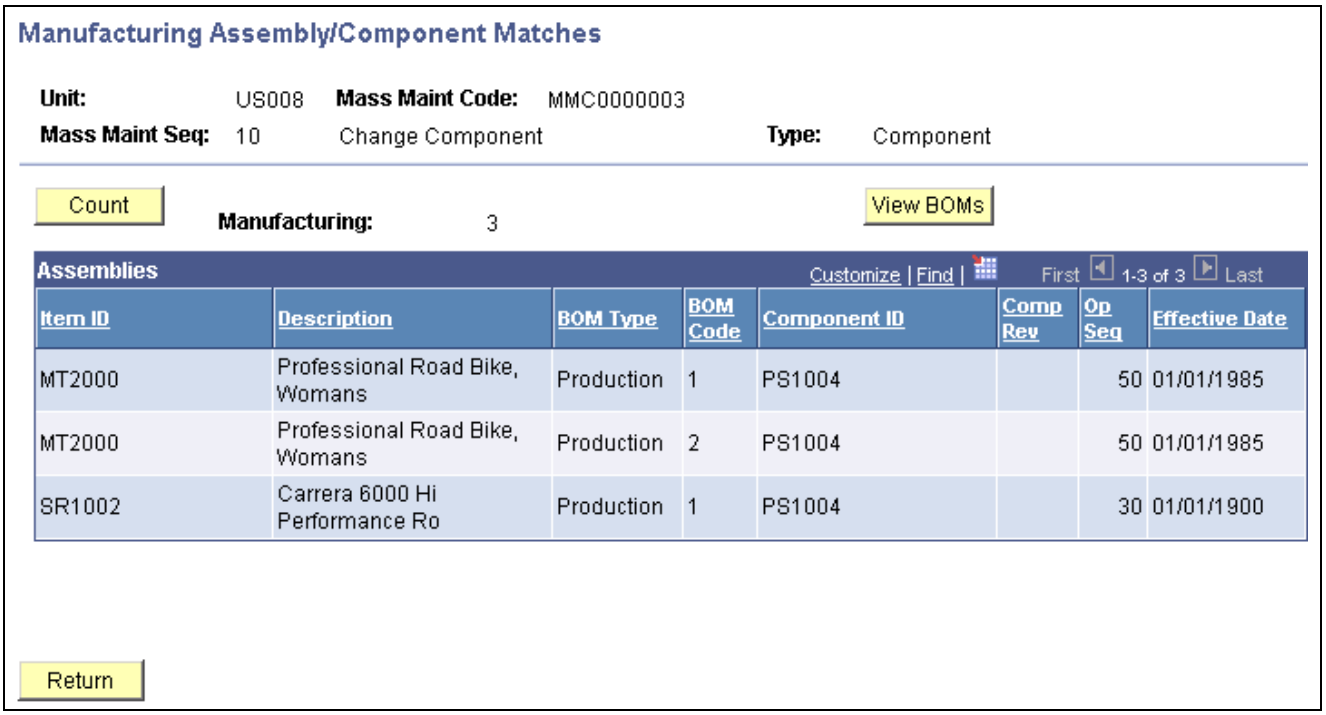

Manufacturing Assembly/Component Matches page

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.

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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.

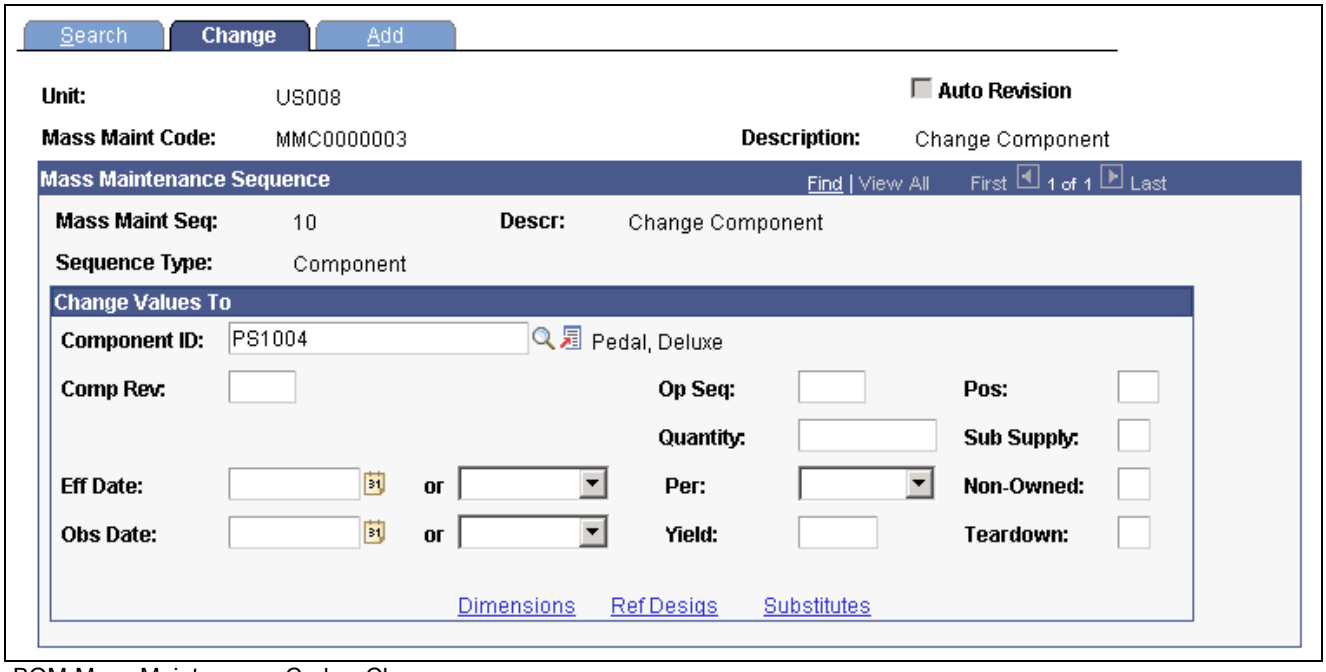
To search for a specific component substitute with a particular priority, then enter both the sub-item and the priority.

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.



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.

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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 *Prior Date* or *Schd Date* for the obsolete date.

If you select *Schd Date* 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:

- *Prior Date:* 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.

- *Schd Date* (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.

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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.

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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.

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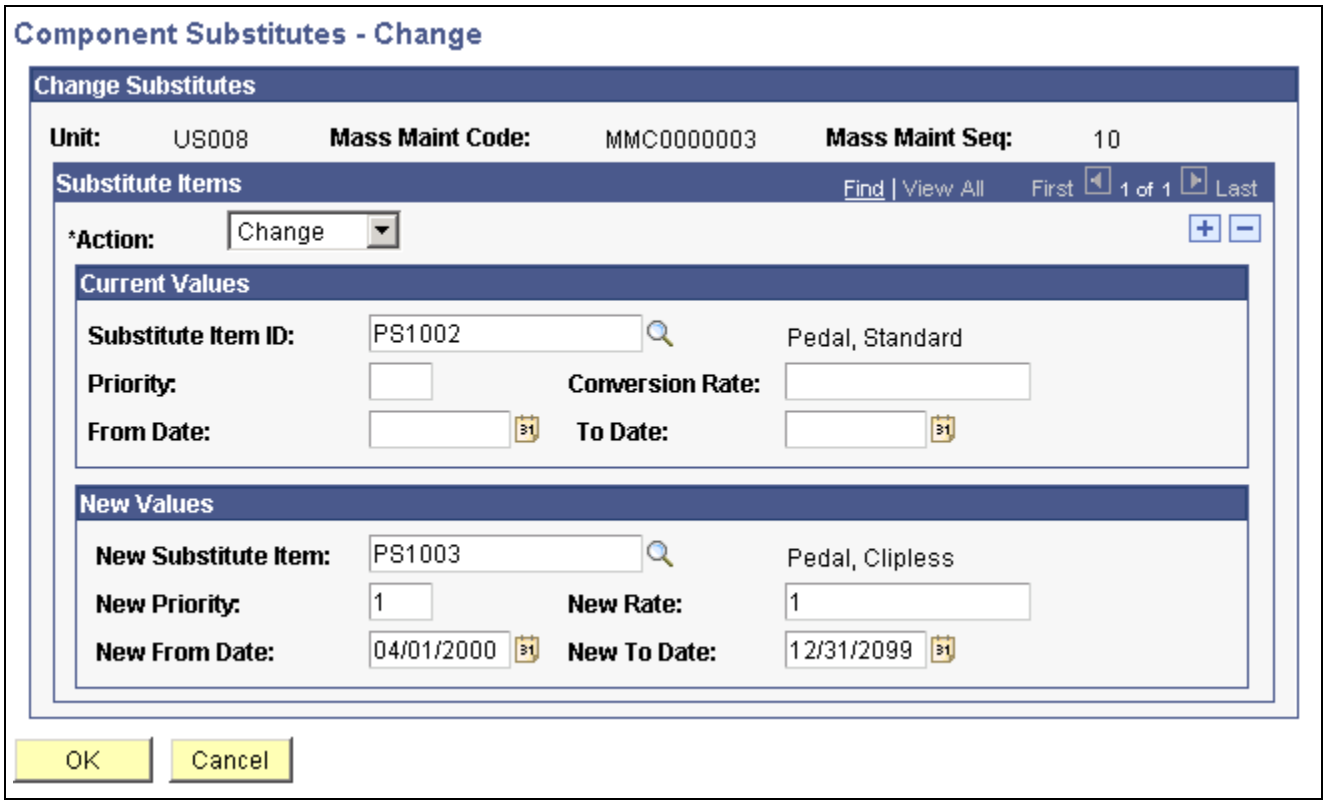

Component Substitutes - Change page

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.

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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.

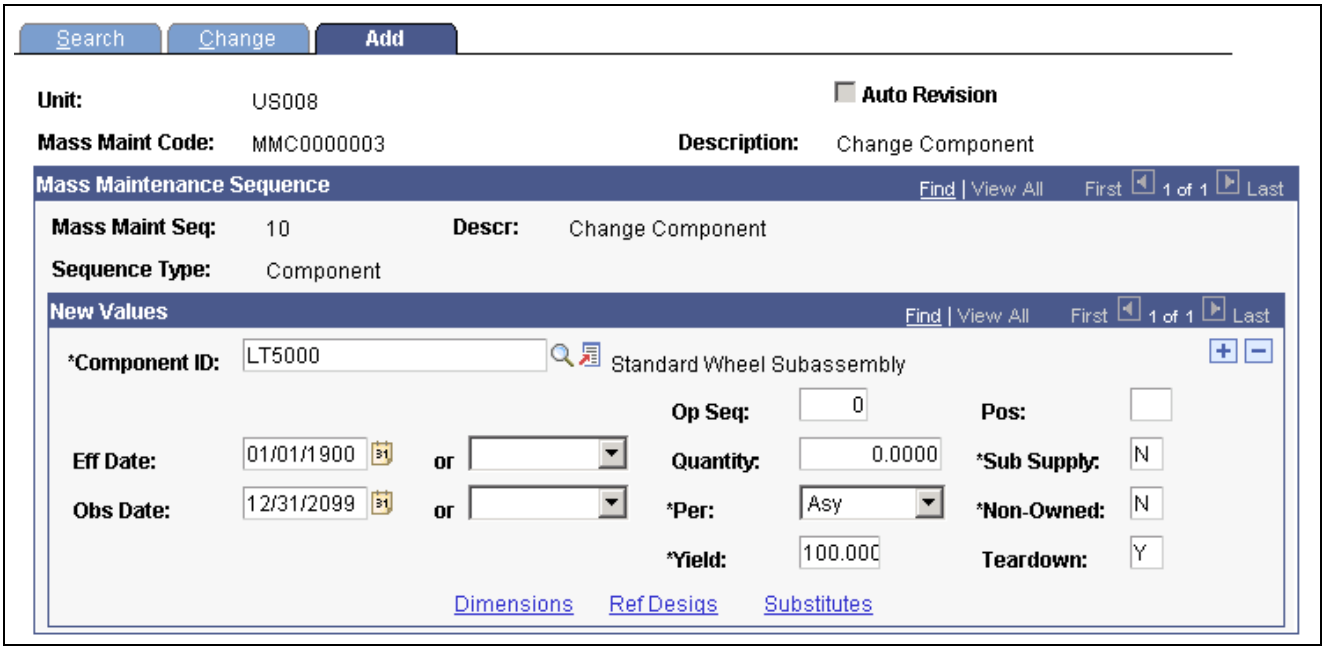
If you're adding a new substitute, you must specify all of the required new values.

New Priority, New From Date, New To Date, New (conversion), and **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.



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.

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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.

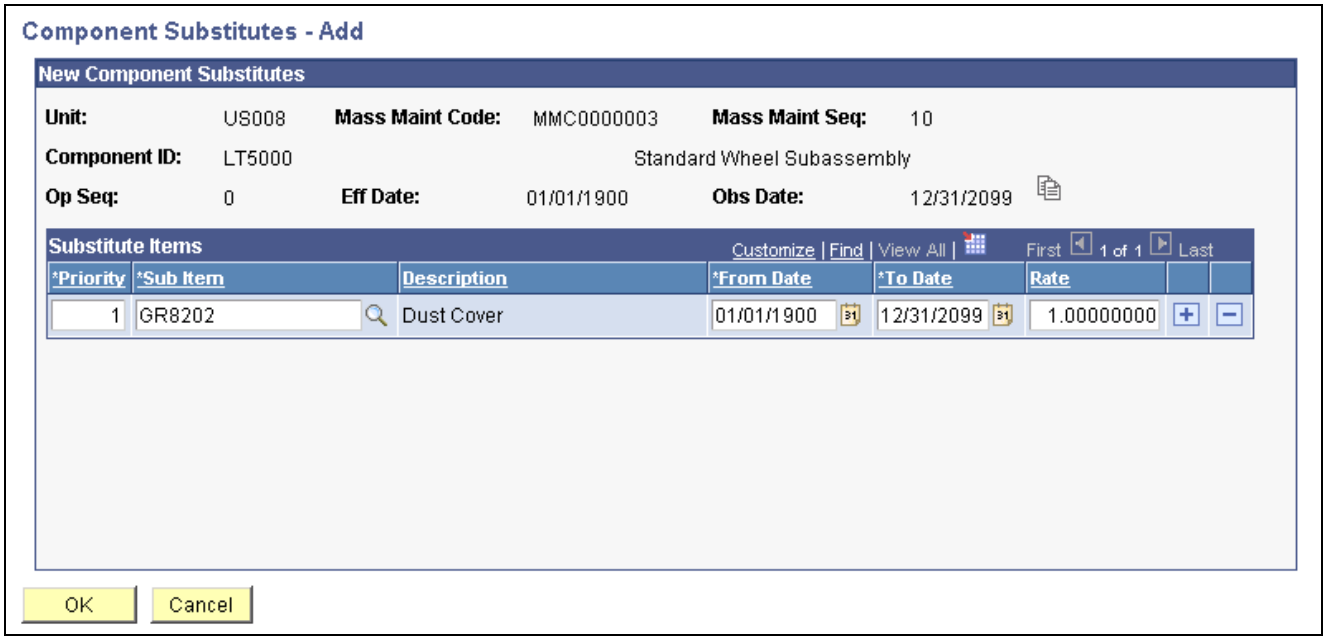
Note. The values that you select on these pages are subject to the same validation checks that apply to any MBOM component or output value. Some of these checks occur when you create the mass maintenance code, and the remaining validation checks occur when the MMC is applied.

See Also

Chapter 9, "Making Mass BOM Changes," Changing Components, page 140

Entering Component Substitute Add Criteria

Access the Component Substitutes - Add page.



Component Substitutes - Add page

Click the Copy Substitute Pushbutton 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.

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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.

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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.

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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 cannot 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 140

Using Assembly Item Options

Access the Assembly Item Options process page.

Item Options

Select an item option. Values are:

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- Range: Also select the BOM type and BOM code.
- List of Assembly Items

Click the Search button to search for items to add to the list of assembly items.

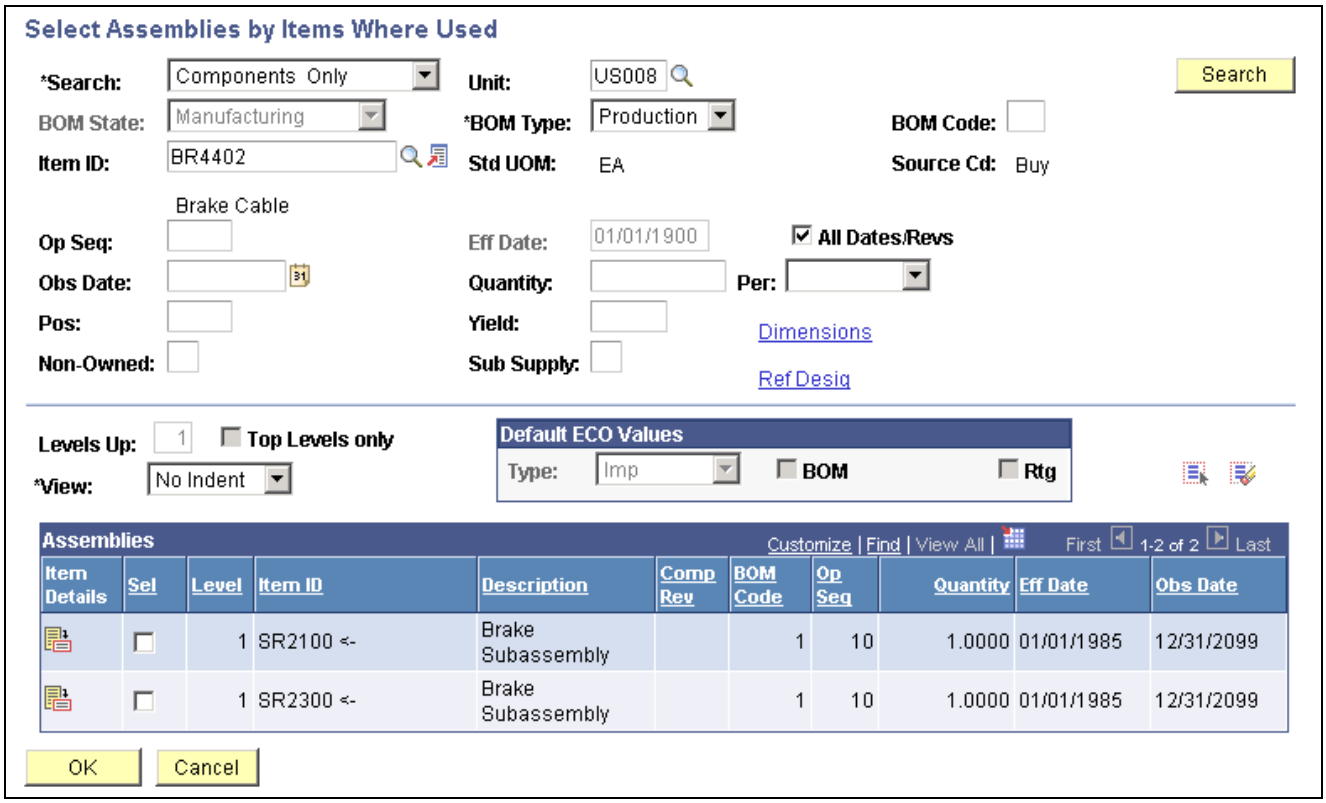
Run Click to run this request. PeopleSoft Process Scheduler runs the BOM Mass Maintenance COBOL SQL process at user-defined intervals.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

Selecting Assemblies by Items Where Used

Access the Select Assemblies by Items Where Used page.



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.

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	• *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.

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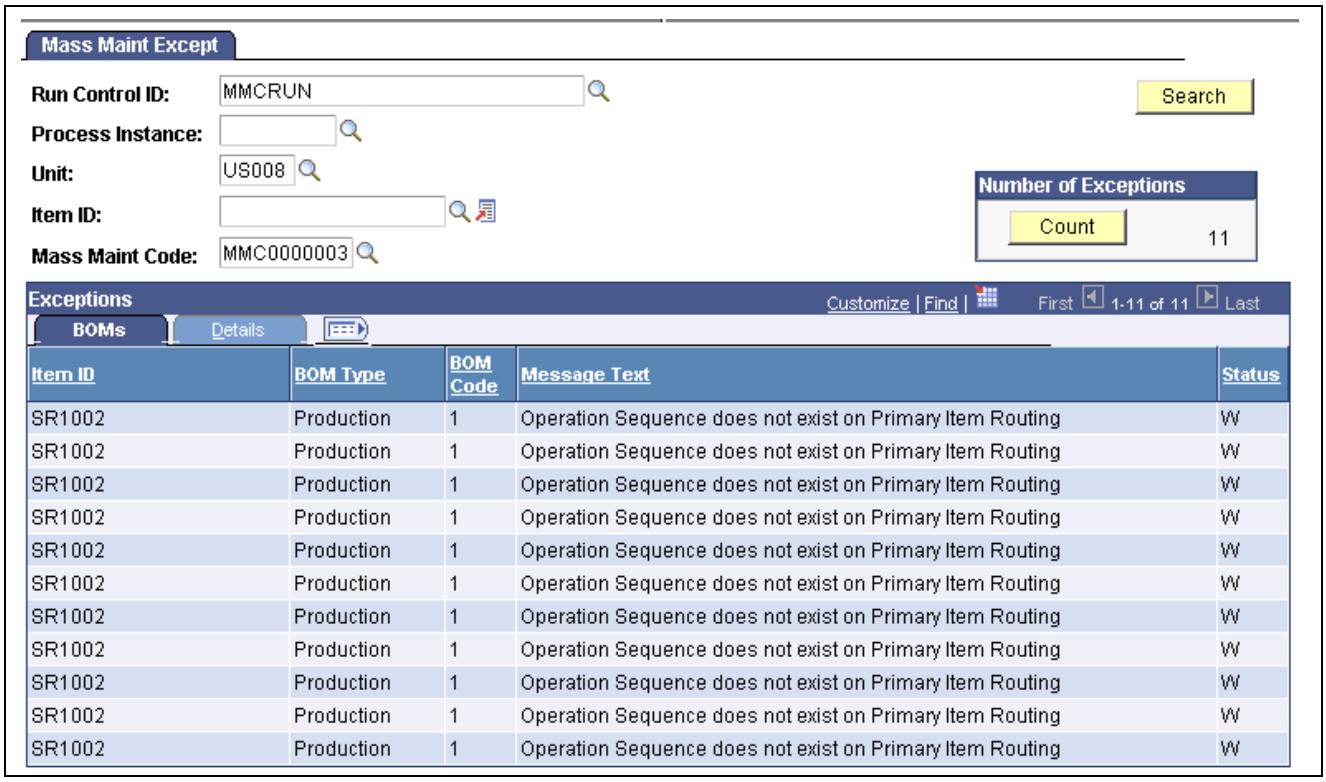

Item ID	BOM Type	BOM Code	Message Text	Status
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	1	Operation Sequence does not exist on Primary Item Routing	W
SR1002	Production	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

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.

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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 *Stage Result* 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.

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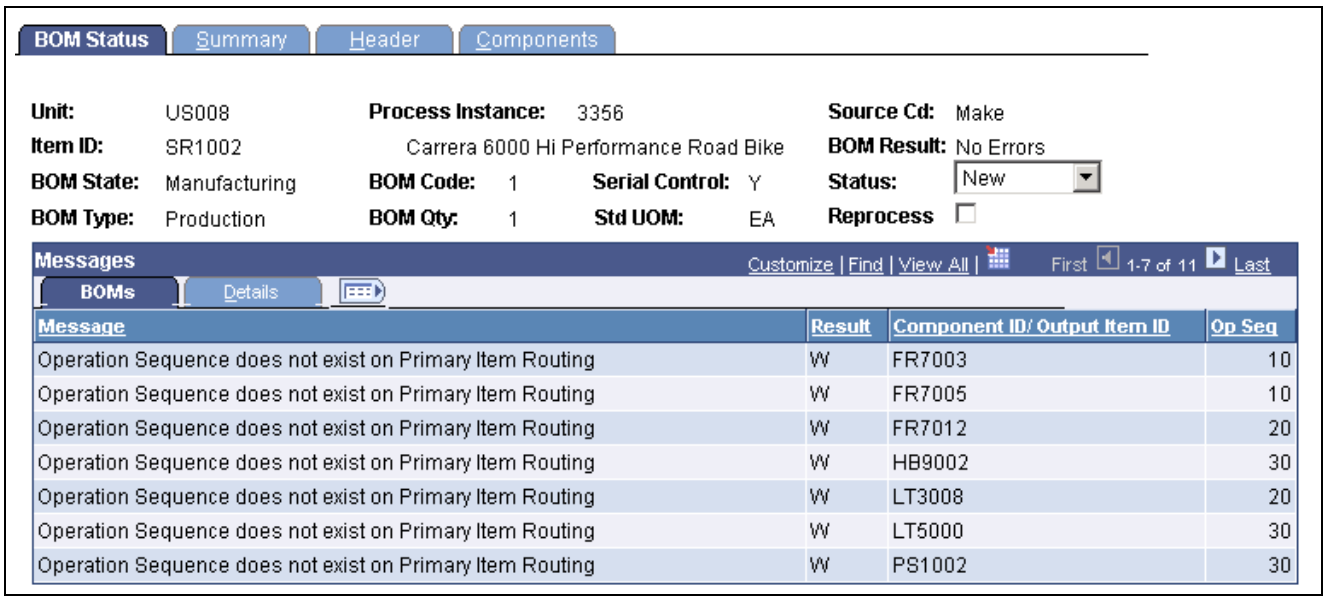
Viewing the Staged BOM Status

Access the Update Staged BOM Details - BOM Status page.



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 cannot 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*.

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- *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 156

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** You can change values for these fields.

See Also

Chapter 8, "Maintaining Bills of Material," Maintaining BOM Summaries, page 105

Correcting Staged BOM Multiple Output Summary Errors

Access the Update Staged BOM Details - Header: Outputs page.

Output Summary Tab

For each output, you can change the output type, output item, operation sequence, effective dates, and output quantity.

Attributes Tab

You can change the resource allocation percentage and cost allocation percentage.

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See Also

Chapter 8, "Maintaining Bills of Material," Defining BOM Outputs, page 111

Processing Staged BOMs

After you've viewed and corrected the 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.

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See Also

Enterprise PeopleTools 8.48 PeopleBook: Process Scheduler

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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 *Manufacturing* and is display-only.

BOM Type Select a BOM type. Values are:

- *Production:* This is the default BOM type.

  Manufacturing BOMs can be used for standard manufacturing processes.
- *Rework:* 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.

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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.

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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.

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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.

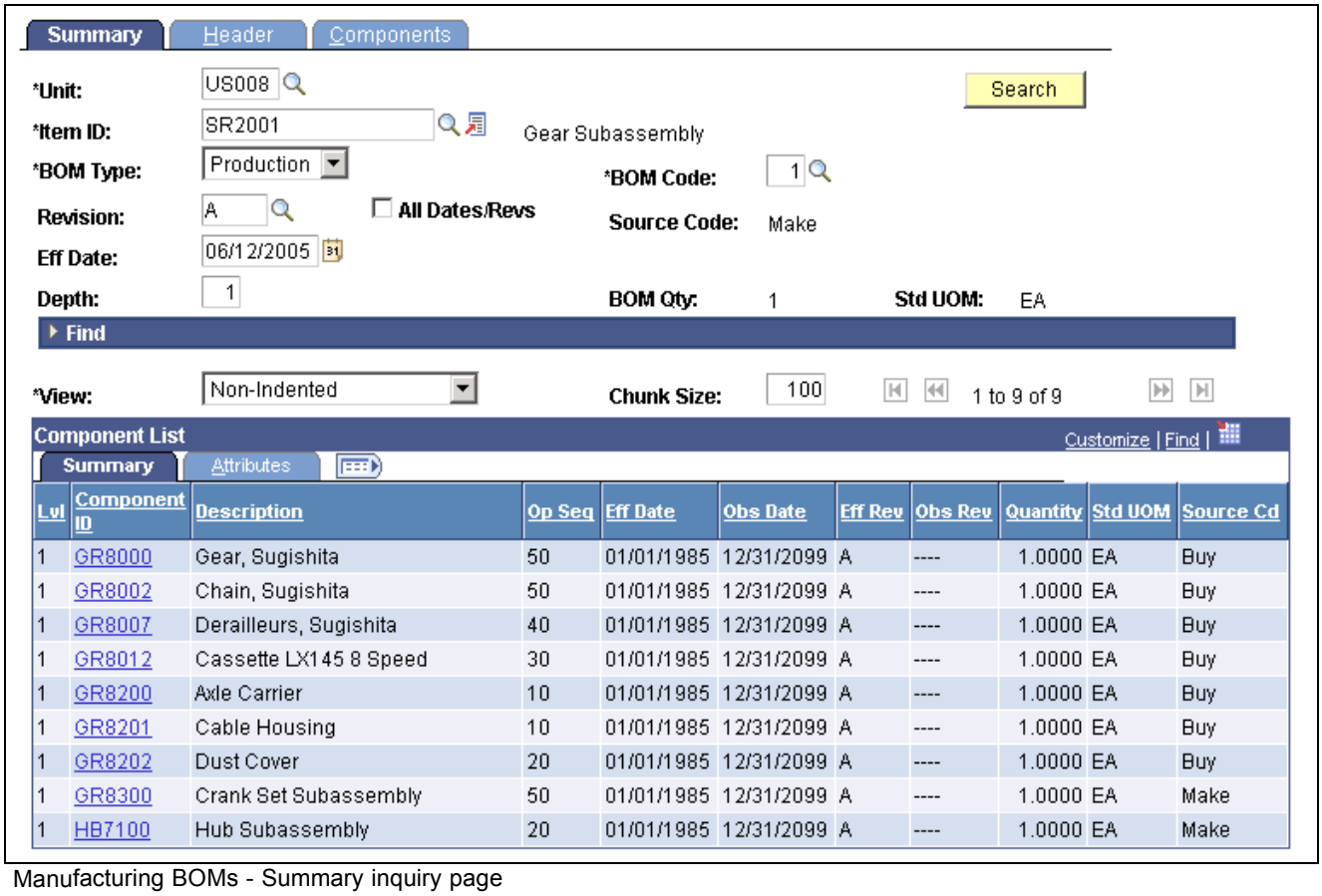
See Also

Chapter 8, "Maintaining Bills of Material," page 89

Appendix B, "PeopleSoft Manufacturing Report Descriptions," ENS1000 - BOM Report, page 593

Displaying BOM Structures

Access the Manufacturing BOMs - Summary page.



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 - Summary inquiry page

Unit, Item ID, BOM Type, BOM Code, Eff Date (effective date), **Revision** Enter the basic information about the BOM.

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Depth Enter the number of levels that you want to view by specifying the depth. If you select a depth of *1,* 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 the 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.

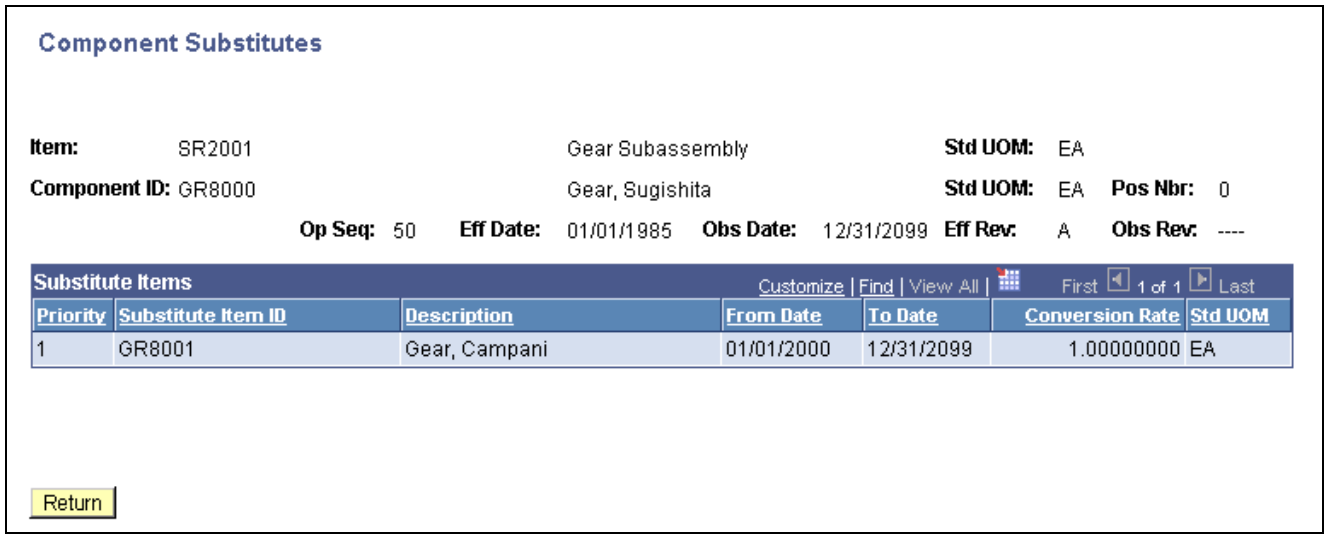
Attributes Tab

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 inquiry page

Substitutes and related data such as Conversion Rate and effectivity dates appear in order of priority.

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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 111

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.

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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.

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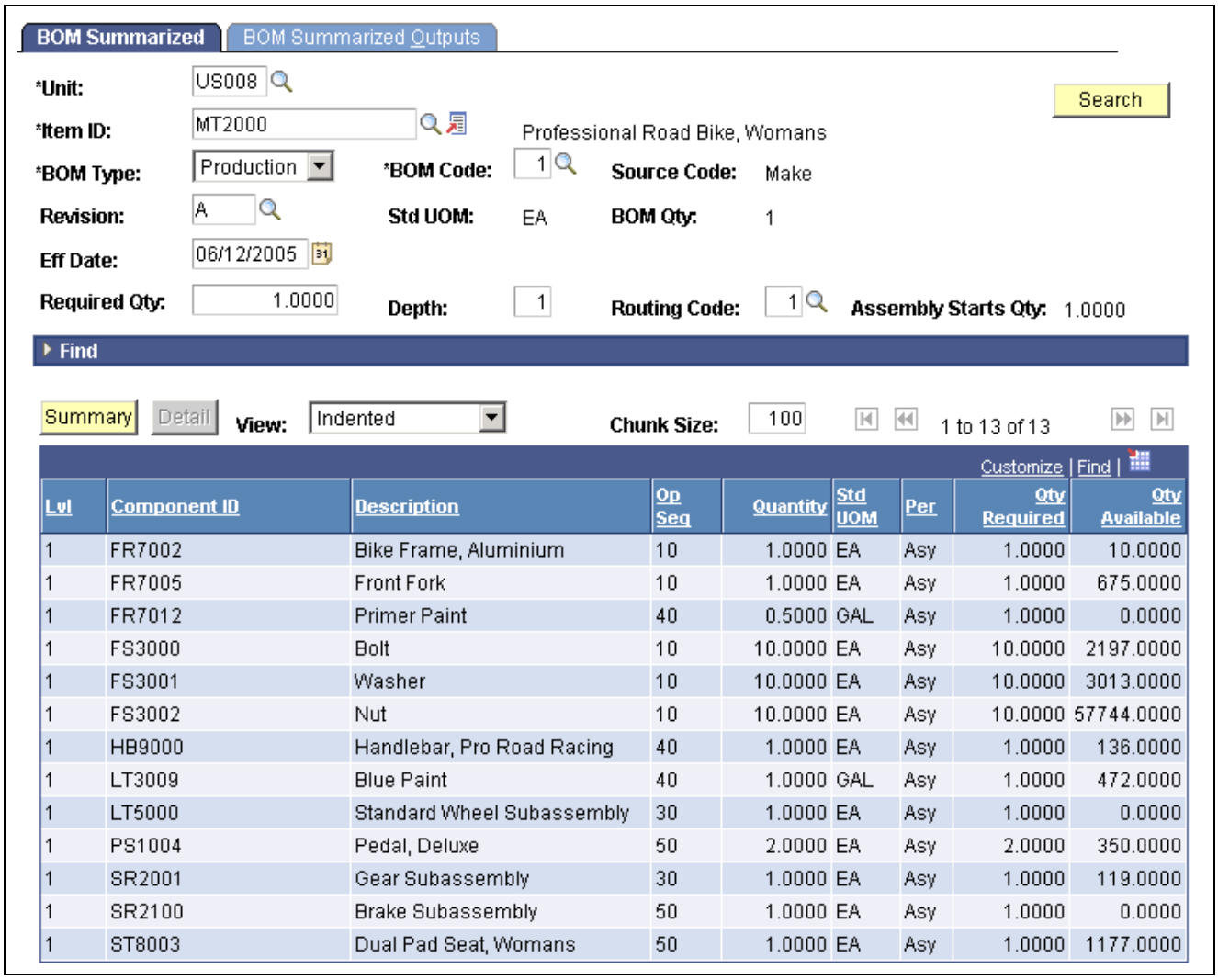

Lvl	Component ID	Description	Op Seq	Quantity	Std UOM	Per	Qty Required	Qty Available
1	FR7002	Bike Frame, Aluminium	10	1.0000	EA	Asy	1.0000	10.0000
1	FR7005	Front Fork	10	1.0000	EA	Asy	1.0000	675.0000
1	FR7012	Primer Paint	40	0.5000	GAL	Asy	1.0000	0.0000
1	FS3000	Bolt	10	10.0000	EA	Asy	10.0000	2197.0000
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 inquiry page

Unit, Item ID, BOM Type, BOM Code, Eff Date (effective date), and **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

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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: ((Required Qty / BOM Qty) × Output Quantity).

Displaying BOM Costs

To create cost versions, use the Cost Versions component.

See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*, “Defining the Cost Foundation for Makeable Items”.

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.

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- 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 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 Enterprise Cost Management 9.0 PeopleBook, "Defining the Cost Foundation for Makeable Items"

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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 597

Displaying BOM Summary Costs

Access the Costed BOM page.

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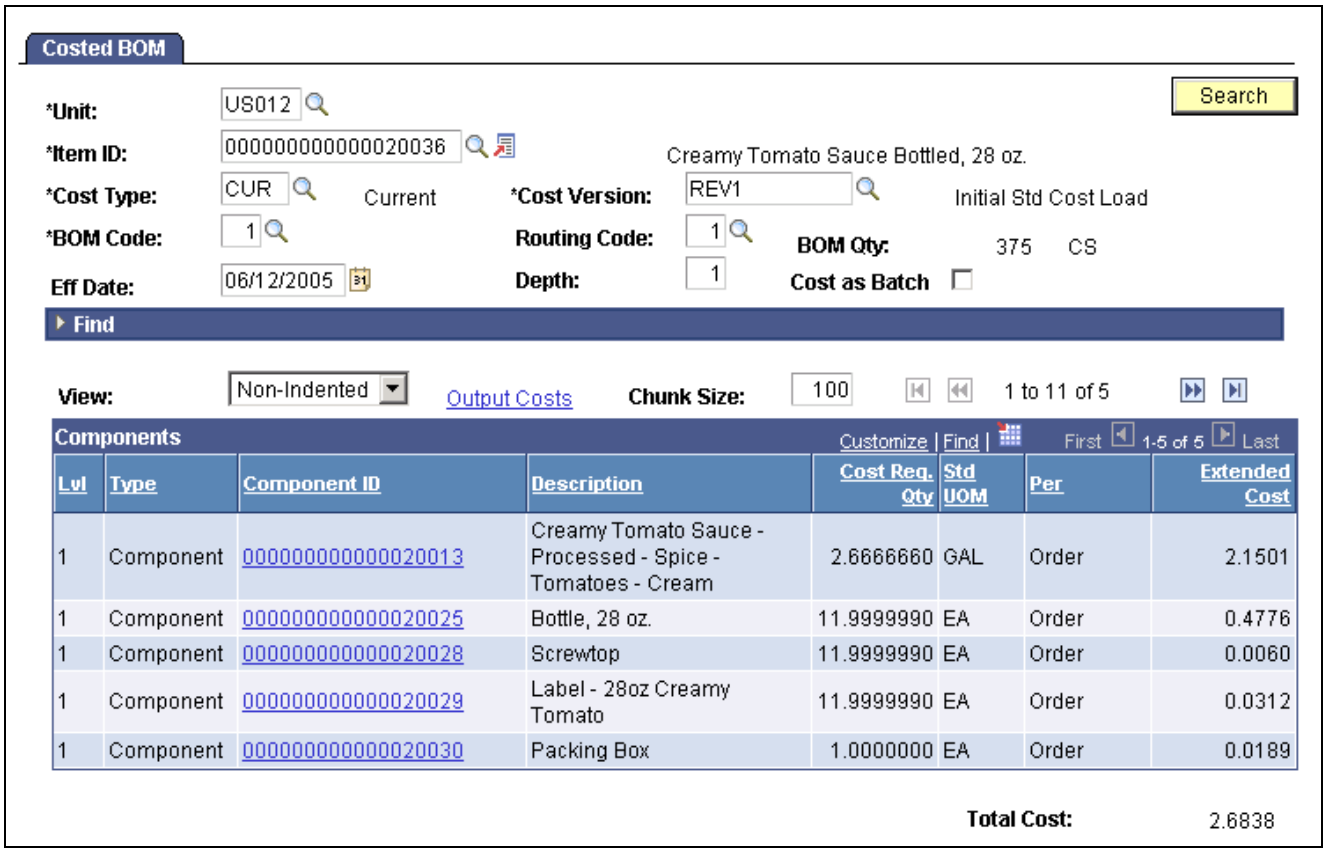

Costed BOM inquiry page

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.

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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 *recycle* by-product, then the cost is negative; if it's a *waste* 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:

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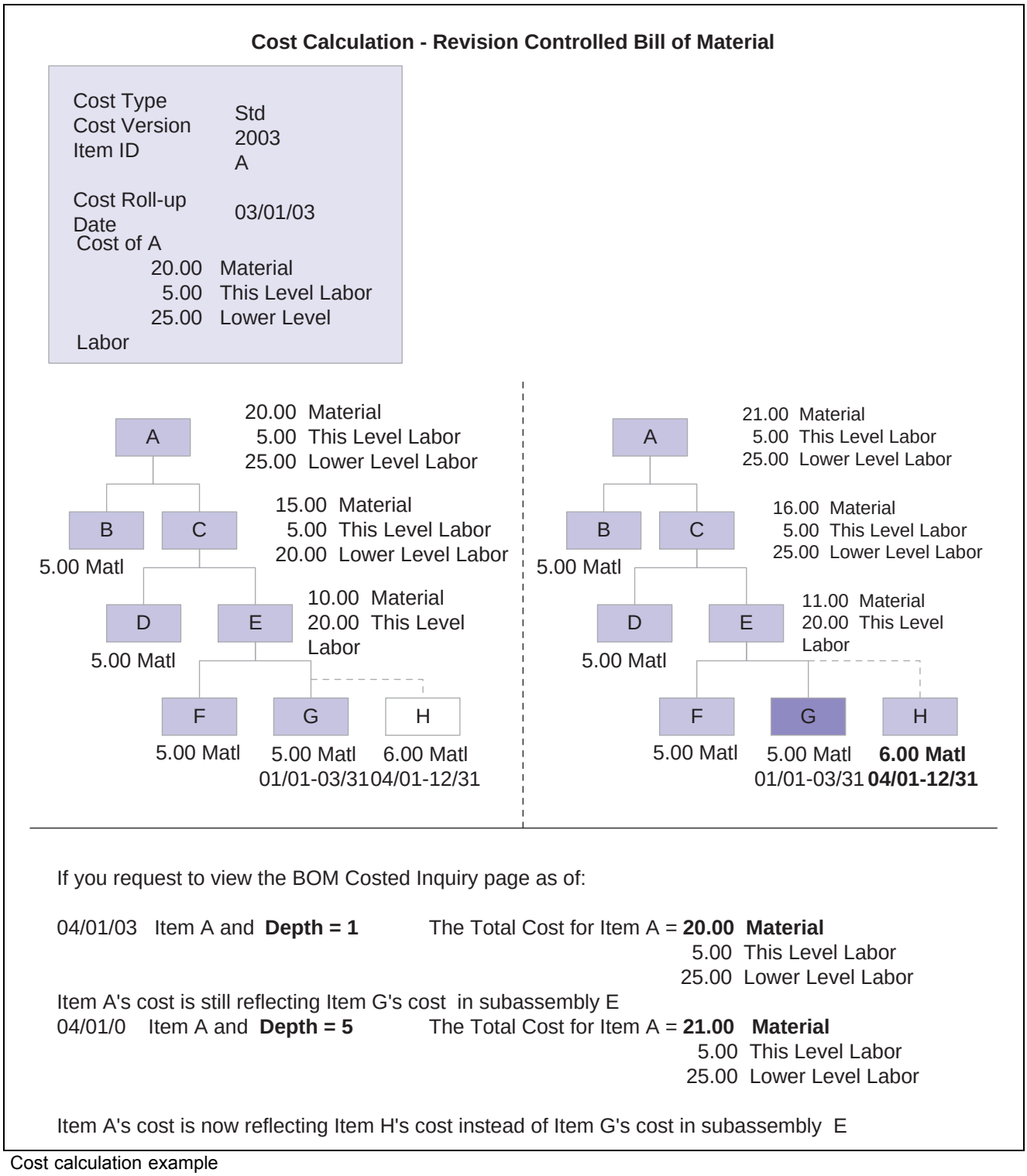

Cost calculation example

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 Enterprise Cost Management 9.0 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.

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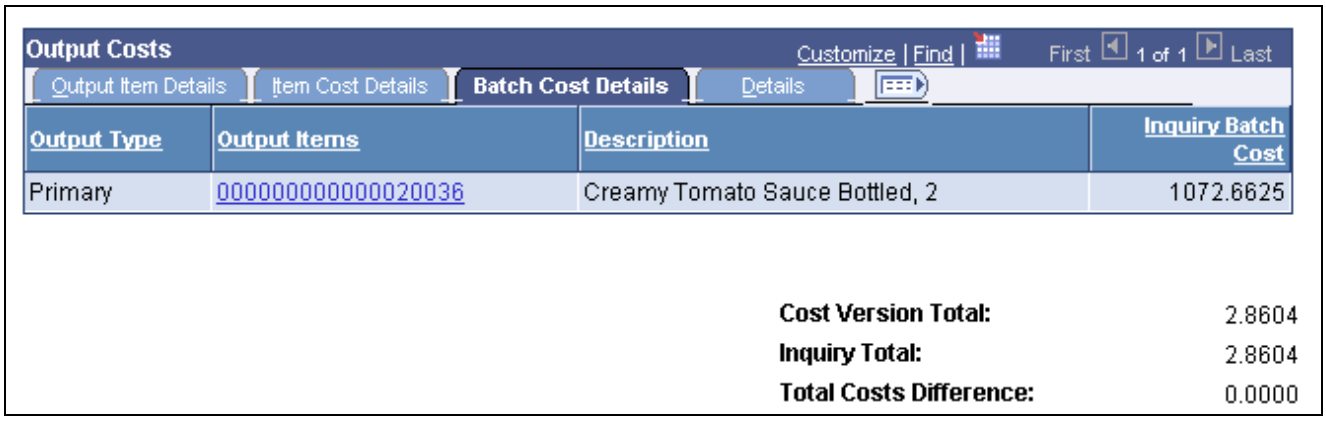

Output Costs page: Batch Cost Details tab

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

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 96

Chapter 8, "Maintaining Bills of Material," Defining BOM Outputs, page 111

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.

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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 Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Setting 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.

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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.
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.

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Page Name	Object Name	Navigation	Usage
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 Enterprise Engineering 9.0 PeopleBook, "PeopleSoft Engineering Reports," ENS1005 - Compare BOMs Report

Displaying BOM Comparisons

Access the Compare BOMs - BOM Selections page.

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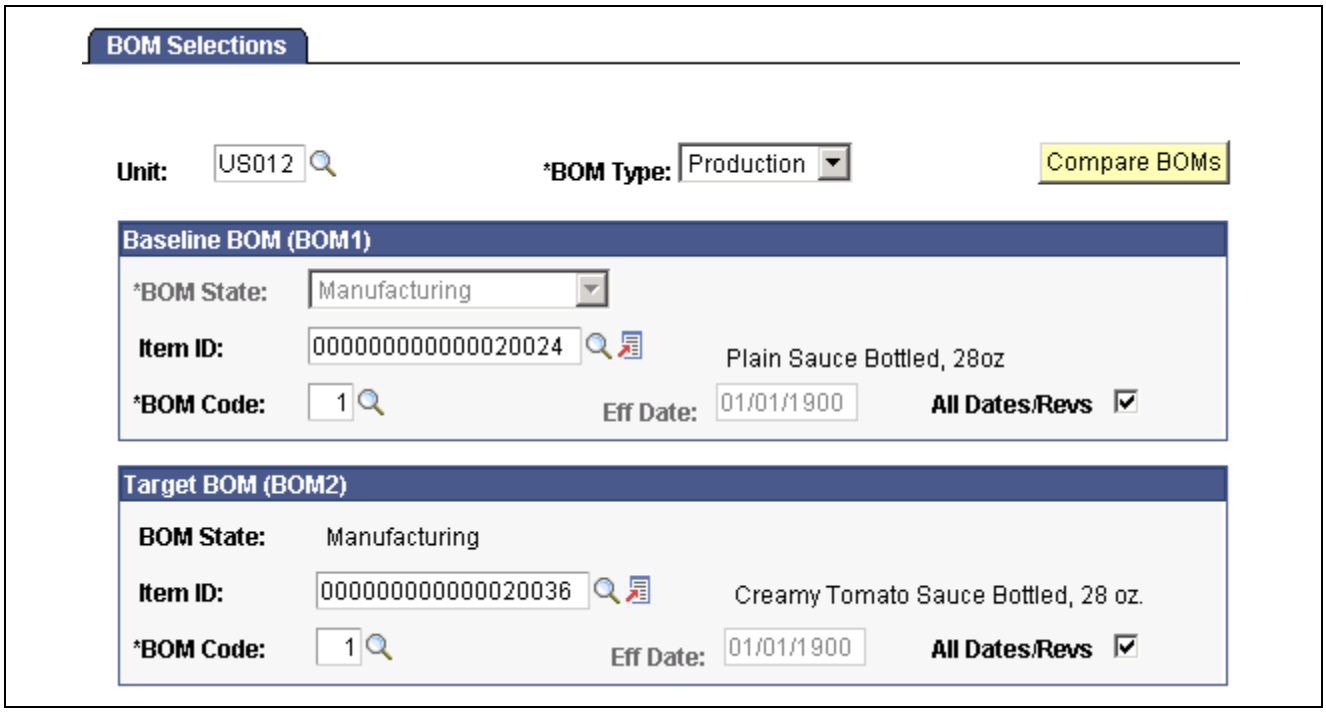

Compare BOMs - BOM Selections inquiry page

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.

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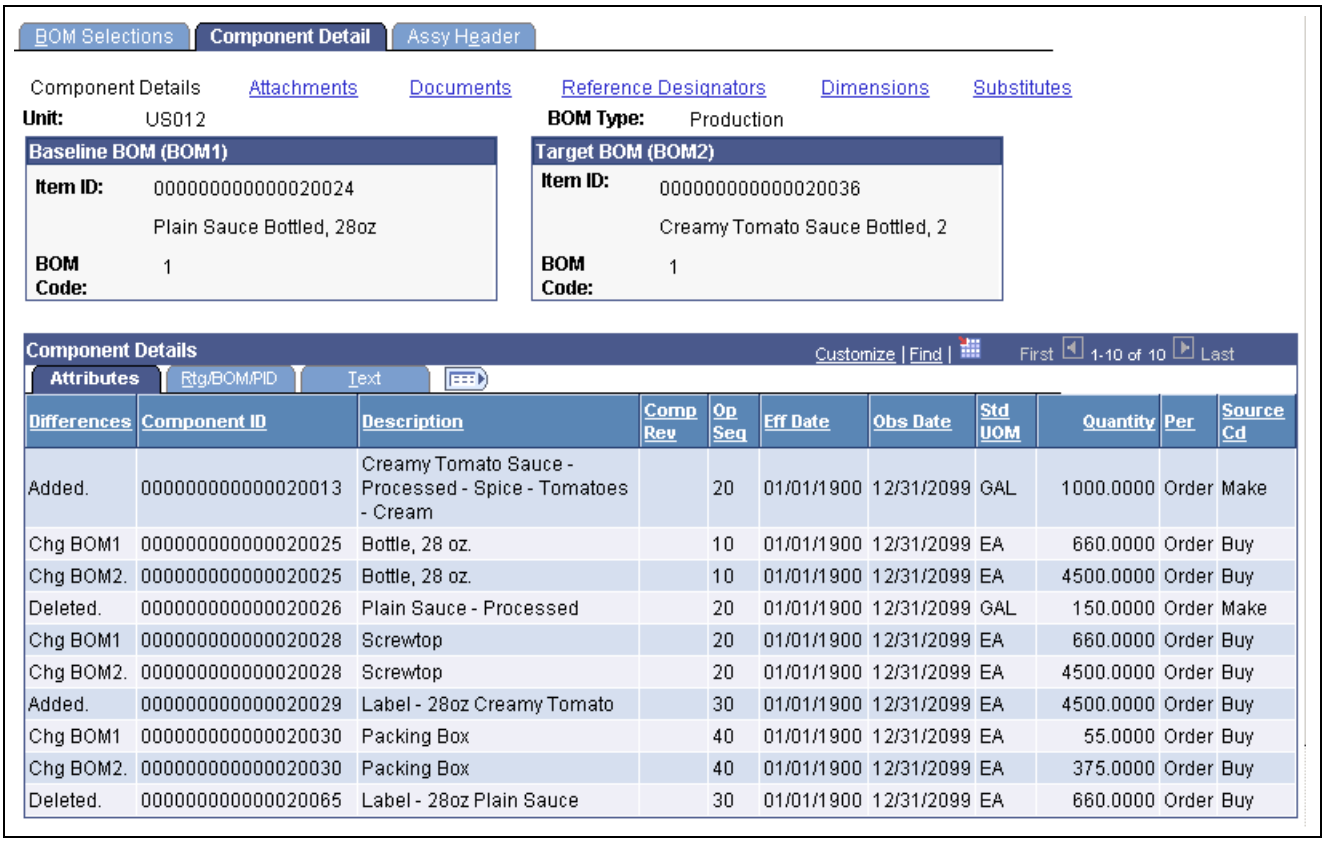
BOM Selections | Component Detail | Assy Header

Component Details | Attachments | Documents | Reference Designators | Dimensions | Substitutes

Unit: US012 **BOM Type:** Production

Baseline BOM (BOM1)

Item ID: 000000000000020024

Plain Sauce Bottled, 28oz

BOM Code: 1

Target BOM (BOM2)

Item ID: 000000000000020036

Creamy Tomato Sauce Bottled, 2

BOM Code: 1

Component Details Customize | Find | First 1-10 of 10 Last

Attributes | Rtg/BOM/PID | Text

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

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 121

Comparing Substitute Item Differences

Access the Compare BOMs - Component Detail: Substitutes page.

Substitute Items Tab

The system displays the substitutes’ differences, including substitute item ID, description, and the original component ID.

Attributes Tab

The system displays the substitutes’ differences, including substitute item ID, operation sequence, effective date, standard unit of measure, and conversion rate.

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Comparing Assembly Outputs

Access the Compare BOMs - Assy Header: Outputs page.

Dates Tab

This page displays output date differences including information such as output type, output item, operation sequence, and effectivity dates.

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.

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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 and view item where-used information.

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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 Express	EN_ITEMWHERE_USED	Manufacturing Definitions, BOMs and Revisions, Review BOM Information, Item Where Used Express	Display all the BOMs on which a component is used. 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 Enterprise Engineering 9.0 PeopleBook, "PeopleSoft Engineering Reports," ENS2000 - Item Where Used Report

Selecting Item Where-Used Information

Access the Item Where Used page.

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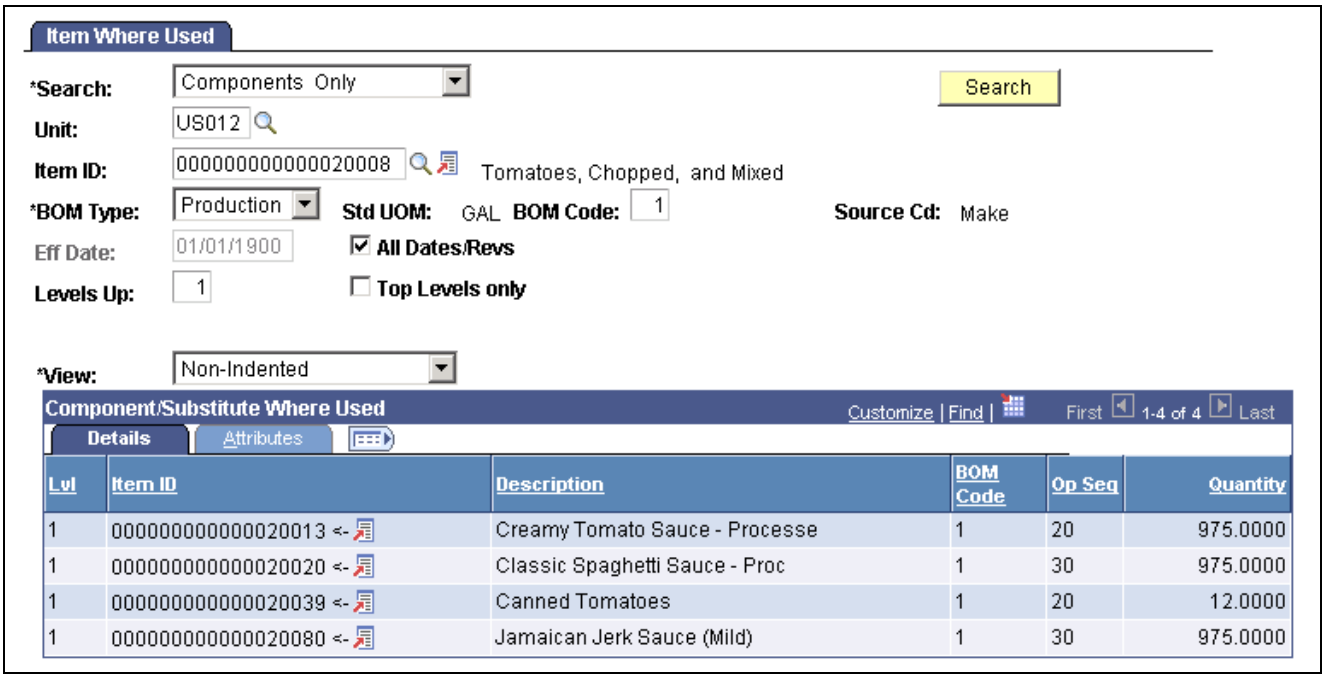

Item Where Used page

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 and **Top Levels Only** — 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.

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

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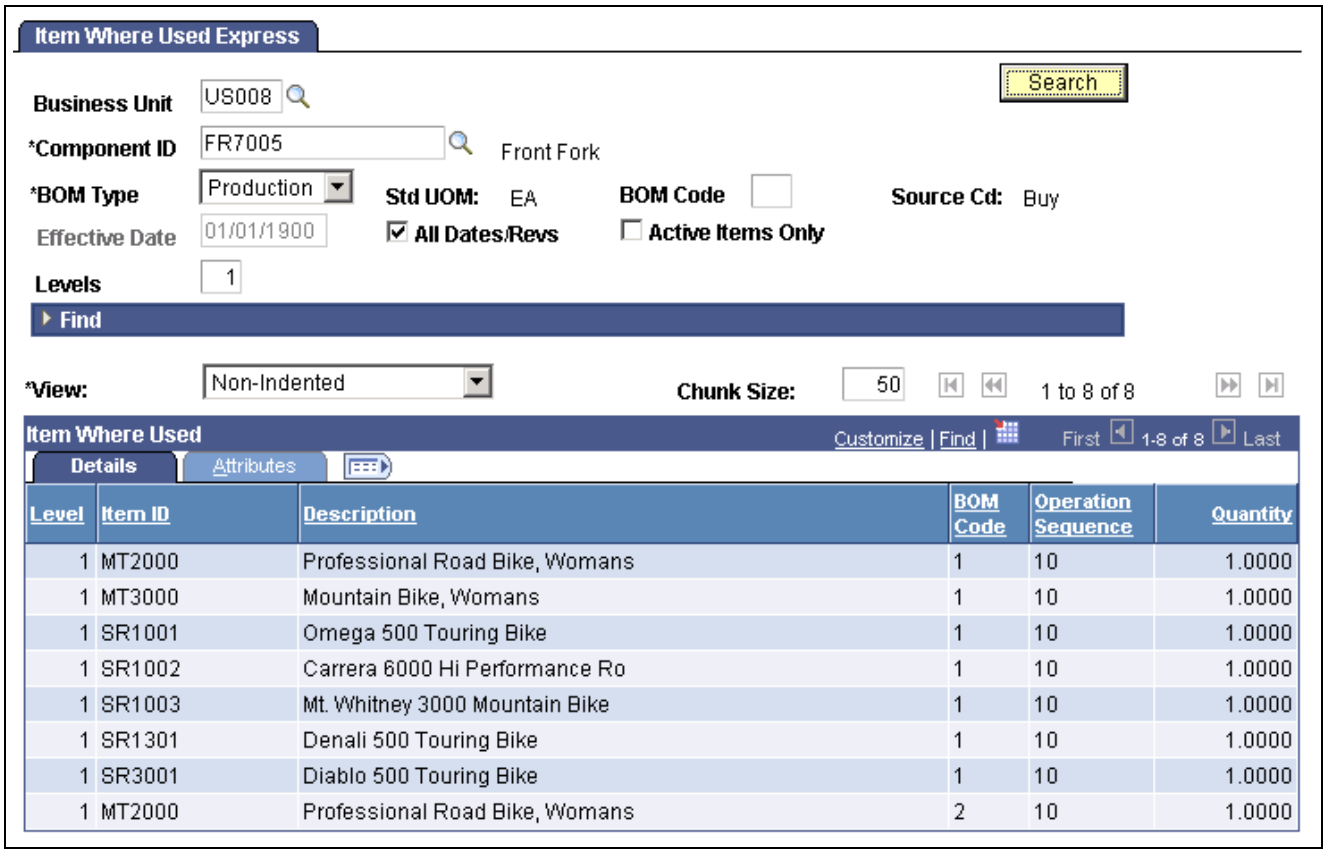
If the component is revision-controlled, a Comp Rev field also appears as a search parameter. If you enter a component revision, this page returns all assemblies where that component matches or is blank. If you leave the component revision blank, the inquiry returns assemblies that use any revision of the component.

See Also

Chapter 2, "Understanding PeopleSoft Manufacturing," Component Use Up, page 25

Viewing Item Where Used Express Information

Access the Item Where Used Express page.



Level	Item ID	Description	BOM Code	Operation Sequence	Quantity
1	MT2000	Professional Road Bike, Womans	1	10	1.0000
1	MT3000	Mountain Bike, Womans	1	10	1.0000
1	SR1001	Omega 500 Touring Bike	1	10	1.0000
1	SR1002	Carrera 6000 Hi Performance Ro	1	10	1.0000
1	SR1003	Mt. Whitney 3000 Mountain Bike	1	10	1.0000
1	SR1301	Denali 500 Touring Bike	1	10	1.0000
1	SR3001	Diablo 500 Touring Bike	1	10	1.0000
1	MT2000	Professional Road Bike, Womans	2	10	1.0000

Item Where Used Express page

Business Unit, Component ID, BOM Type, BOM Code,Effective Date and **Levels** — Enter this information about the item, as appropriate.

All Dates/Revs (Revisions) — Select to search for components with all dates and revisions. Selecting this inactivates the Effective Date field.

Active Items Only — Select to only include active items. The system disregards inactive items while searching if this is selected.

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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:* The new resource 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 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 page and the Define Tool page.

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2. Define tools as a noncosted 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 the asset balance.

See Also

Chapter 7, “Understanding PeopleSoft Bills of Material and Routings,” page 83

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Item Control Values”

Defining Resources

To define resources, use the Define Crew Resource (EN_CREWS), Define Machine Resources (EN_MACHINES), and the Define Tool Resource (EN_TOOLS) components.

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.

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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 the 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 the 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.

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See Also

Chapter 4, "Establishing Production Calendars," Defining Calendar Codes, page 48

Defining Machine Attributes

Access the Machines - Define Machine page.

Machine Status Values are:

- *Available:* The machine is available for use.
- *In Repair:* The 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): The 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 create a link to 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 Enterprise Asset Management 9.0 PeopleBook, "Adding and Maintaining Assets"

PeopleSoft Enterprise Asset Management 9.0 PeopleBook, "Managing Asset Maintenance, Repair, Warranties, and Insurance"

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

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- 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:

- *Available:* The tool is available for use.
- *In Repair:* The tool is in repair, but you can associate it with work centers, tasks, routings, and production.
- *Pending:* A new tool is not yet approved for use in production and cannot be associated with work centers.
- *Sched Maint:* The 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 *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 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 noncosted 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.

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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 access 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 access 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. Before clicking the Search button, you can change the selected resources that are populated by the previous page.

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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	View where-used information about resources on work centers, tasks, routings, and in production.

See Also

Appendix B, “PeopleSoft Manufacturing Report Descriptions,” ENS1004 - Resources Where Used Report, page 595

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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 center information.

See Also

Chapter 7, "Understanding PeopleSoft Bills of Material and Routings," page 83

Understanding Work Centers

A work center can consist of one or more people and machines, and it 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 where the operation or task takes place. Additionally, you can assign resources (crews, machines, or tools) to each work center.

Prerequisites

Before you begin to fully use the work center functionality, complete these setup steps:

1. If you want to associate different resources to work centers, you must define the resources before 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 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. Because you must associate a WIP inventory location with each work center, these inventory locations must be defined before adding work centers.

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See Also

Chapter 11, “Defining Resources,” page 185

Chapter 3, “Defining Your Business Unit Structure,” Setting Up Manufacturing Business Unit Options, page 32

PeopleSoft Enterprise Cost Management 9.0 PeopleBook, “Defining the Cost Foundation for Makeable Items”

Common Element Used in This Chapter

Work Center Displays the 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). To define overhead rates, use the Overhead Rates component.

See *PeopleSoft Enterprise Cost Management 9.0 PeopleBook*

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. Associate conversion codes with work centers.
5. Associate conversion overhead codes with 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 581

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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 associated with 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.

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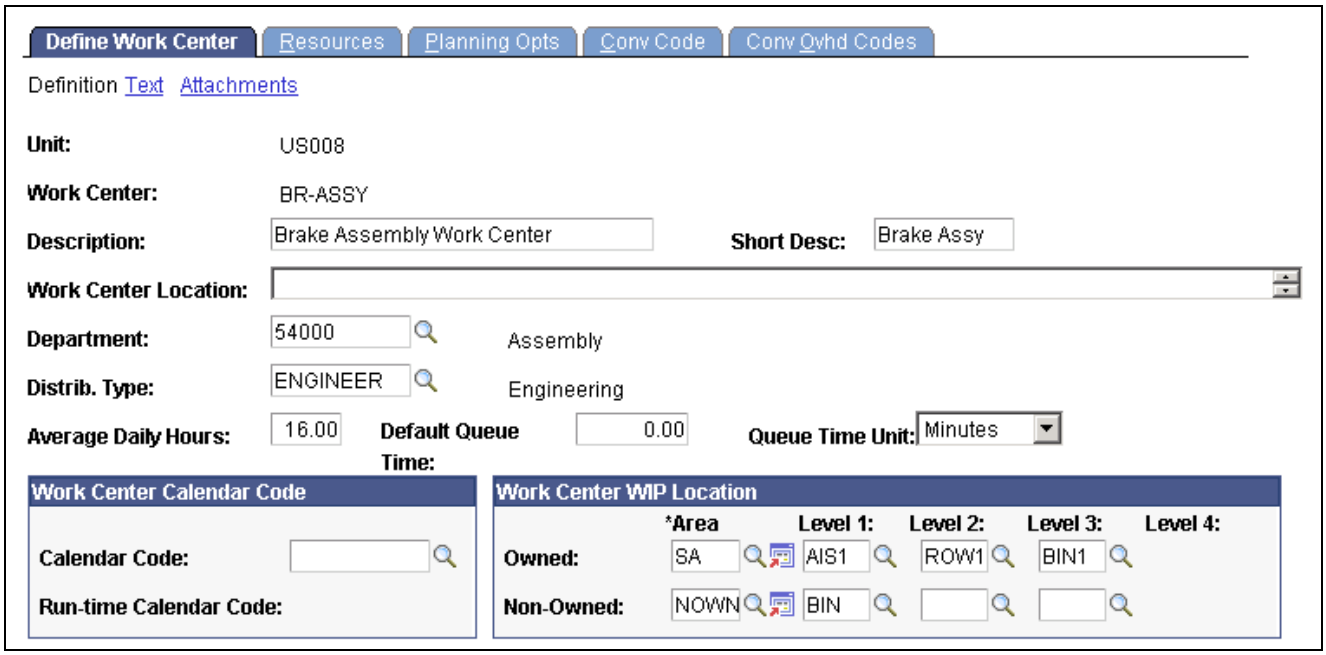

Define Work Center - Definition page

Before defining routings, you can define a master dictionary of tasks or jobs that can be performed at work centers.

Department (Optional) Enter the department code, which is informational only and is 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, the distribution types can determine the general ledger accounts when posting earned conversion costs, such as labor, machine, subcontracting, and overhead costs.

The distribution type appears by default as the value defined in PeopleSoft Inventory for the transaction group for earned conversion costs.

Average Daily Hours Enter the 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 Enter 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 Designate whether the default queue time is in *Minutes, Days,* or *Hours*.

Note. If you change the average daily hours and the run rates on routing operations are expressed in units-per-day, revisit all routing operations that use the work center and adjust the run rates accordingly.

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Note. The Default Queue Time field and the Queue Time Unit field do not appear if you use 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 lease one calendar code and the associated calendar. You can define alternate calendar codes with alternate calendars. A calendar code entered here indicates that the work center has different hours of operation from the business unit.

If you enable PeopleSoft Workflow and 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 Displays which calendar code is used for scheduling the work center.

When you associate a calendar code that is different from the current runtime 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 is specified for the work center.

See Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581.

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, production area, or 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 issue non-owned inventory to production, you can leave these fields blank.

Note. If you use consigned components, you must define both an owned location and a non-owned location. Consigned components are consumed from a non-owned location but, once consumed, can only be returned to an owned location.

See Also

PeopleSoft Enterprise Cost Management 9.0 PeopleBook

Chapter 4, "Establishing Production Calendars," Defining Calendar Codes, page 48

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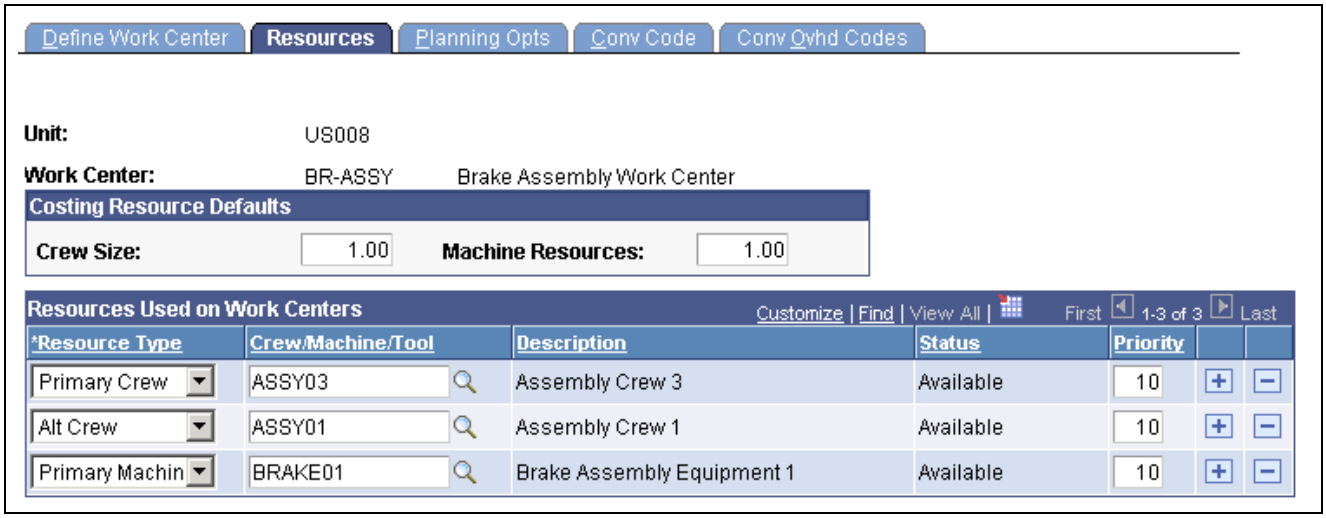
Defining Work Center Resources

Access the Resources page.



Define Work Center Resources page

Costing Resource Defaults

Crew Size (Optional) Enter the number of people at the work center. This value appears by default from the primary crew specified in the work center definition.

Machine Resources (Optional) Enter the 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.

Although these are optional fields, the system uses the crew size and machine resources information when it calculates standard labor and machine costs for items in the standard cost calculations.

In some cases, the system also uses crew size and machine resources when it calculates the per unit cost of an item, as well as the earned labor and machine amounts in 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 uses the crew size in the calculation.

The system only uses crew size and machine resources for runtime 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, consider these equations. For setup time operations, the item's cost calculation equation is:

(Setup labor or machine rate per hour) × (Setup time [in hours]) = Setup cost

(Setup cost) ÷ (Item's average order quantity) = Per unit setup 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.

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For runtime 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) × (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) × (Labor rate for run) × (Run time [in hours]) = Labor run cost
Machine	(Machine resources) × (Machine rate for run) × (Run time [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 and **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	Enter a whole-number ranking to indicate which resource has preference over others 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 setting enables you to designate the order in which PeopleSoft Supply Planning uses resources.

If you use 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 Define Work Center - Planning Opts page.

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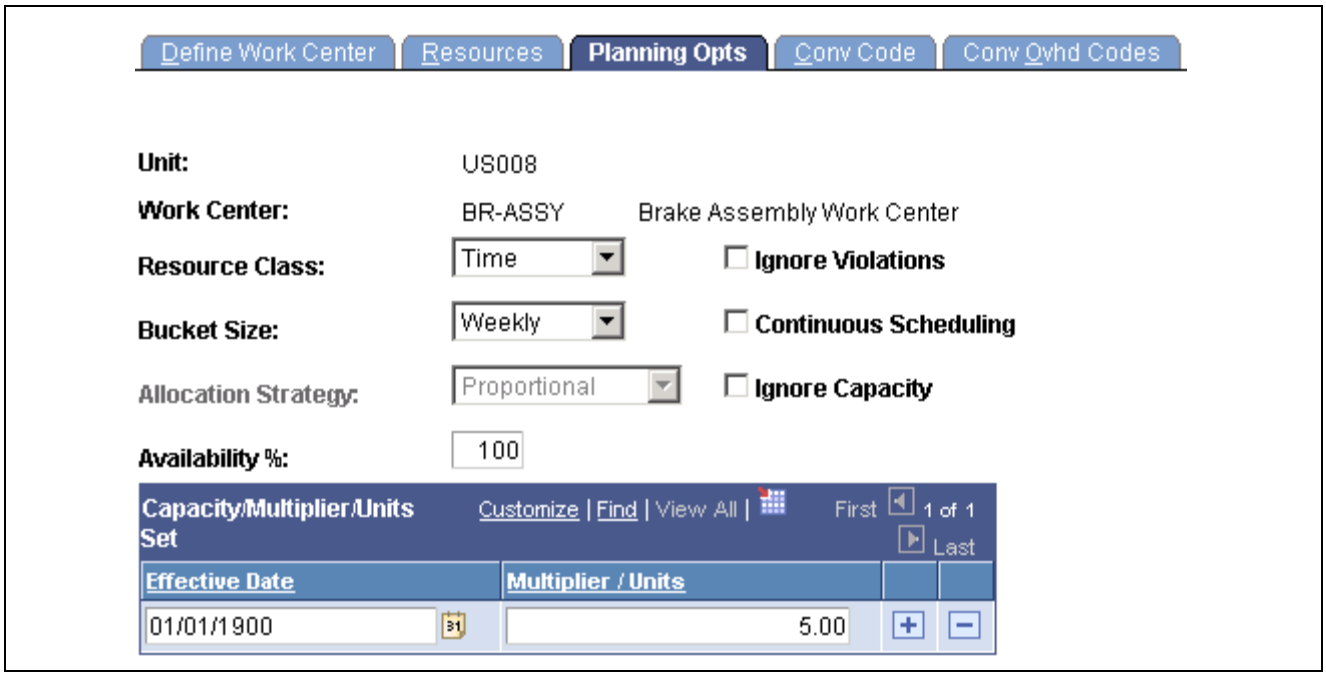

Define Work Center - Planning Opts page

Resource Class

Because work centers are modeled as aggregate resources in PeopleSoft Supply Planning, define each 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 the summation period, the period over which you are aggregating. Values are *Daily, Weekly,* and *Monthly.* The default is *Weekly.*

Allocation Strategy

Enter a value to specify how you plan to spread the time and unit over the bucket size. Values are *Start, Finish,* and *Proportional.* This determines whether if the task is stretched across two or more buckets—in its entirety—is 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 *100.*

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 PeopleSoft Supply Planning Violations workbench if they are before the capacity fence defined for the planning instance. By selecting the Ignore Violations check box on noncritical work centers, you enable the solvers to ignore these work centers and focus on critical work centers for capacity repair.

Select this check box to generate what-if scenarios.

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Continuous Scheduling Select to complete the corresponding operation in a single run of continuous valid calendar time, with no gaps allowed between shifts. This field is used as a routing operation default.

Ignore Capacity Select to prevent solvers from considering the corresponding operation as required capacity for the work center. This field is used as a routing operation default.

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 grid 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, 2005. Then, beginning on March 5, 2005, PeopleSoft Supply Planning treats 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 calendar of 24 hours per day, seven days per week, 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, 2005, then, beginning on April 10, 2005, PeopleSoft Supply Planning treats this work center as being capable of producing 100 units per week (based on a calendar of 24 hours per day, seven days per week). The actual available capacity for 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 units × 40 hours per week) ÷ (24 hours per day × 7 days per week) = 24 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 Define Work Center - Conv Code page.

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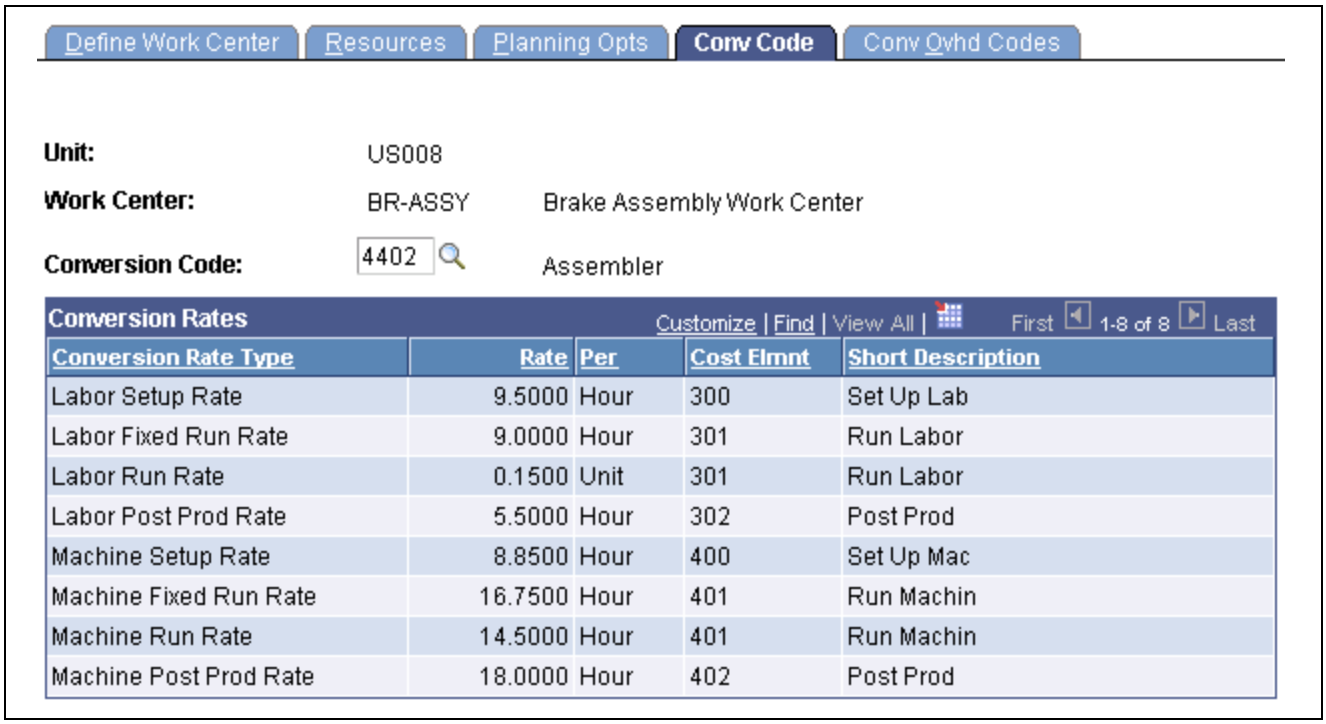

Define Work Center - Conv Code page

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. When production costs are updated using a selected cost type and version, the system copies the conversion rates and conversion overhead rates—which are used to calculate the item cost—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 Enterprise Cost Management 9.0 PeopleBook, "Defining the Cost Foundation for Makeable Items"

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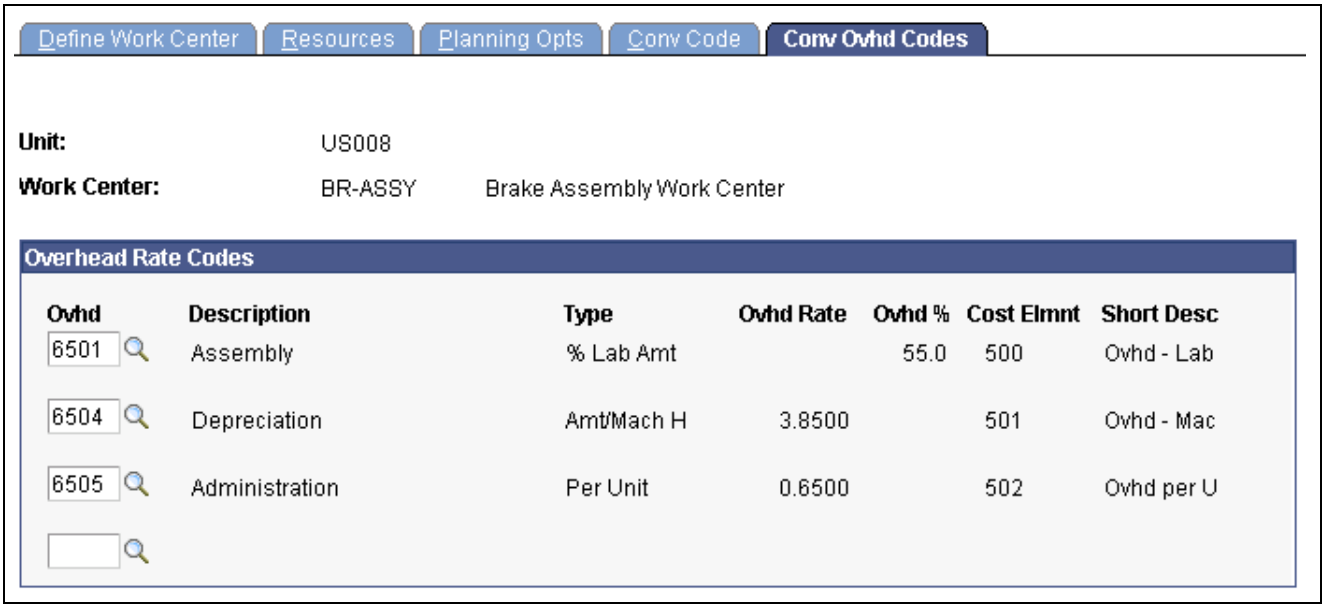
Associating Conversion Overhead Codes to Work Centers

Access the Define Work Center - Conv Ovhd Codes page.



Define Work Center - Conv Ovhd Codes page

Enter the overhead code that you want to associate with the work center. The system displays the overhead rates from the Conversion Ovhd Codes page. The rates appear from the frozen conversion overhead rates and costs that were updated during the last cost update and revaluation. When production costs are updated using a selected cost type and version, the system copies the conversion rates and conversion overhead rates—which are 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 uses the work center.

See Also

PeopleSoft Enterprise Cost Management 9.0 PeopleBook, "Defining the Cost Foundation for Makeable Items"

Creating Work Center Groups

To create and maintain work center groups, use the Work Center Groups (EN_WC_GRP) component.

PeopleSoft Manufacturing enables you to define work center groups. That way, in PeopleSoft Supply Planning you can 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

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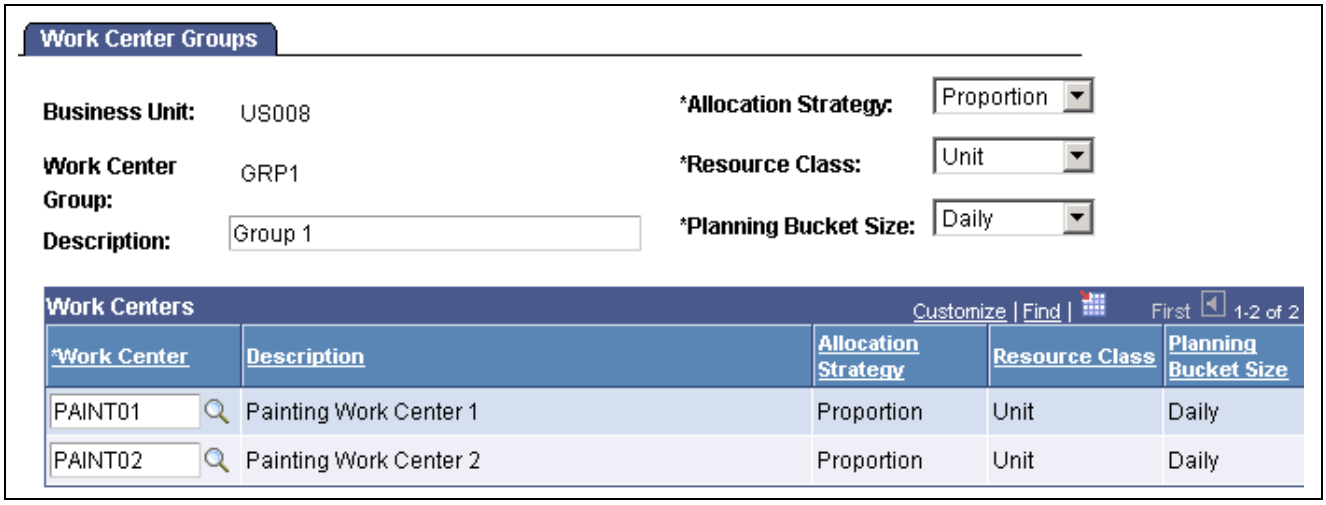
- Bucket size

Page Used to Create 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 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 displays the choice that mirrors the page; for example, the value is initially *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.*

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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 current page with data, after you click the Search button.

If you select something other than the default or *Search All,* you access the page that corresponds with your choice. For example, if you are on the Work Centers Used on Tasks page and you select *Only Routings,* you access 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 597

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.

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Select the Count Point check box if the operation step is a count point. Count points enable 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 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 operation sequence 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 226

Copying Work Centers

Rather than entering new work centers from scratch, you can copy a work center 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 specified business unit.

This section discusses how to:

- Copy work centers.
- Copy work center WIP locations.

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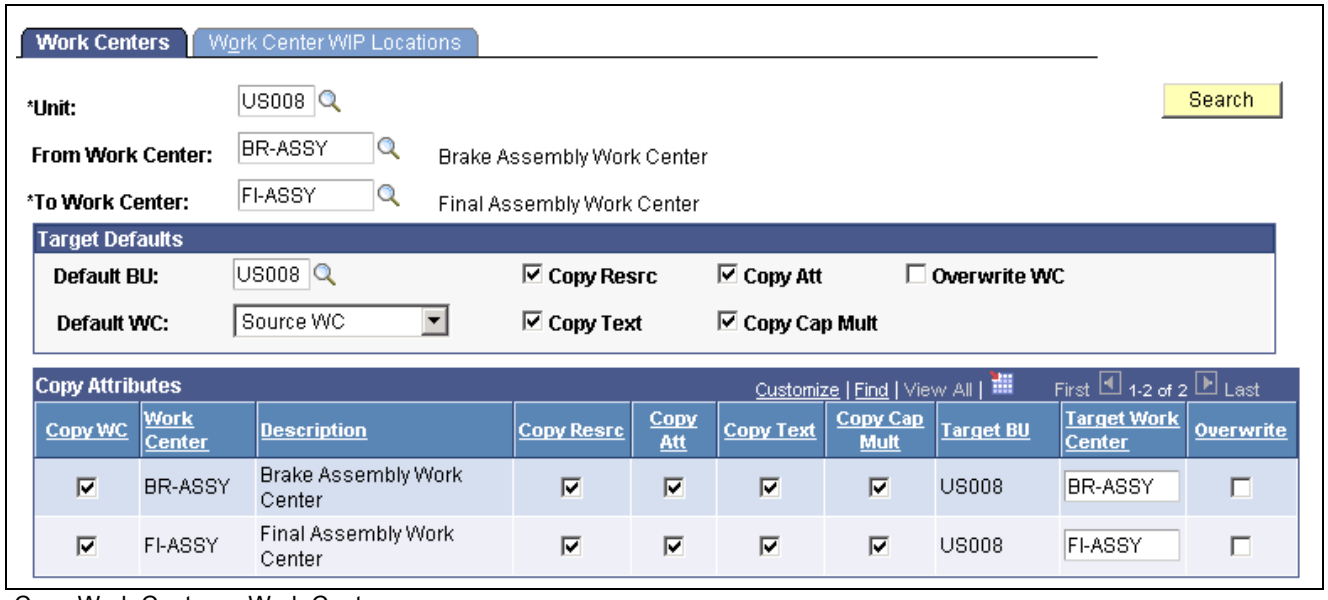
Pages Used to Copy Work Centers

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.



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 business unit.

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.

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Copy Attributes

You can copy the resources, text, and associated attachments from the source work center to the target work center. You can make the default that you want to overwrite an existing target work center 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 the selections on an individual basis, including clearing the Copy WC check box, if you decide not to copy the original work center.

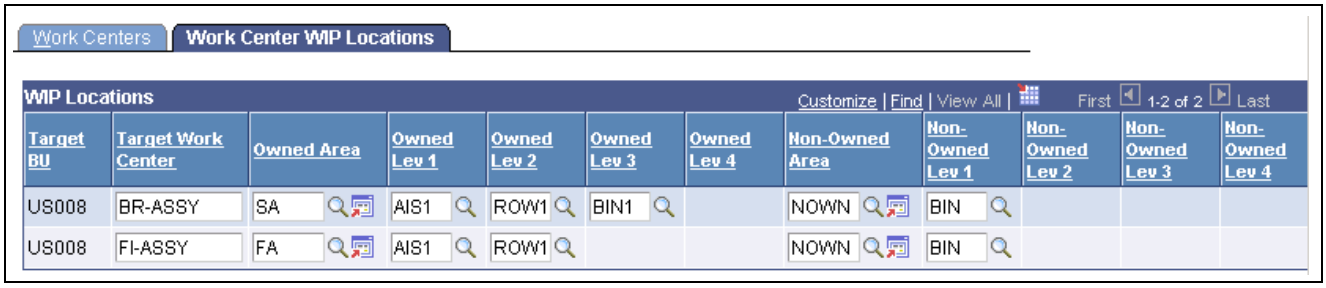
If you select *Leave Blank* as the default work center in the page header, enter the work center codes for the target business unit. If the target work center already exists in the target business unit, and you select the Overwrite check box, the system deletes all existing target work center data and 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 on the Work Center WIP Locations page.

Note. If you copy the resource 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.



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 (level 2), Lev 3 (level 3), and Lev 4 (level 4), defined for each storage area.

Save The copy is completed when you click Save.

See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Structuring Inventory"

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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 a 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. Before setting up tasks, you can define resources (crews, machines, and tools), and associate them with 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 Enterprise Cost Management 9.0 PeopleBook, "Defining the Cost Foundation for Makeable Items"

Common Elements Used in This Chapter

Task Code Displays a unique identifier for the specified task.

Work Center Displays a unique identifier for the specified 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 to have the system 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 to have to system add the same set of costing times and rates for planning.

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Defining and Maintaining Tasks

To define and maintain tasks, use the Task Definition (TASKS1) component.

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 copies the associated task information into the item's routing. At the routing level, you can change any attribute of 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. (Optional) Define task resources.
3. Define task operation times.
4. (Optional) 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 581

Pages Used to Define and Maintain Tasks

Page Name	Object Name	Navigation	Usage
Define Task - 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.
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.

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Page Name	Object Name	Navigation	Usage
Attachments	EN_TASK_ATT	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Attachments	Specify task attachments.
Define Task - Resources	EN_TASK_RESOURCE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Resources	(Optional) Define task resources.
Define Task - 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.
Define Task - Conversion Code	EN_TASK_CONCODE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Conversion Code	(Optional) Define conversion codes associated with the labor and machine rates for a task.
Conversion Overhead Code	EN_TASK_CONOHCODE	Manufacturing Definitions, Resources and Routings, Tasks and Work Centers, Define Tasks, Define Task, Conversion Ovhd Code	(Optional) 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	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	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	RUN_ENS1006B	Manufacturing Definitions, Tasks and Work Centers, Tasks Where Used Report	View 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.

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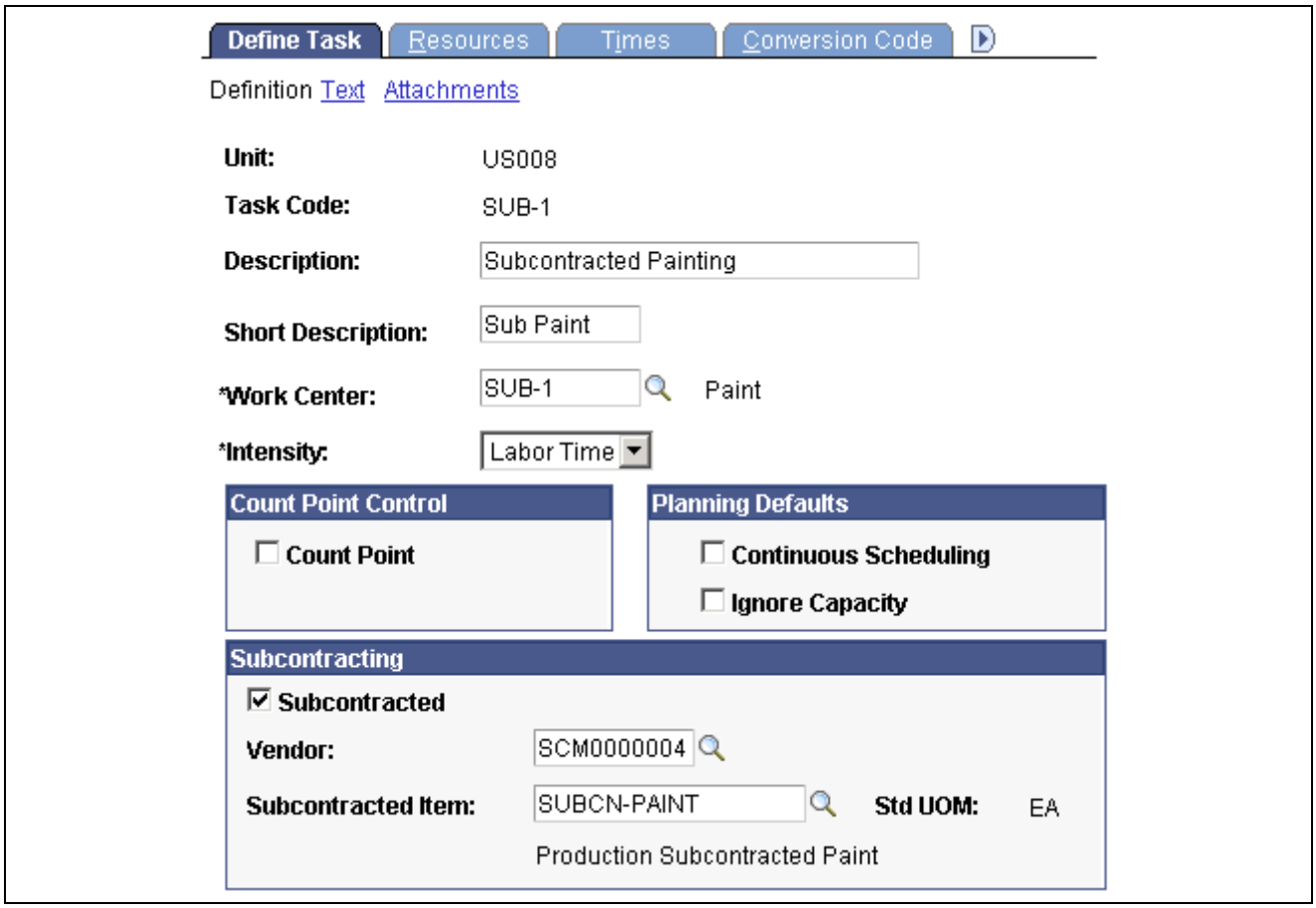

Define Task - Definition page

Before defining 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

Select to determine the basis of your scheduling. You can base the start and end date of the operation on the operation's labor time (if it is labor intensive) or machine time (if it is machine intensive). Alternately, you can base the start and end date on the longer of the two times or on the sum of the labor time and the machine time (that is, the cumulative time).

Note. If you define a task as subcontracted, the system sets the intensity to *Labor Time.*

Count Point

Select to make the task a count point operation. A count point indicates the operations on a routing that 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 by using 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 to change the routing.

Subcontracting

Subcontracted Select to specify a task this is performed by an outside subcontractor rather than in house. PeopleSoft Purchasing uses this information when creating subcontracted purchase orders.

If you select this check box, the Vendor and Subcontracted Item fields appear.

Vendor (optional) Select the vendor who will provide subcontracted services for this task. PeopleSoft Purchasing uses this information when creating subcontracted purchase orders.

Subcontracted Item (optional) Select the subcontracted item. If you select the subcontracted item and if you are using Enterprise Purchasing, then Enterprise Purchasing will generate a subcontracted purchase order for this specific subcontracted item.

Note. Subcontracted items are defined at a setID level.

See *PeopleSoft Enterprise Managing Items 9.0 PeopleBook*, "Defining Items by SetID".

See Chapter 25, "Subcontracting," page 529.

See Also

Chapter 14, "Structuring Routings," Defining Routing Operations, page 226

Chapter 23, "Completing Operations and Recording Scrap," Recording End Item Completions Using Count Points, page 474

PeopleSoft Supply Planning PeopleBook

Defining Task Resources

Access the Define Task - Resources page.

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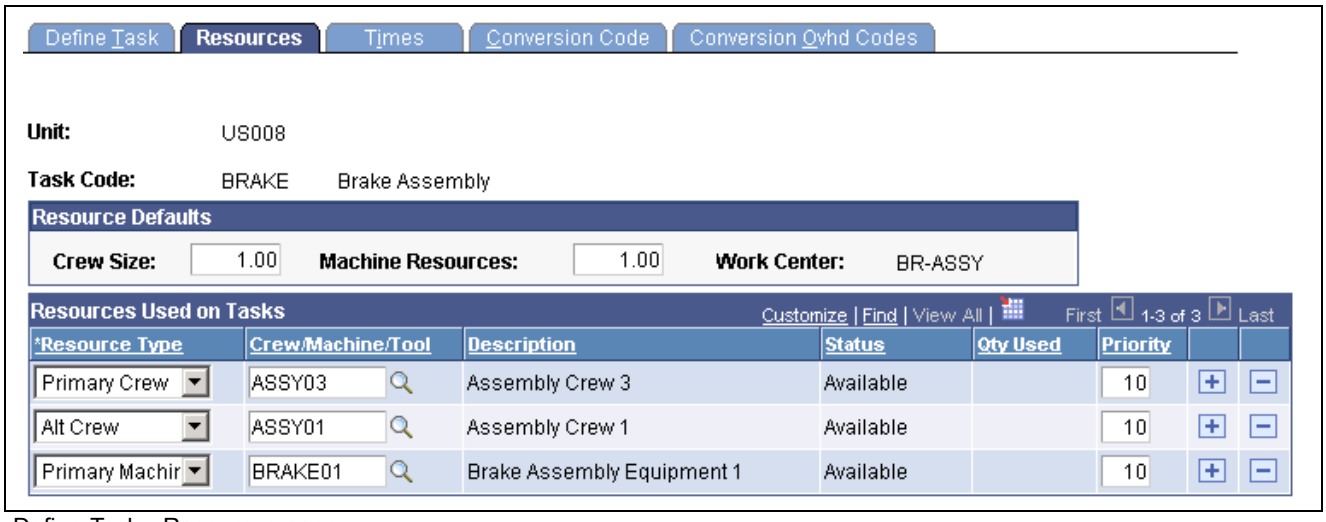

Define Task - Resources page

Resource Defaults and Resources Used on Tasks

The system copies the resource defaults, as well as the information from the Resources Used on Tasks field 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 for the work center. On the Define Task - Resources page, you can change those selections for the particular task.

Qty Used (quantity used) — When you select a *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 a 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 on the routing.

Note. Only one primary crew and one primary machine can be 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.

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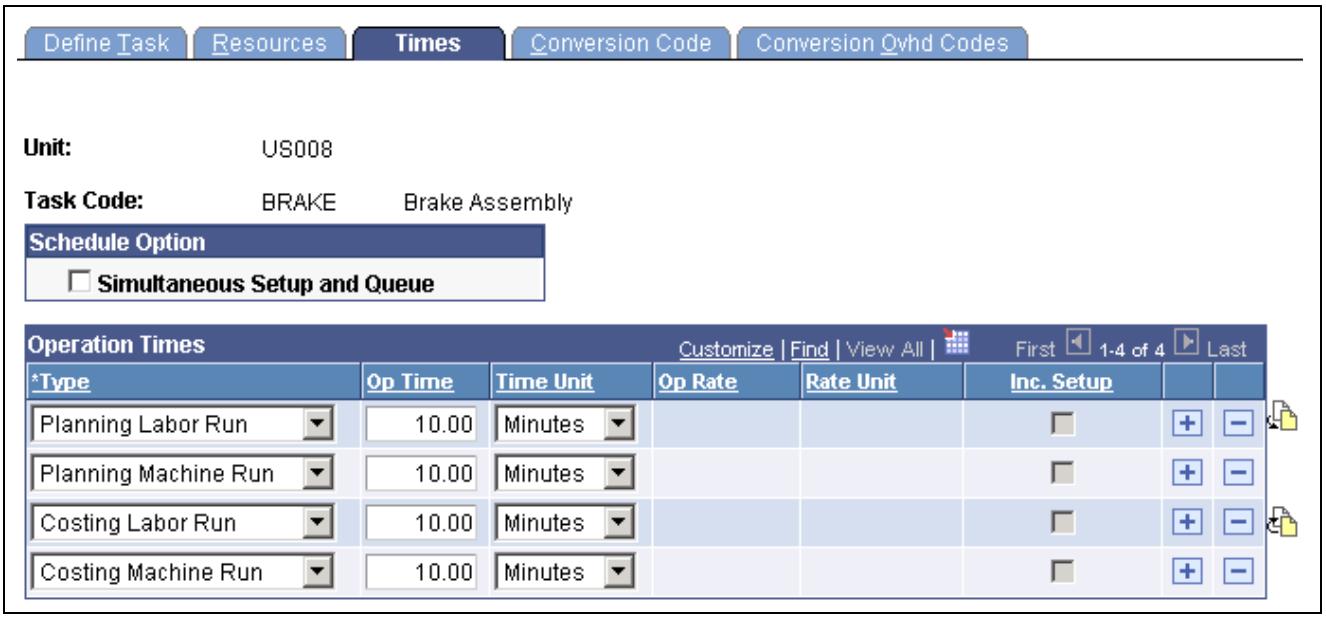

Define Task - Times page

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 in-transit 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 uses the longer of the two times when determining the lead time of an operation. When you associate a task with 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 This is 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 before the start of production. Express setup time in minutes, hours, or days. When the time is expressed in days, the system determines the number of operational hours in a day by using the average daily hours for the work center assigned to the task. When determining an operation's lead time, the scheduling function uses the setup time and does not factor in the number of units that must be processed. You can also 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.

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Run This is the amount of time necessary to process one unit, with the rate expressed in minutes, hours, or days. 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 This is 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 This is 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 that this occurs when the units have moved on to the next operation. The system includes 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 in-transit time in minutes, hours, or days. In-transit 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, in-transit, 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*

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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. You express setup, fixed run, post-production, queue, and in-transit times in terms of operation times. You can define a 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. Then, 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 does not update 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 the Inc. Setup (include setup) check box 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 before any production units arrive at the work center. Setup can occur at any time after the start of production, and the system does not include it as part of the item's lead time, except at the first operation. If you include setup, the setup time is factored into the task or operation's lead time. The system always includes 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 that 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 in-transit times, even if you have specified them for the task.

Costing Considerations

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 five hours defined on the task here, you should define a fixed run conversion rate (for example, 100.00 USD per hour) 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.

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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 the 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 193

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 operation sequence, along with the operation's start time and date and due date and time.

See Also

Chapter 12, "Defining Work Centers," page 193

Copying Tasks

This section discusses how to copy tasks and associated attributes.

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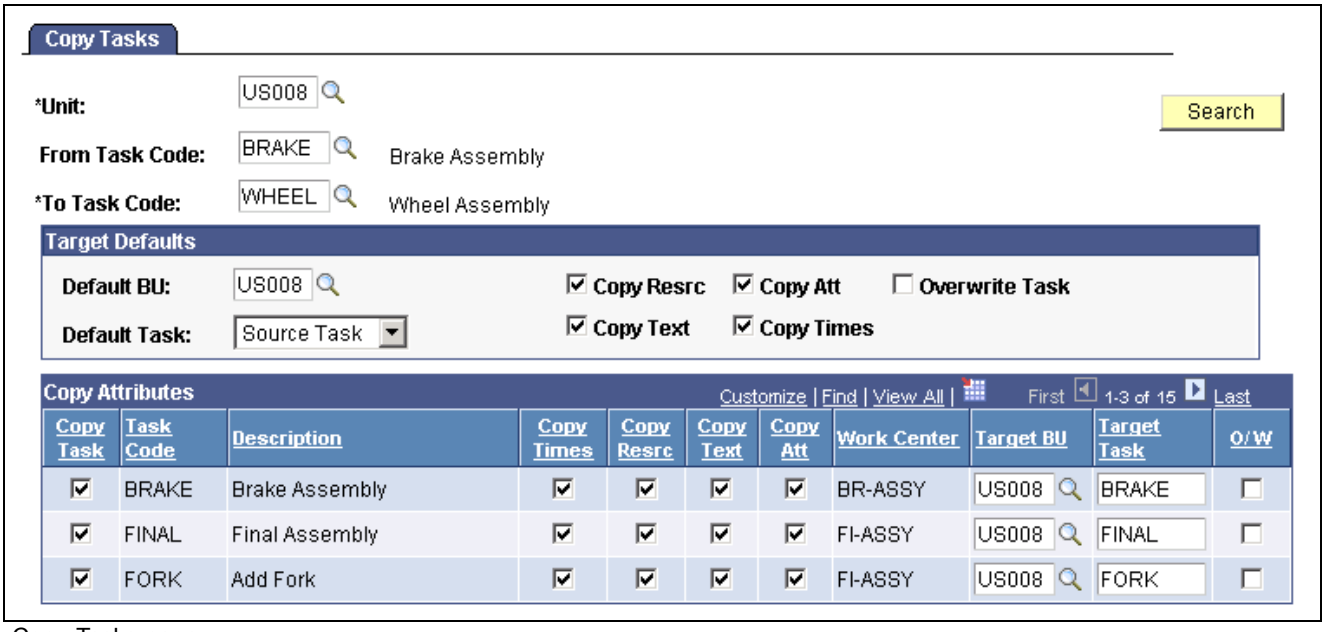
Page Used to Copy Tasks

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 page

You can copy a single task or a range of tasks. After you enter the source information, click the Search button to display the task information.

Unit Select the business unit from which the tasks are 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:

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- *Source Task:* The system displays the source task codes in the Target Task field in the lower-right part of the page.
- *Leave Blank:* 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 recourses), 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 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 business unit. If the target task already exists in the target business unit and you select the O/W 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.

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CHAPTER 14

Structuring Routings

This chapter provides an overview of routings and discusses how to:

- Maintain routings.
- Define and view master routings.
- Copy routings.
- Delete routings.
- View manufacturing routing comparisons.

Understanding Routings

You can create and maintain routings by using PeopleSoft Manufacturing. Creating a routing includes 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 581

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Understanding Yield by Operation in PeopleSoft Manufacturing

In many manufacturing processes, some parent items (such as subassemblies, primary items, or final assemblies) are lost during manufacturing. This loss manifests itself as assembly scrap, which can result from breakage, poor quality, or nonconformance to specifications. Operation yield enables 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 is still met once the manufacturing process has been completed. 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.

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 calculates the other quantity automatically.

Determining Order Quantities Using PeopleSoft Supply Planning

When you use yield by operation and you want to ensure that the demand quantity is met, use an inflated production quantity. This enables 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 by 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 percent yield (or accept the default values) at all operation sequences.

See Also

Chapter 18, "Maintaining Production Orders and Production Schedules," page 311

Chapter 14, "Structuring Routings," Defining Routing Operations, page 226

Prerequisites

Before creating and maintaining routings you must, *at a minimum:*

- Define work centers where jobs or tasks are performed.
- Define conversion codes, if you want to calculate conversion costs.
- Define conversion rates (such as 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 resources.

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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. Define count points.

   Count points are an automated way to predefine when 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 is only consumed—and labor and overhead are only earned—from the previous count point.

Note. Count points can be used only on production IDs.

See Also

Chapter 12, "Defining Work Centers," page 193

PeopleSoft Enterprise Cost Management 9.0 PeopleBook, "Defining the Cost Foundation for Makeable Items"

Chapter 23, "Completing Operations and Recording Scrap," Recording End Item Completions Using Count Points, page 474

Common Elements Used in This Chapter

Routing Type

Select the type of routing. Options are:

- *Production*: This is 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 they 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 is applied to determine order quantities,

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Op Seq (operation sequence) Enter a value to sequence operations on a routing. It is advisable to increment operation sequence numbers by a set amount—for example, *5* or *10*—in case you need to add operations at a later date.

Maintaining Routings

To create and maintain routings, use the Routing Definition (EN_ROUTING) component.

To define file locaitons, use the File Locations (FILE_LOC) component.

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.

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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	View the routing information for manufacturing or engineering routings.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Document Management Options

PeopleSoft Enterprise Engineering 9.0 PeopleBook, "Managing Documents"

PeopleSoft Enterprise Engineering 9.0 PeopleBook, "PeopleSoft Engineering Reports," ENS1001 - Routing Report

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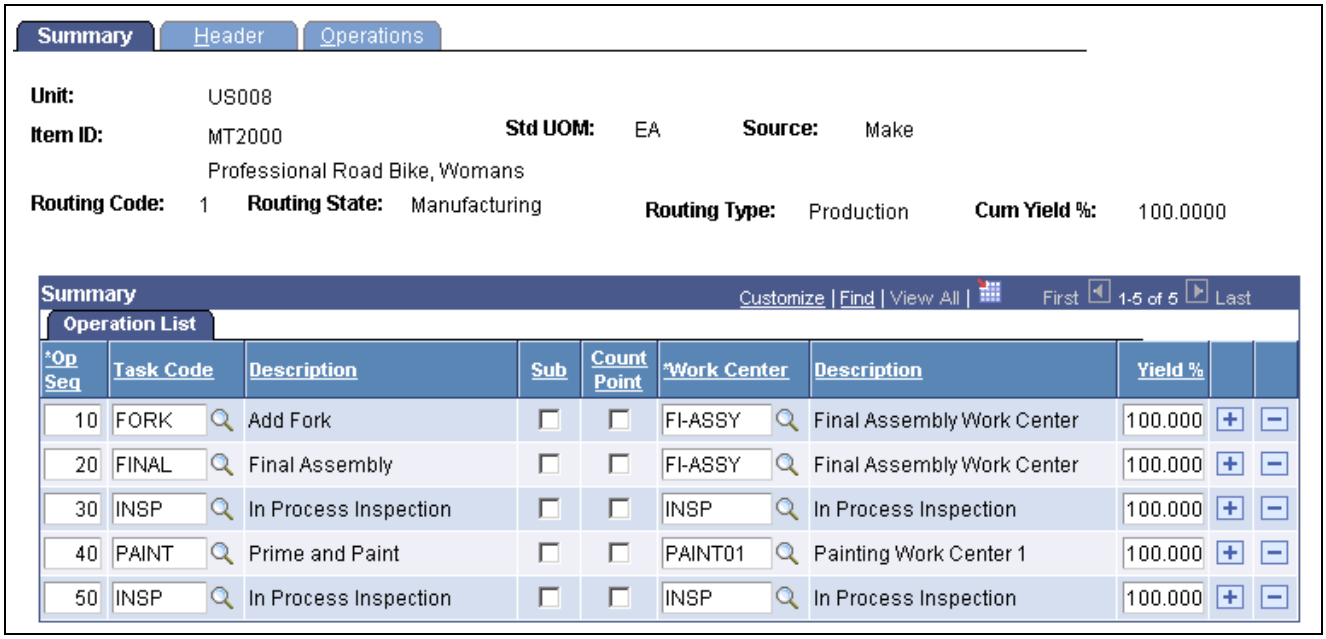
Defining Routing Operations

Access the Define Routings - Summary page.



Define Routings - Summary page

The operation sequences defined here correspond to the operation sequences that you specify 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— 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.

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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 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 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 page, the Define Routings page, and the Operation List Maintenance page.

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.

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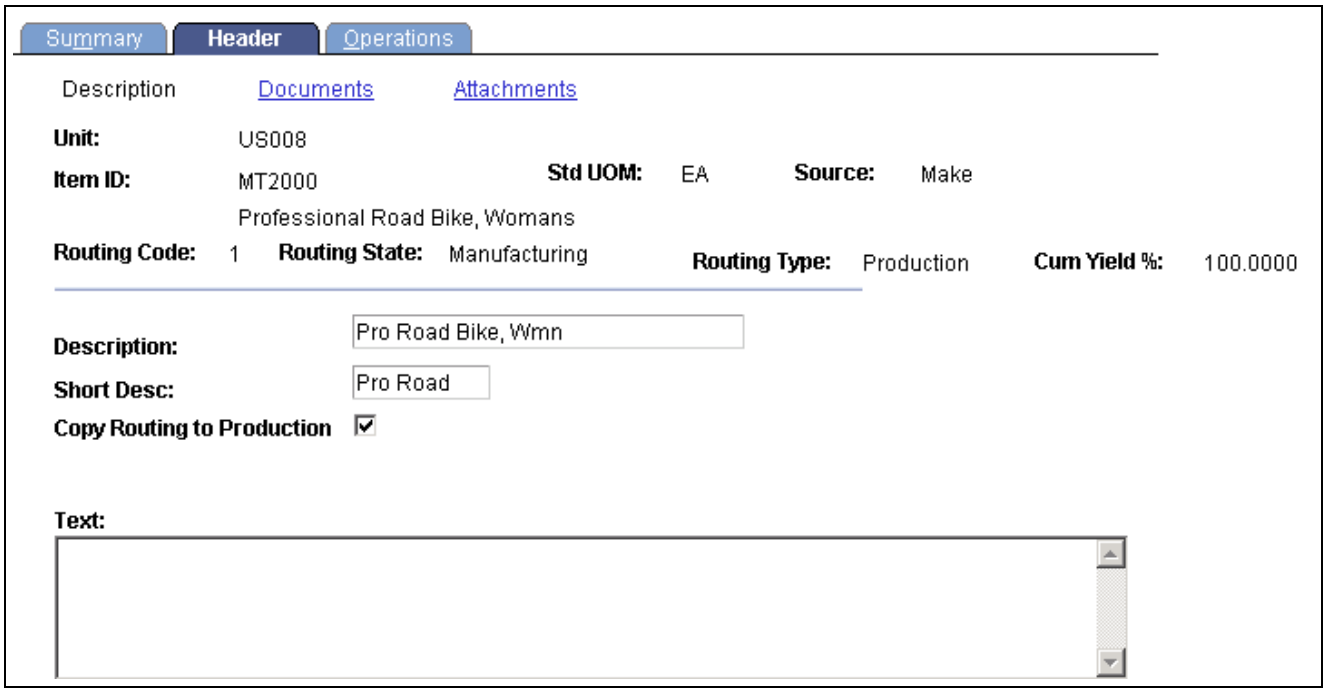

Define Routings - Header: Description page

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 attribute 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.

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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 of specified operations.

If you do no copy the routing to production, the system still uses the routing to calculate costs and calculate planning start or 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)

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. Click this button to display 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 Enterprise Engineering 9.0 PeopleBook, "Structuring Engineering Routings," Defining Master Routings

Chapter 8, "Maintaining Bills of Material," Defining and Maintaining Revisions, page 97

Specifying Routing Header Attachments

Access the Define Routings - Header: Attachments page.

File Ext (file extension)

Select the type of media to attach.

Note. You must set up file extensions in advance on the File Locations page.

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Document ID Enter the file name.

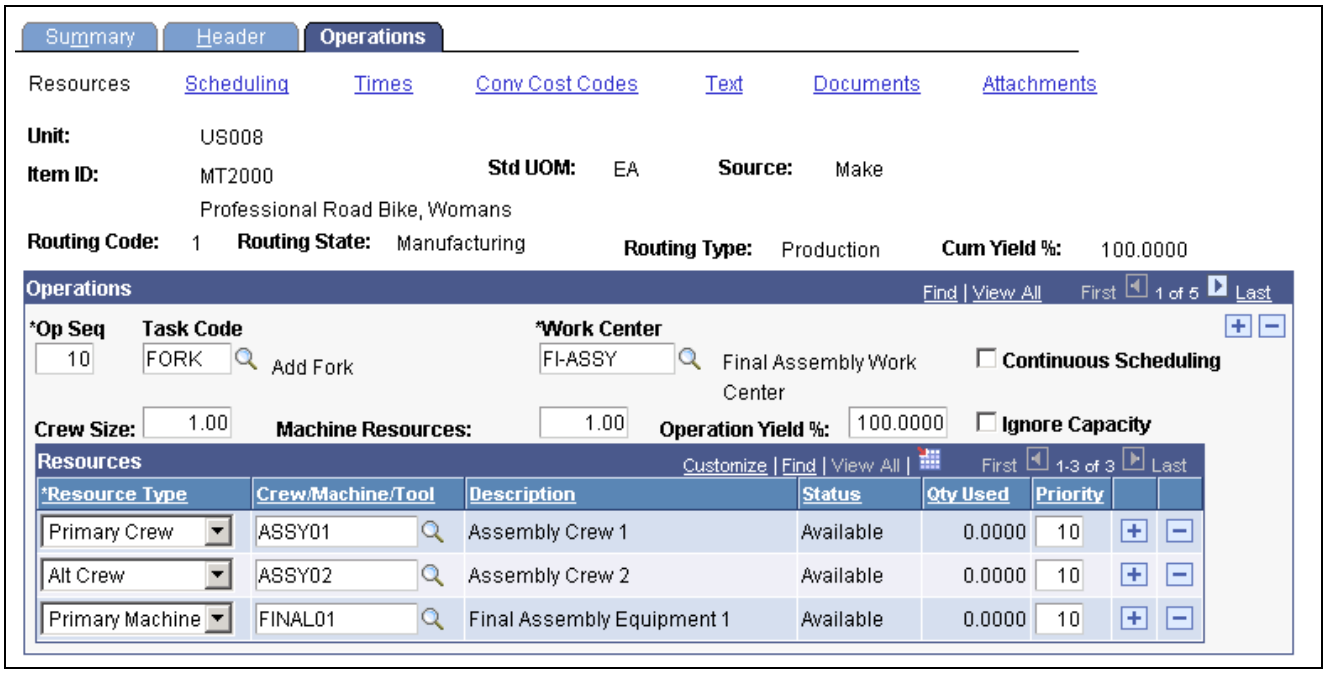
Click the Attachments button to launch the multimedia object attached to the routing header.

See Also

PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook, "Defining Procurement Options," Defining File Locations

Defining Routing Resources

Access the Define Routings - Operations: Resources page.



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 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.

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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 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:

- *Primary Crew*
- *Primary Machine*
- *Primary Tool*
- *Alternate Crew*
- *Alternate Machine*
- *Alternate Tool*

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 that have a Pending status with a production routing.

Setting Routing Schedule Options

Access the Define Routings - Operations: Scheduling page.

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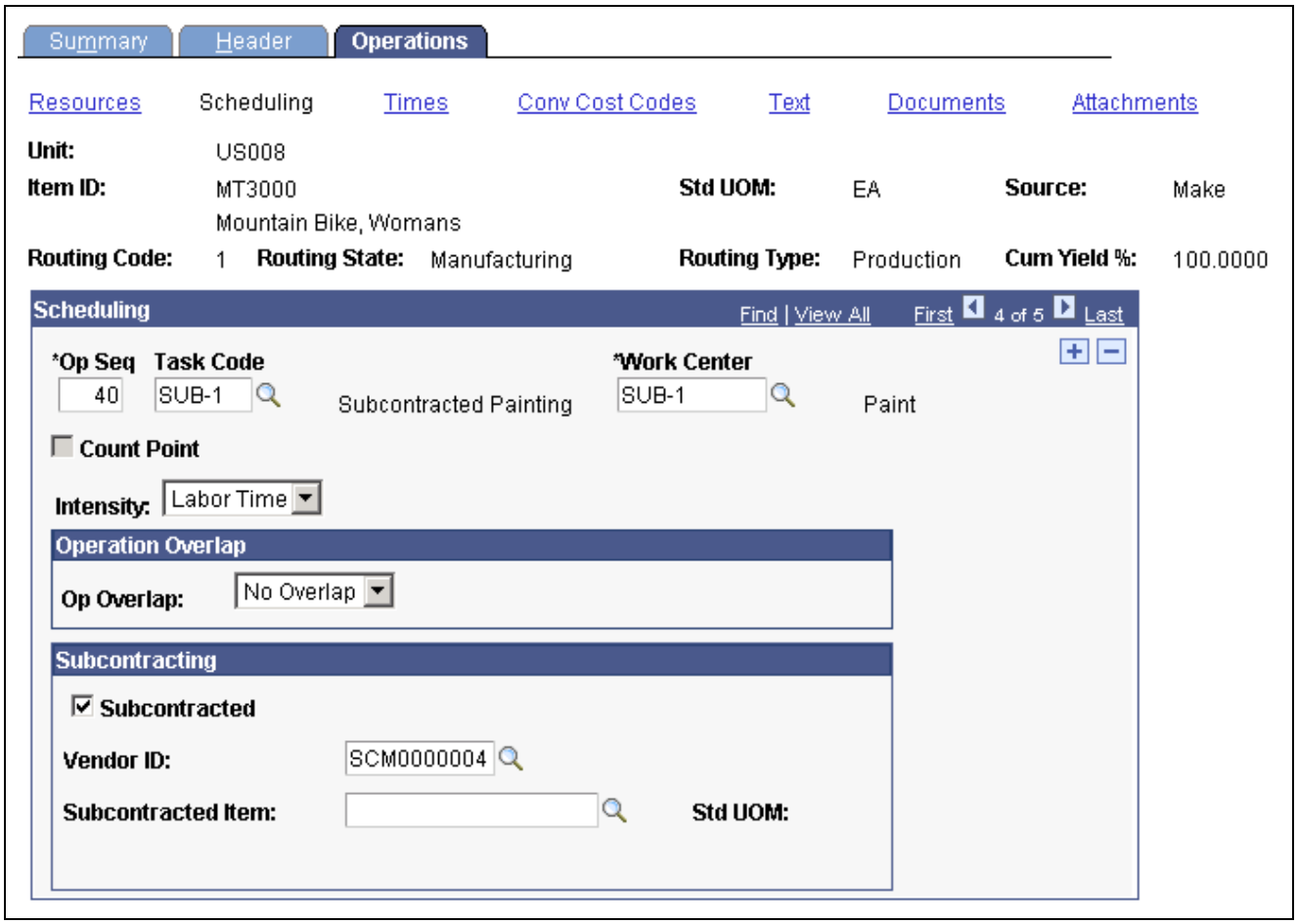

Define Routings - Operations: Scheduling page

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.

Subcontracted — This option is selected if the operation is being performed by a vendor. You cannot clear this check box if purchase orders have been created for this outside vendor.

Vendor ID — If the subcontracted vendor was defined at the task level, then the name of the vendor appears in this field. Otherwise, you can select the appropriate vendor for this subcontracted operation.

Subcontracted Item — If this value was defined at the routing level, then the item appears in this field. You can change the value in this field.

The subcontracted item will be used on any subcontracted purchase orders that are created for this operation.

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.

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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 the scheduling. Base the start and end date of the operation on labor time, machine time, or both. Options are:

- *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 before the completion of the preceding operation. 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.

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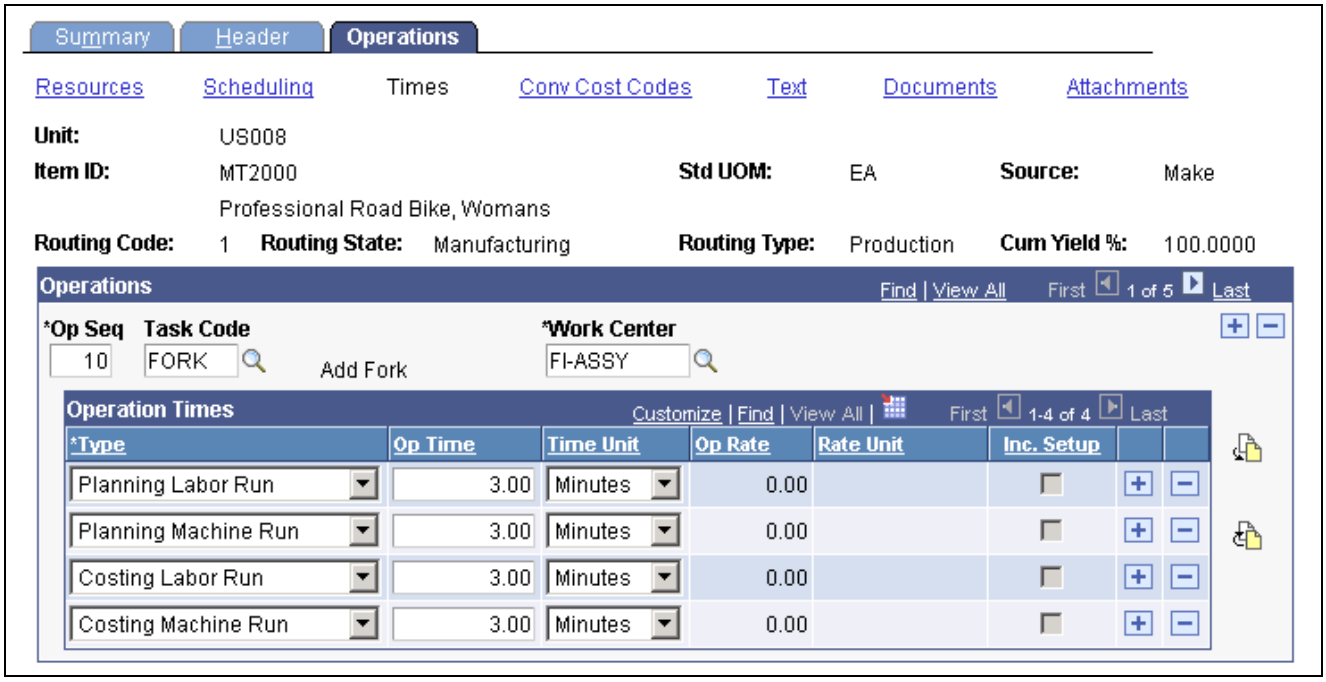
Important! If an operation has a fixed run rate assigned to it, the preceding operation cannot have a send-ahead quantity because fixed run operations require that the entire quantity is available at the beginning of the run. For example, operation 1 cannot have a send-ahead quantity assigned if operation 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 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.



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.

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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 the 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.

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 has the following options *Days, Hours,* and *Minutes*. 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 *Units/Day, Units/Hour,* or *Units/Minute.* For example, if you enter *3* in the Op Rate field and *Units/Day* in the Rate Unit field, three units are completed every day for the operation.

Inc Setup (include setup) Select to include setup in the operation lead time calculation. You can only select this check box for *Planning Labor Setup* and *Planning Machine Setup* operation types.

If you do not select include setup, setup can begin before any production units arrive at the work center. Setup can occur at any time after the start of production, and the system does not include it as part of the item's lead time, except at the first operation. If you include setup, the setup time is factored into the task or operation's lead time. The system always uses setup in the lead time calculation of the first operation, if setup is specified, regardless of the check box setting.

Click the 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.

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Click the 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—this is, for every batch of 1000, you anticipate receiving 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.
- In-transit.
- 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 five 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 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.

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 post-production time as a requirement on the work center or the work centers resources.
- PeopleSoft Supply Planning uses queue and in-transit times, if they are specified for the task.

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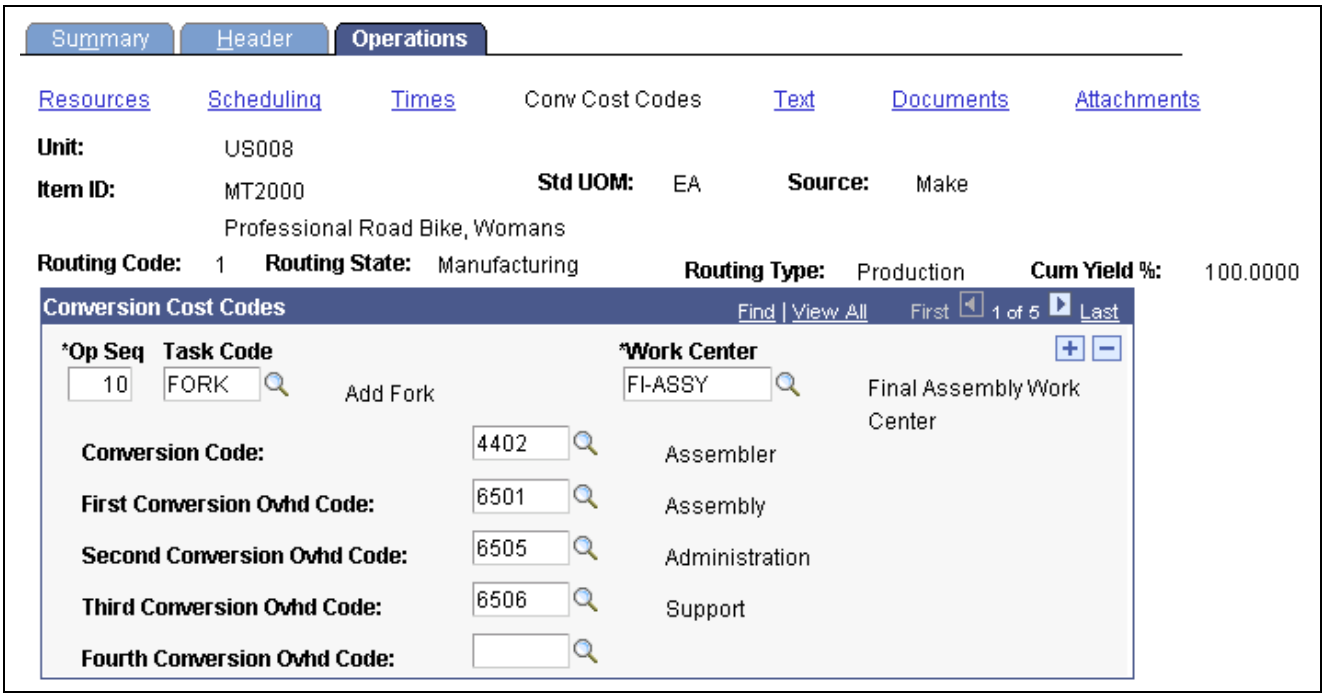
- If you have indicated that setup is not included for scheduling purposes (that is, setup can begin at any time after the start of production), the system does not use it for capacity planning purposes.

See Also

Chapter 13, "Maintaining Tasks," page 209

Associating Conversion Cost Codes With an Operation

Access the Define Routings - Operations: Conv Cost Codes page.



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 page and the Conversion Overhead Code page for the task or work center.

Note. Changing conversion codes creates variances until the item cost is recalculated and updated.

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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 the 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 Enterprise Source to Settle Common Information 9.0 PeopleBook, "Defining Procurement Options," Defining File Locations

Defining and Viewing Master Routings

To assign an item family routing, use the Item Family Routing Assignment (EN_RTG_FAMILY) component. To assign a routing to a specific group of items, use the Item Group Routing Assignment (EN_RTG_GROUP) component.

This section provides an overview of master routings and discusses how to:

- Define master routings.
- View manufacturing master routings where-used information.

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Understanding Master Routings

You can define master or reference routings in PeopleSoft Inventory on the Manufacturing page within the Define Business Unit Item component. 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 creating this link, you need to define an item group and assign that item group to a reference routing item in 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 creating this link, you need to define an item family and assign that item family to a reference routing item in 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, in PeopleSoft Manufacturing, the reference or master routing is displayed everywhere that 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 are affected by the master routing item changes.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Item Control Values"

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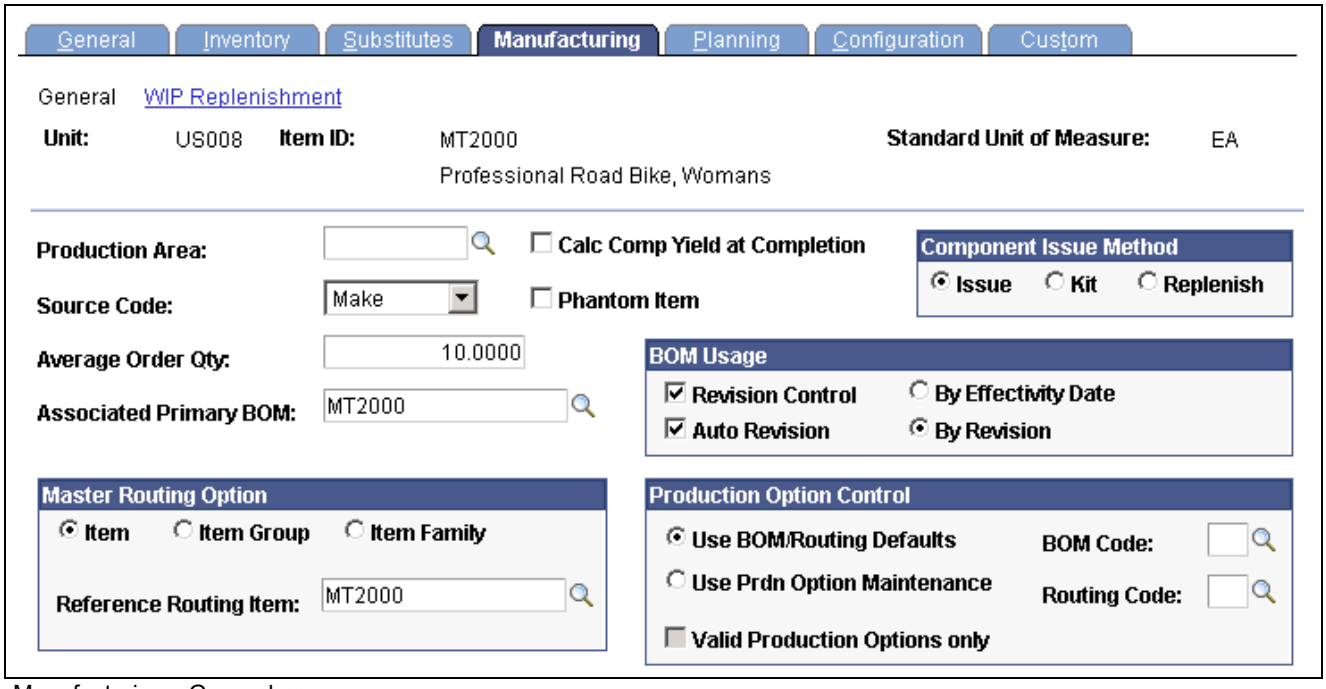
Pages Used to Define and View Master Routings

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	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 Manufacturing: General page.



Manufacturing - General page

Master Routing Option

Item Select to link an item directly to the routing of the item that you select in the Reference Routing Item field. The default is the item itself.

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Item Group Select 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.

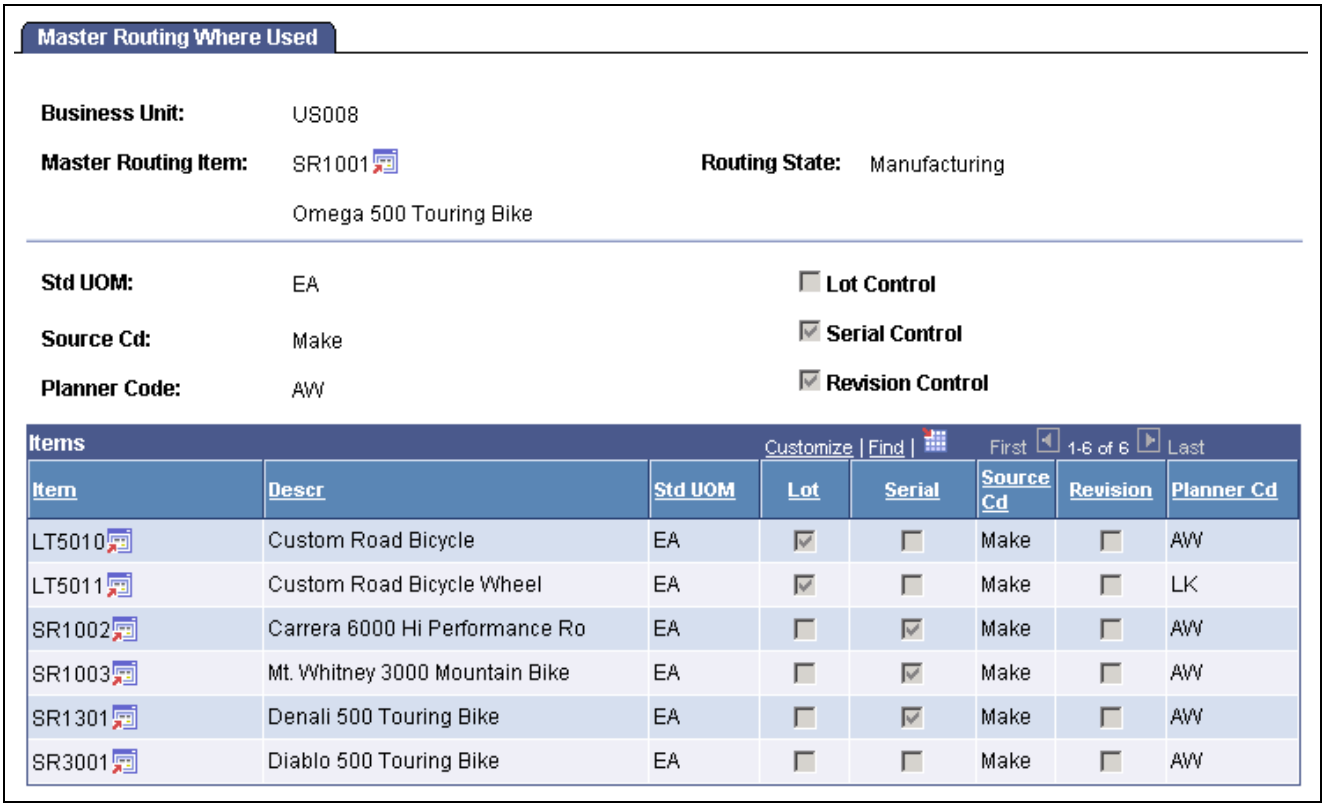
Item Family Select this option to link the routings of a reference routing item to an item family. To use this option, you must first define item group routings on the Family Rtg Assignment page.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Item Control Values"

Viewing Manufacturing Master Routings Where-Used Information

Access the Master Routing Where Used page.



Master Routing Where Used 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 specified item.

See Also

PeopleSoft Enterprise Engineering 9.0 PeopleBook, "PeopleSoft Engineering Reports," ENS1003 - Master Routing Where Used Report

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Copying Routings

This section discusses how to:

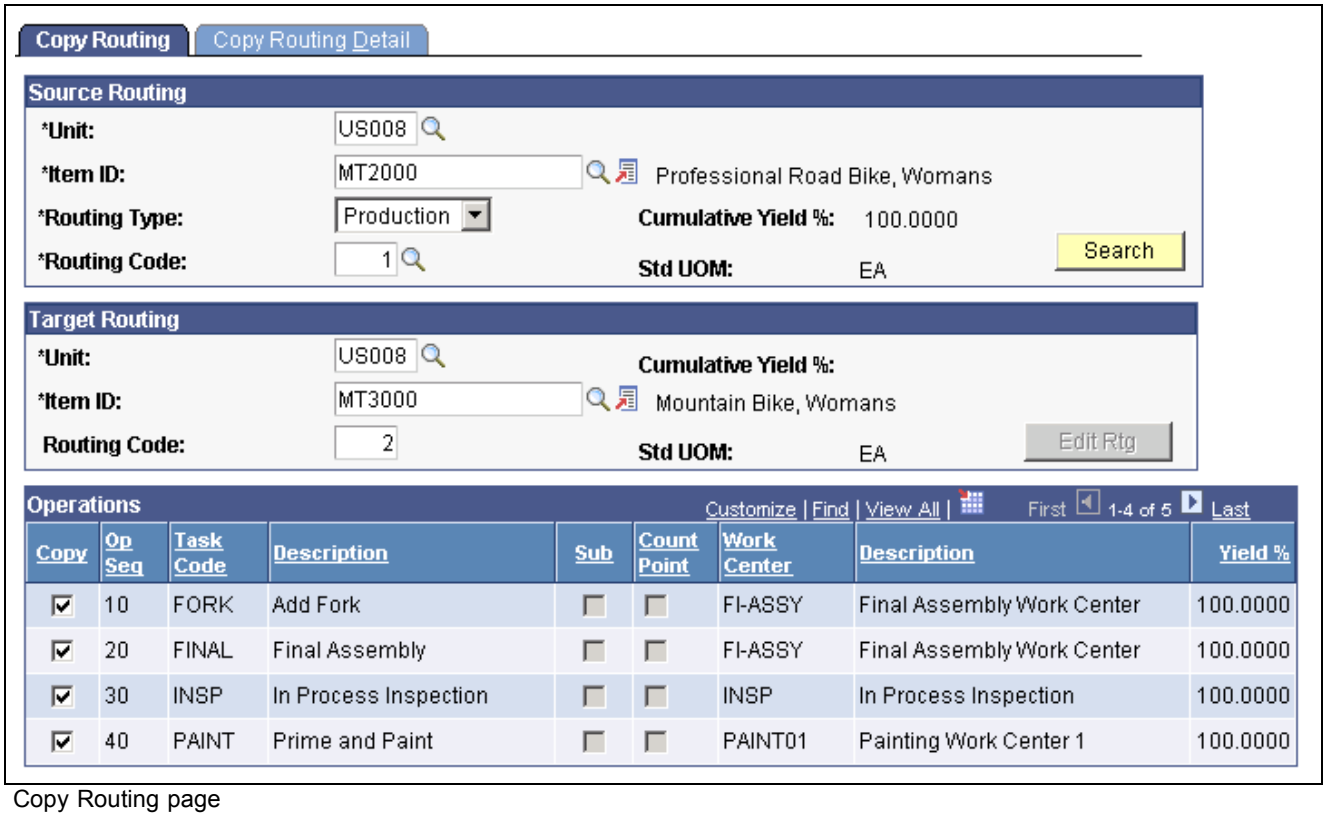
- Copy routings.
- Copy routing details.

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 to be copied.

Copying Routings

Access the Copy Routing page.



Copy Routing page

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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.

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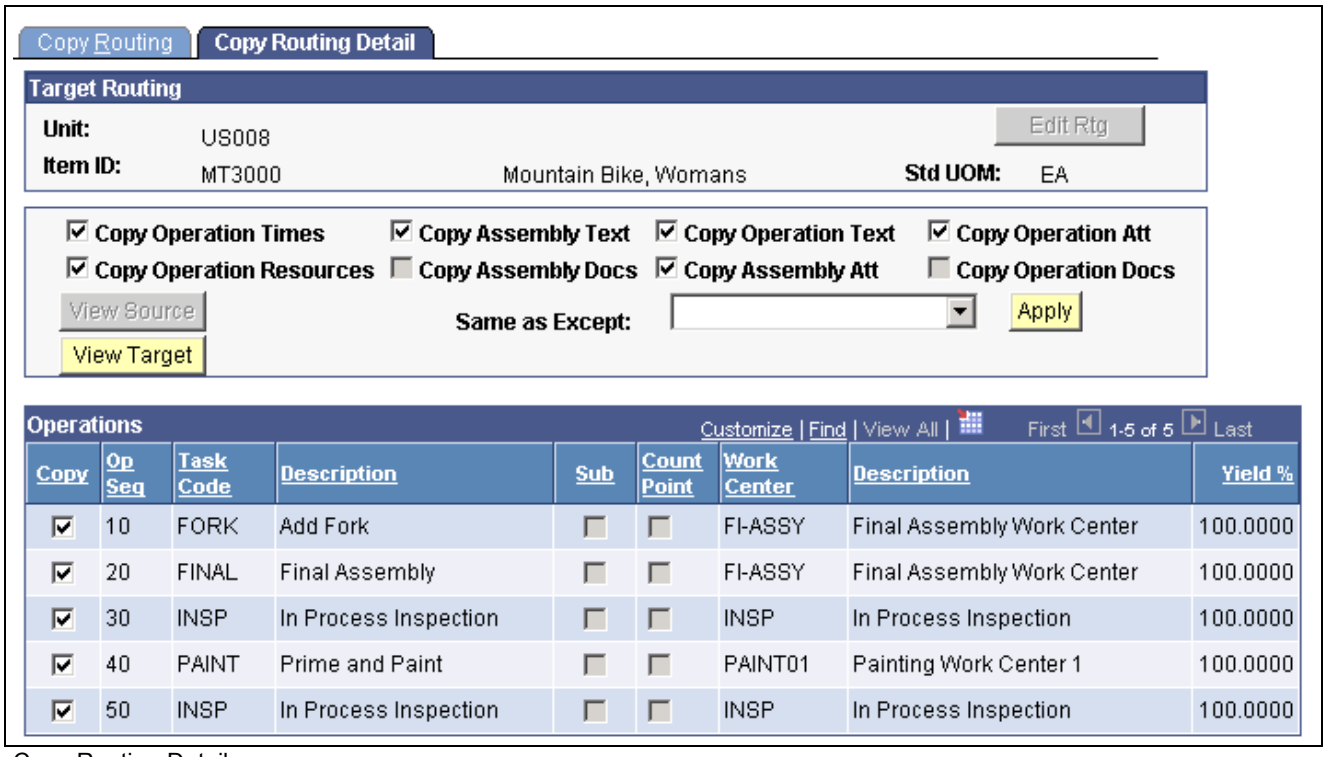

Copy Routing Detail page

You can copy the associated routing operation times, resources, text, attachments, and documents, as well as assembly text, attachments, and documents. If you do not want to copy routing attributes, clear the attributes by clearing 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:

- *Exclude All*: 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.

- *Exclude Op Seq Range*: 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.

- *Include All*: 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.

- *Include Op Seq Range*: 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.

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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 view the source item's routing and the operations selected to copy.
View Target	Click to preview how the target item's routing will look 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 can access the Routing Maintenance component to make changes to the copied routing.
Edit Routing	Click to edit the source item's routings with the Define Routings - Summary page.

PeopleSoft Engineering and Transferring Routings

If you have PeopleSoft Engineering installed, you can also transfer multiple routings at the same time from Engineering to Manufacturing or from Manufacturing to Engineering.

See Also

PeopleSoft Enterprise Engineering 9.0 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.

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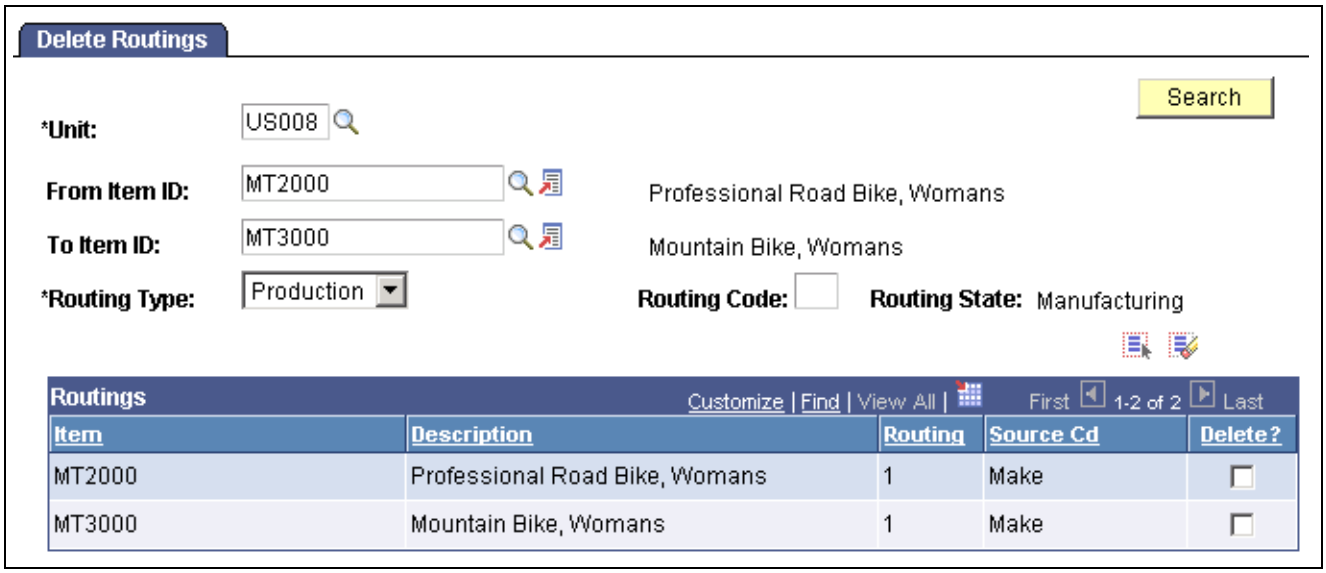

Delete Routings page

Routing Type, Routing Code, From Item ID, and **To Item ID** Select the values, 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. Also you cannot delete a routing code if firm or released production IDs or production schedules exist.

Viewing Manufacturing Routing Comparisons

This section lists common elements and discusses how to:

- Compare manufacturing routings.
- Compare manufacturing routing header detail differences.
- Compare operational detail differences.
- Compare operation resource differences.
- Compare operation time differences.

Common Elements Used in This Section

Differences Displays the differences between two routings. Possible values are:

- *Added:* Indicates an element has been added to the target routing (RTG2) that does not appear on the baseline routing (RTG1).

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- *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.
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 Comparison - Operations: Times	EG_RTG_TIME_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparison, Operations, Times	Display operation time differences.

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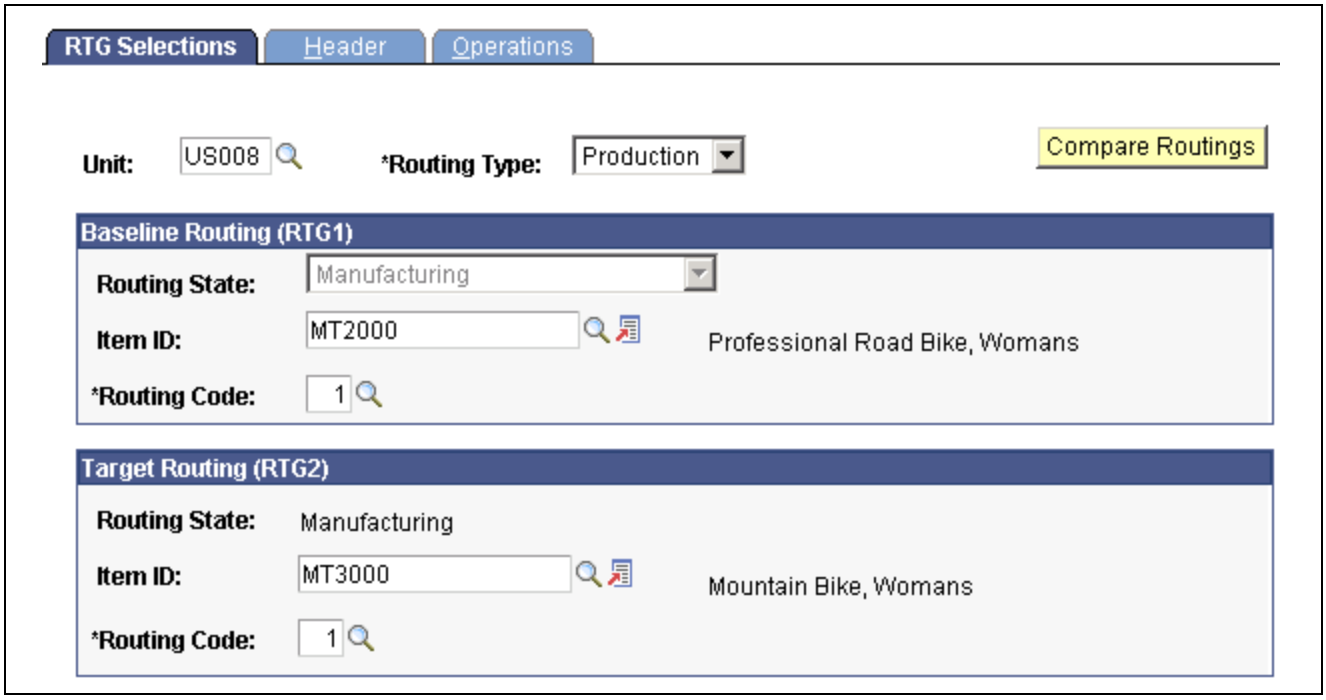
Page Name	Object Name	Navigation	Usage
Routing Comparison - Operations: Documents	EG_RTG_OPDC_CMP	Manufacturing Definitions, Resources and Routings, Routings, Routing Comparisons, Operations, Documents	Display the routing document differences. **Note.** You must have PeopleSoft Engineering installed 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 Enterprise Engineering 9.0 PeopleBook, "PeopleSoft Engineering Reports," ENS1002 - Compare Routings Report

Comparing Manufacturing Routings

Access the Routing Comparison - RTG Selections page.



Routing Comparison - RTG Selections page

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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)

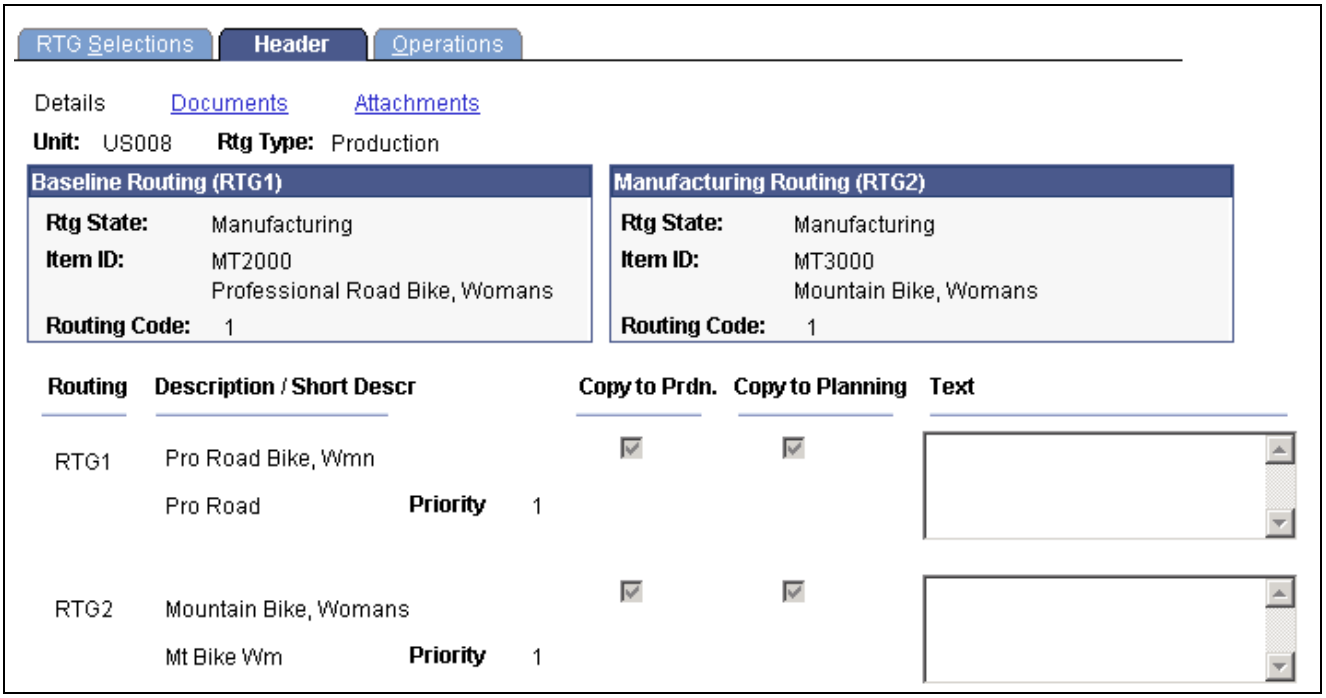
Item ID Select the item ID of the target routing to use for the comparison.

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.



Routing Comparisons - Header: Details 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 227

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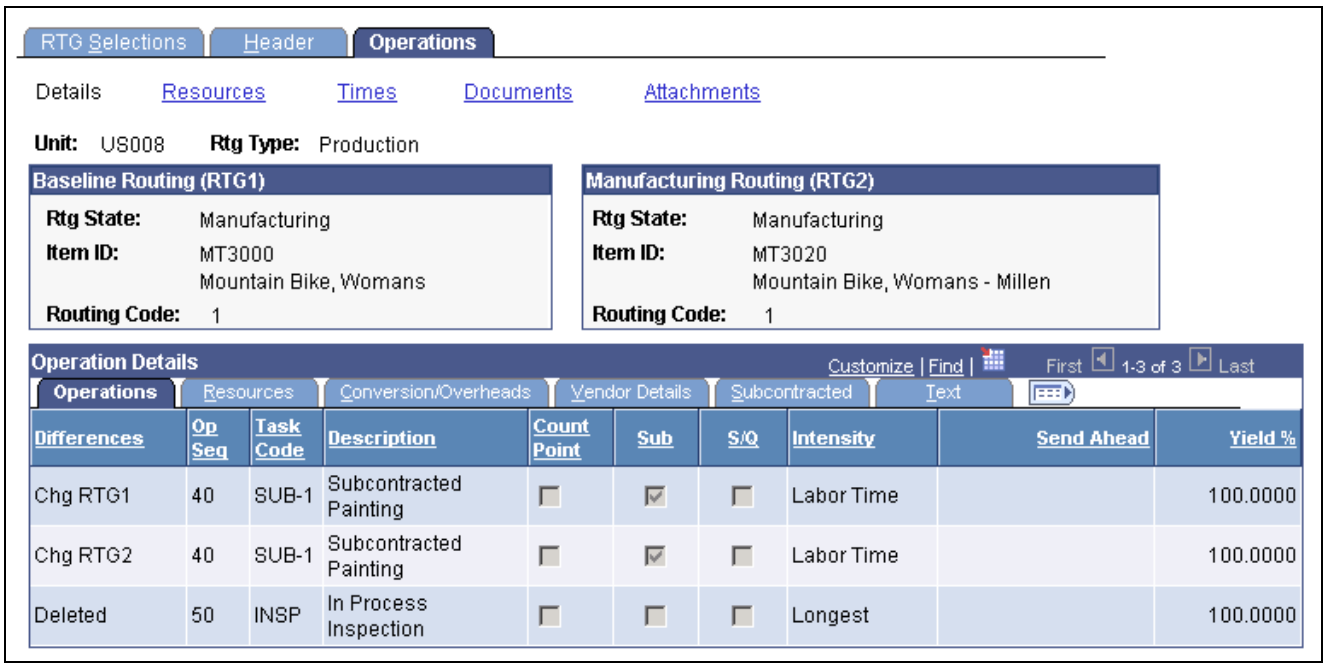
Comparing Operation Detail Differences

Access the Routing Comparison - Operations: Details page.



Routing Comparisons - Operations: Details page

This page displays the differences in the operation sequence and other related operation detail information.

Operations tab

This page displays the differences including information such as task codes, count points, subcontracting status, setup and queue, intensity, operation yield percentages, and send-ahead quantities.

Resources tab

This page displays resource differences in work centers, crew size, and machines.

Conversion/Overheads tab

This page displays conversion and overhead differences, including information such as conversion codes and overhead conversion codes associated with the operations.

Vendor Details and Subcontracted tabs

These pages display vendor details and subcontracted information differences associated with the operations.

Comparing Operation Resource Differences

Access the Routing Comparison - Operations: Resources page.

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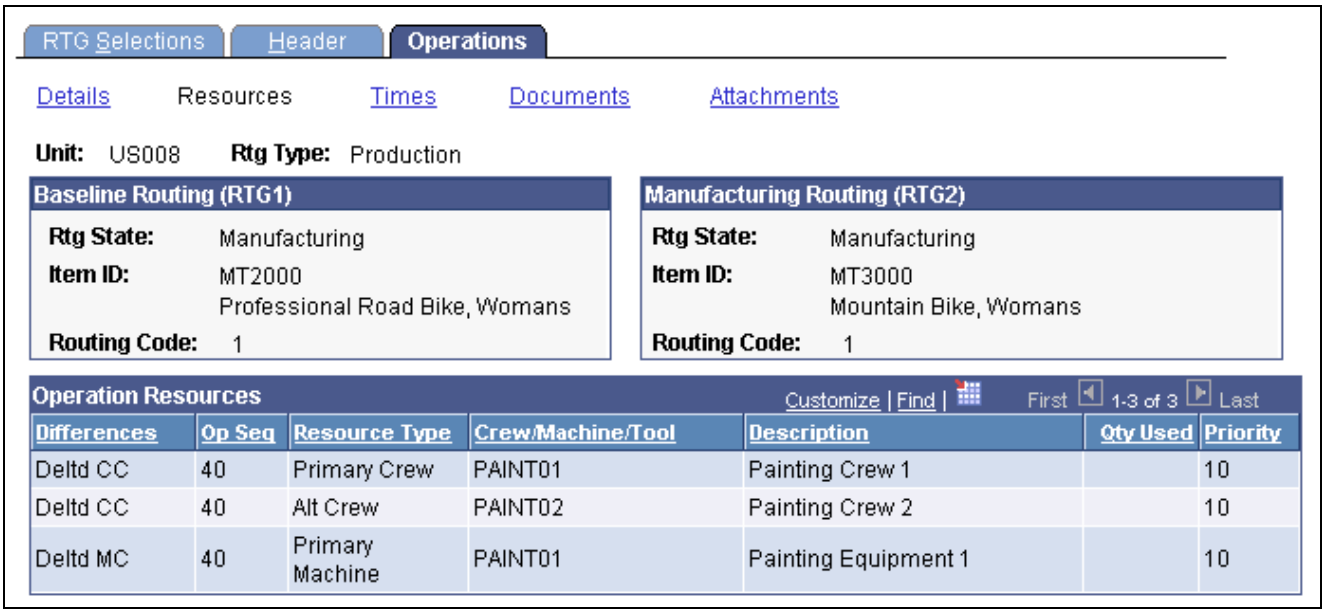


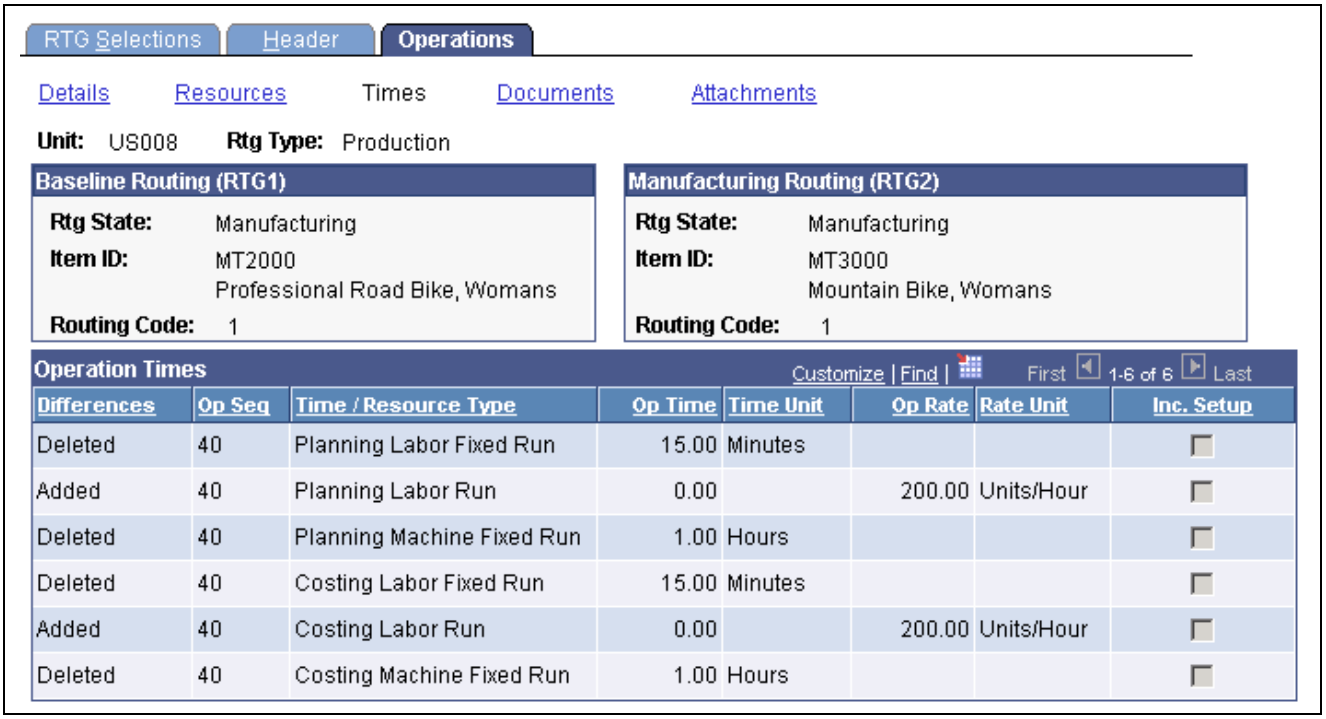
Routing Comparison - Operations: Resources page

The page displays differences in operation sequence, resource types, crews, machines, tools, 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 appears on this page.

Comparing Operation Time Differences

Access the Routing Comparison - Operations: Times page.



Routing Comparison - Operations: Times page

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This page displays differences in operation sequences, time or resource types, operation times, time units, operation rates, and rate units. It also indicates whether the time is included in the setup.

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CHAPTER 15

Defining Production Options

This chapter provides an overview of production options, lists prerequisites, 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 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 the 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 the 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.

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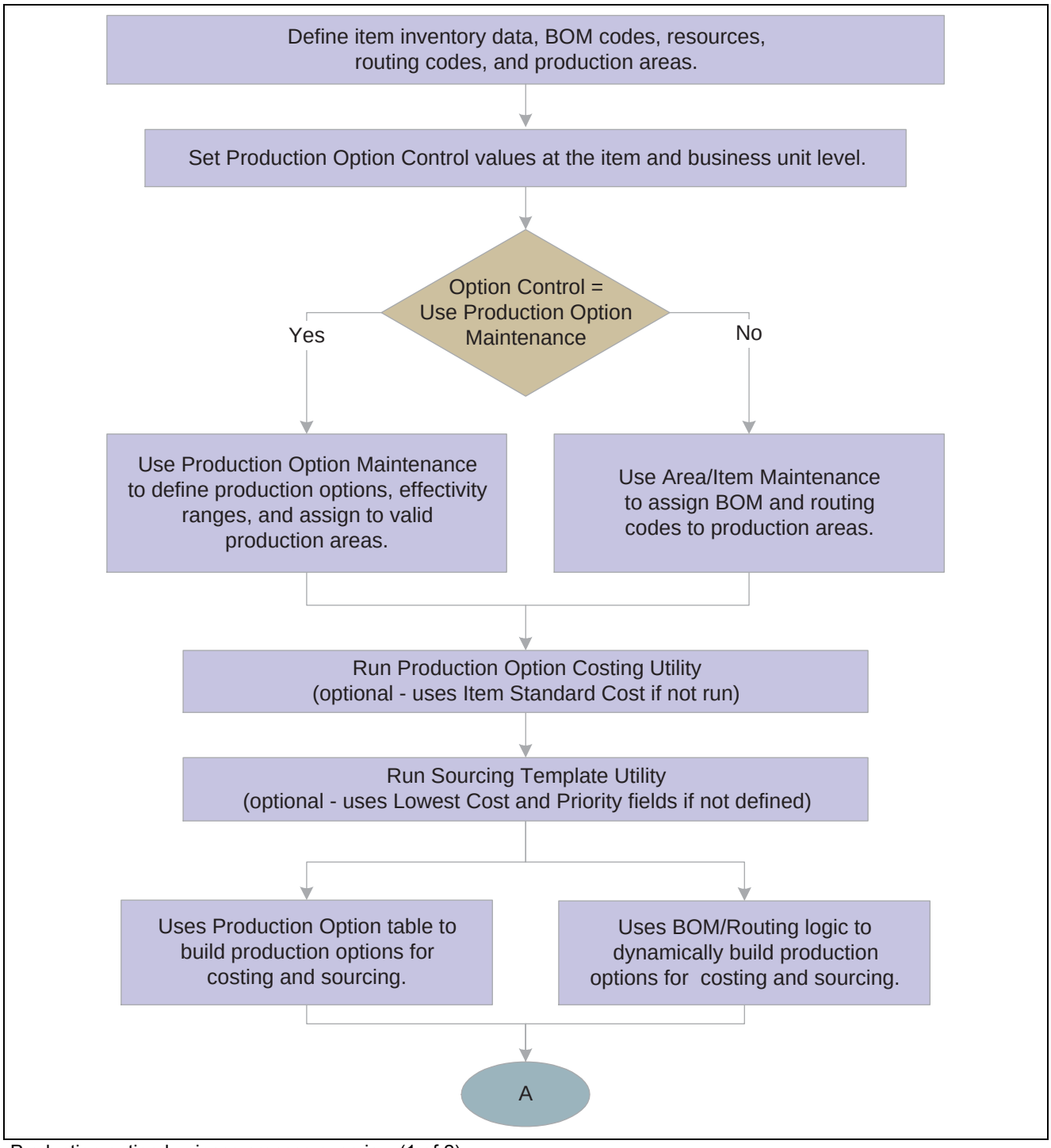
This flowchart provides a top-level view of how you can use production options:



Production option business process overview (1 of 2)

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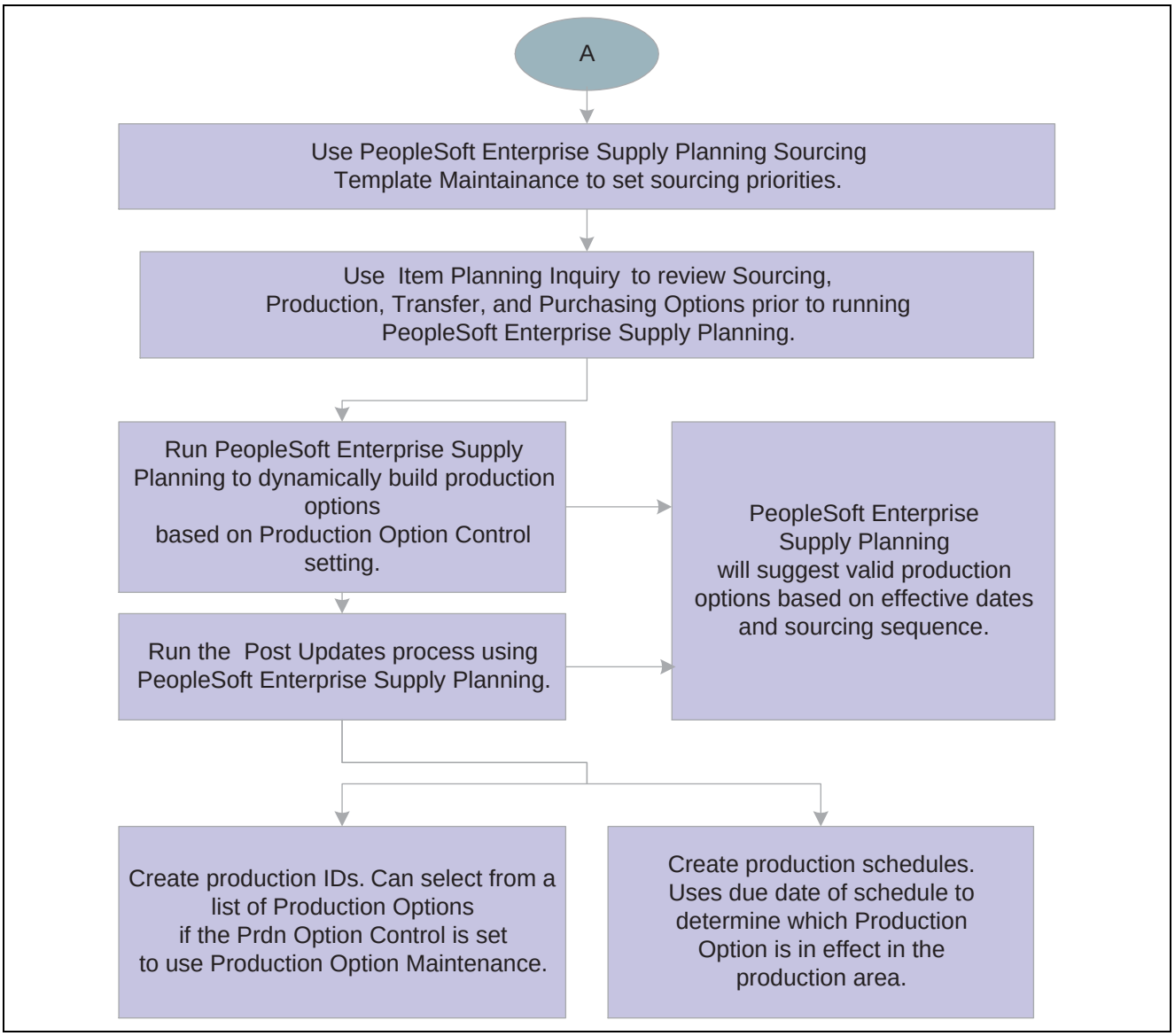

Production option business process overview (2 of 2)

Prerequisites

Before you begin defining and maintaining production options, you must perform several setup 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.

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See Also

Chapter 17, “Setting Up Production Areas,” page 295

Chapter 8, “Maintaining Bills of Material,” page 89

Chapter 14, “Structuring Routings,” page 221

Defining Items that Are to Use Production Options

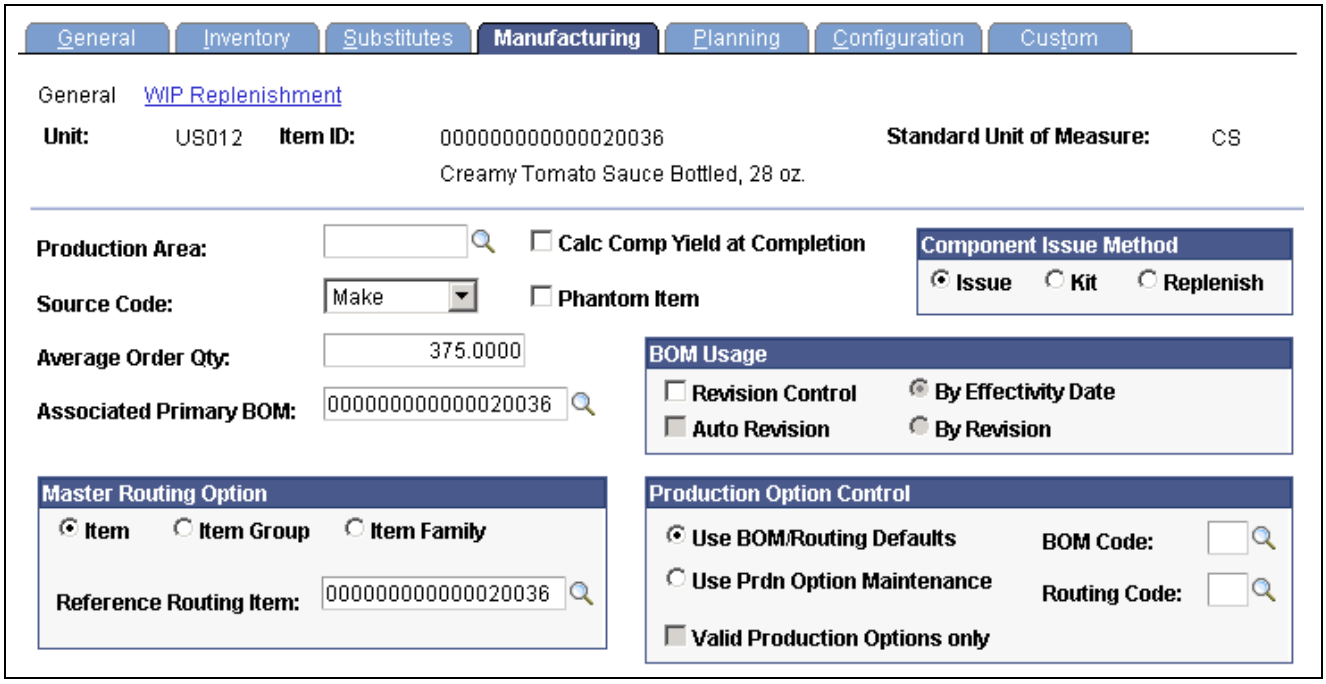
This section discusses how to define items that will use production options.

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.



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.

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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 if 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.
If Routing Codefield 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.

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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.

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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 Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Generation of Item Supply Information

Chapter 14, "Structuring Routings," Defining Routing Header Information, page 227

Chapter 17, "Setting Up Production Areas," page 295

Creating Production Options

To create production options, use the Define Production Options (EN_PDO_MAINT) component.

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.

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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.

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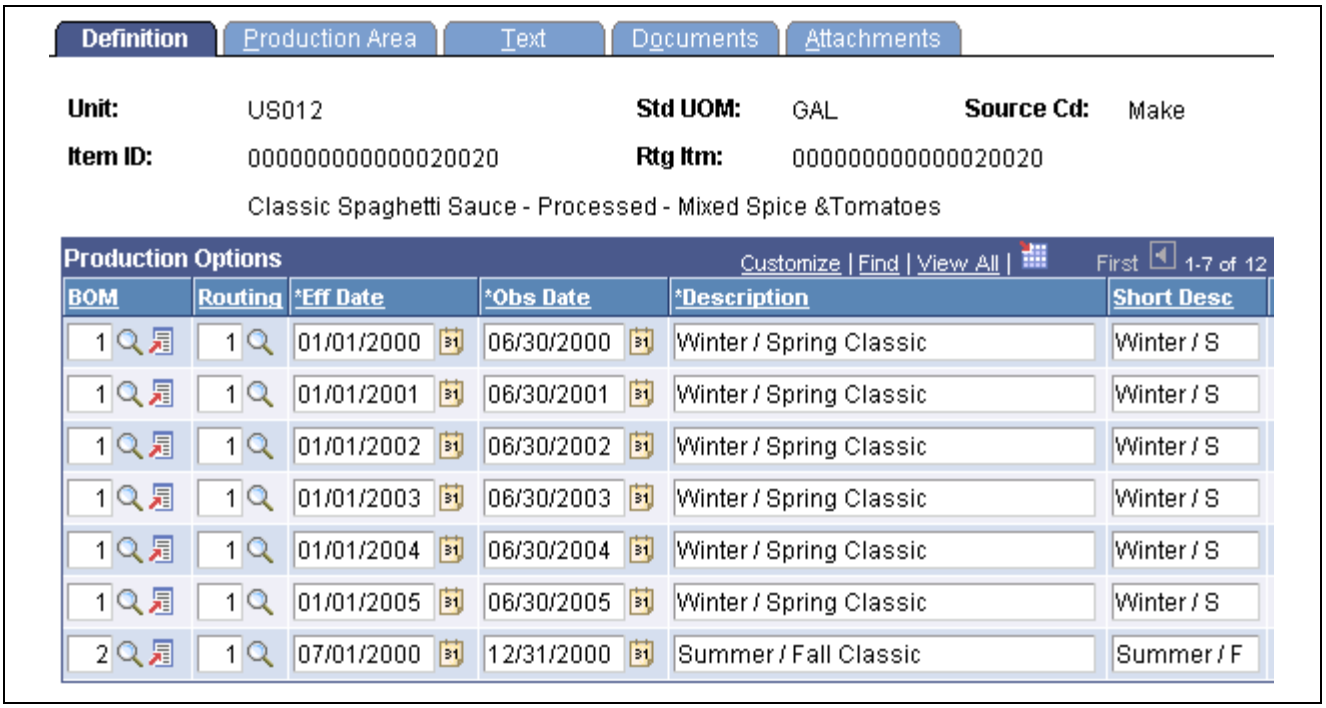

Define Production Options - Definition page

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 Supply 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 89

Chapter 14, “Structuring Routings,” page 221

Chapter 15, “Defining Production Options,” Viewing Component and Output Mix and Production Options, page 266

Associating Production Areas

Access the Define Production Options - Production Area page.

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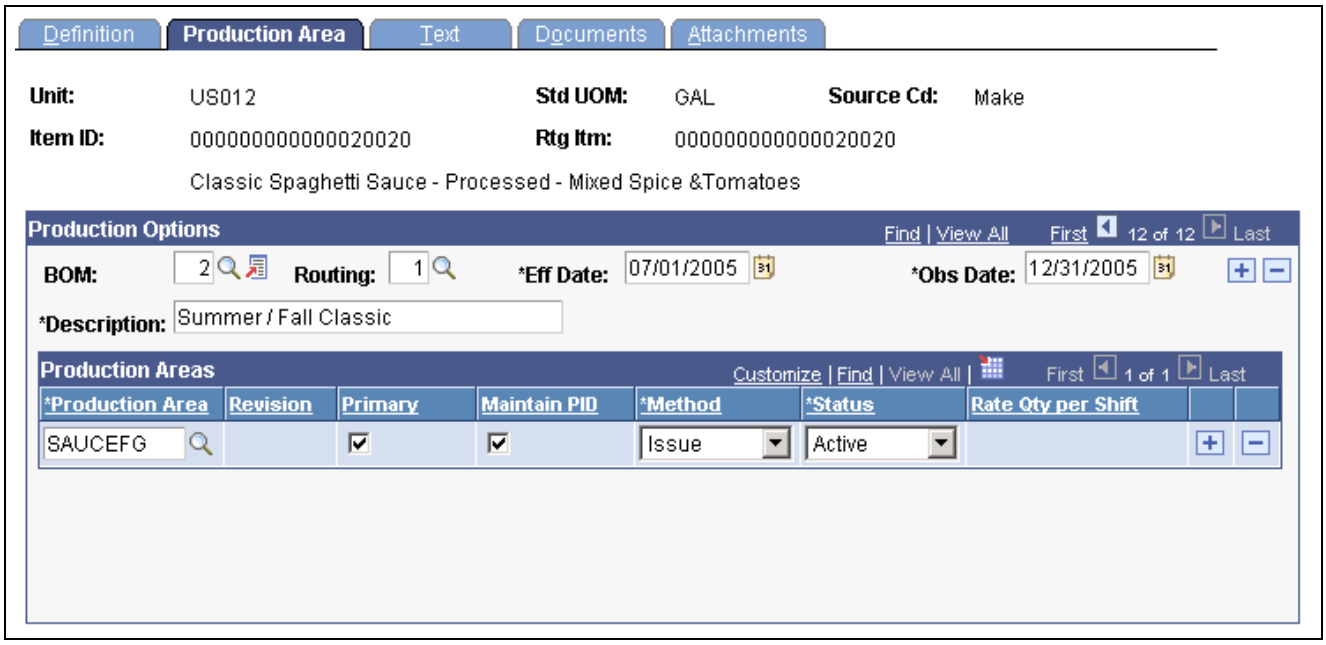

Define Production Options - Production Area page

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 295

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.

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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 Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," 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.

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Common Elements Used in This Section

Click the View Related Links button to access any of these pages:

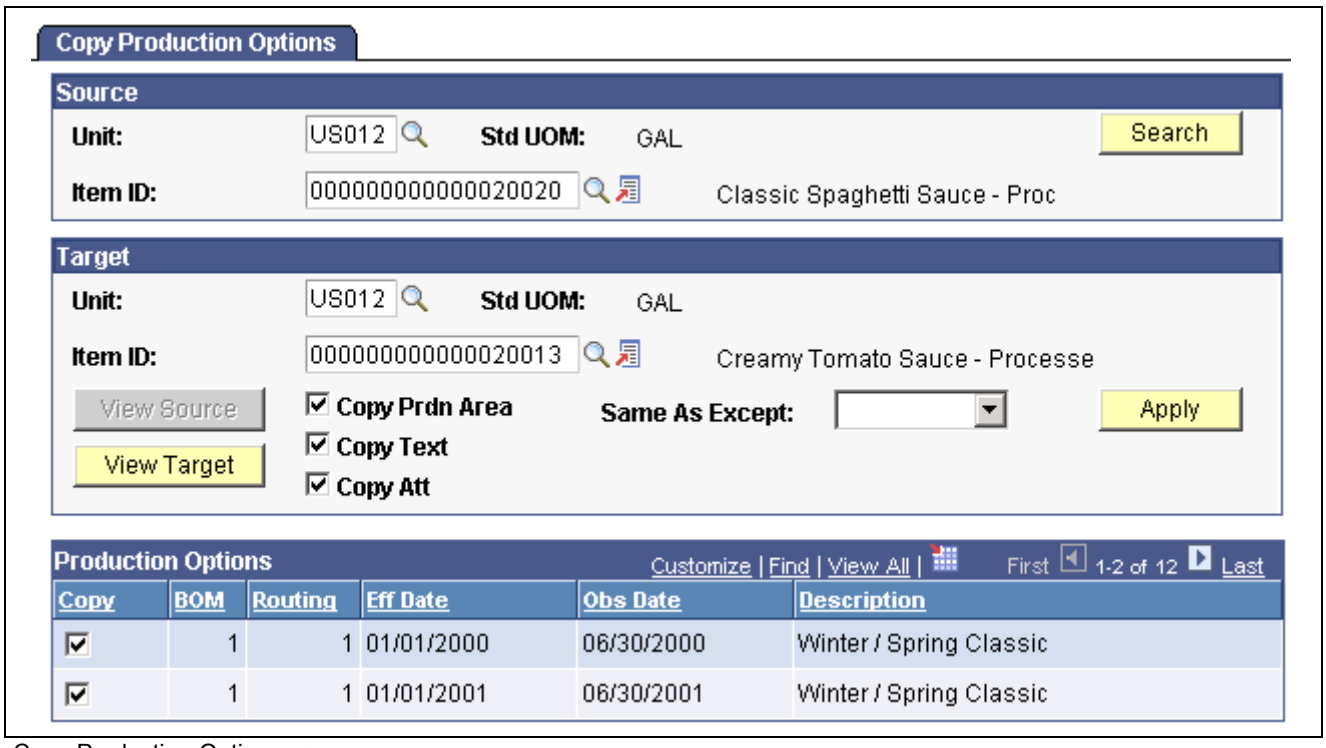
- Item Search: Search for a different item.
- BOM Copy: Copy BOMs from one business unit and item ID combination to another business unit.
- Routing Copy: Copy routings from one business unit and item combination to another business unit.
- Area Maintenance: View or maintain items for a specific production 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 page

Source

Unit and **Item ID** Select the business unit and item ID whose production option you want to copy.

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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:

- *Excld All* (exclude all): Clears all the rows.
- *Incld All* (include all): Selects all the rows.
- *Incld Date* (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 *Excld All* 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 123

Chapter 14, "Structuring Routings," Copying Routings, page 242

Chapter 17, "Setting Up Production Areas," Defining Production Area Summaries, page 302

Chapter 15, "Defining Production Options," Creating Production Options, page 259

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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.
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.

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Page Name	Object Name	Navigation	Usage
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.

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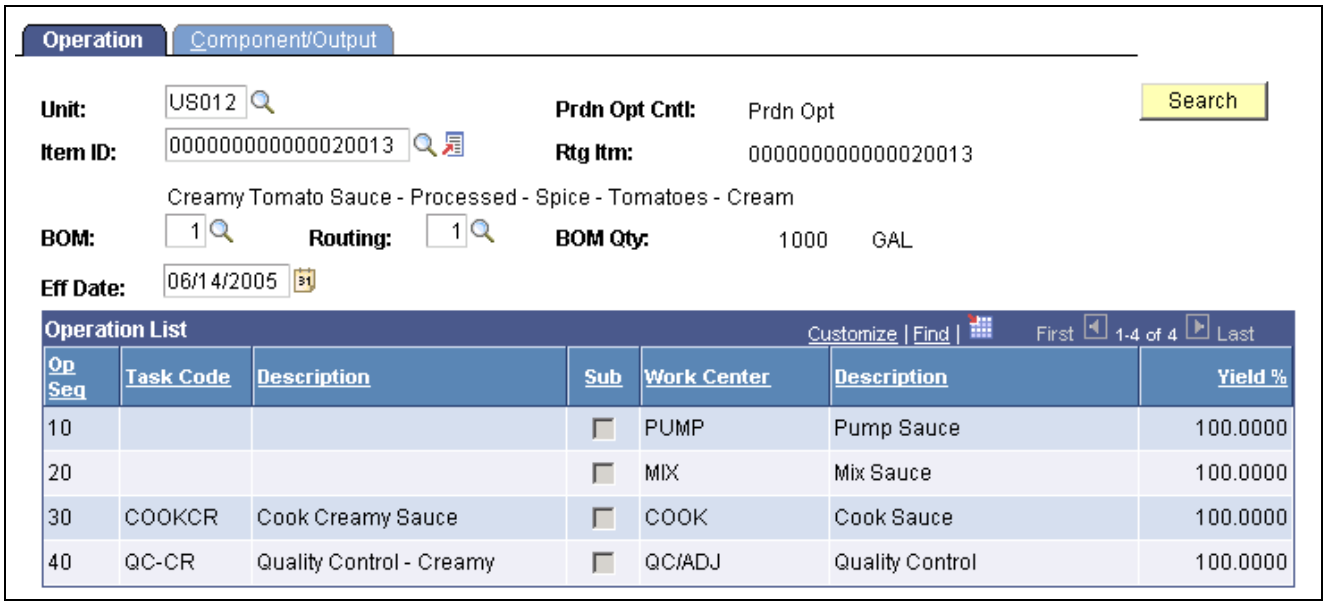

Component/Output Mix - Operation page

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.

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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 302

Chapter 15, "Defining Production Options," Creating Production Options, page 259

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," 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.

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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 Supply Planning production options before 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.

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Since PeopleSoft Supply Planning has visibility into the effective dates defined against the production option, the PeopleSoft Supply Planning application recommends new planned production orders based on the current, effective BOM and routing combinations.

See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Manufacturing Information for an Item

PeopleSoft Supply Planning PeopleBook

Using Production Options with Production

This section discusses how the manufacturing process uses production options.

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 455

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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

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Recording Completions and Scrap Using Electronic Data Collection

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Subcontracting

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Closing Production

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CHAPTER 16

Using Serial Genealogy in PeopleSoft Manufacturing

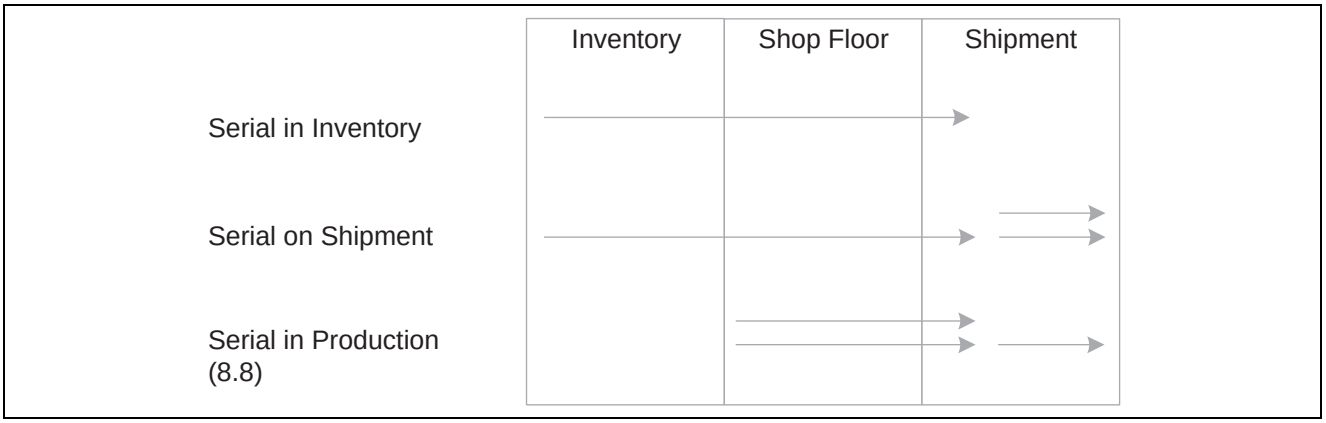
This chapter provides an overview of serial genealogy in PeopleSoft Manufacturing and discusses how to:

- 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:

This diagram illustrates PeopleSoft and serial processing prior to Release 8.9



Serial processing prior to Release 8.9

With PeopleSoft Manufacturing, you can trace the location and constituent components of finished goods items and trace source and usage of component parts during the production process.

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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 the 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:

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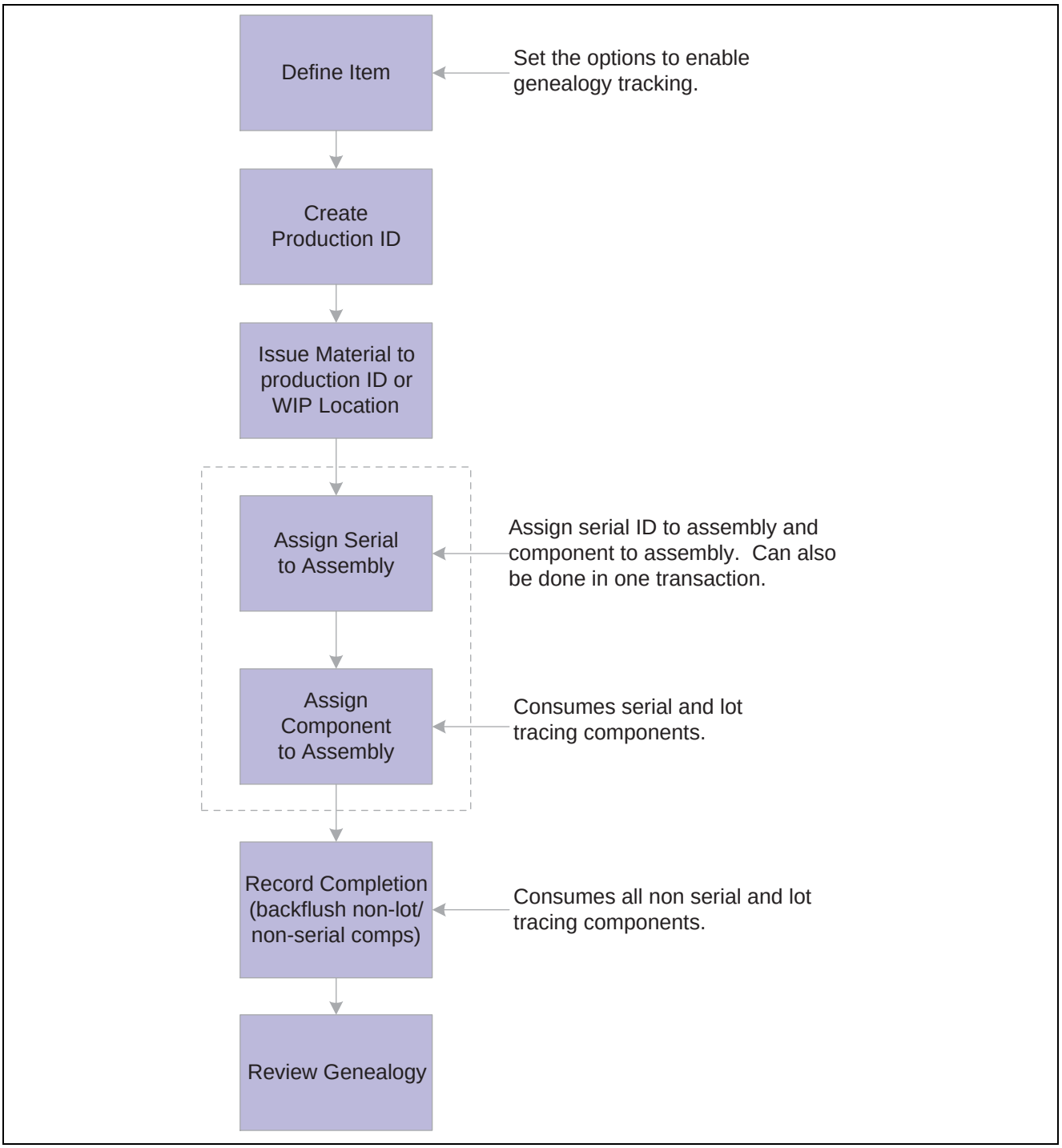

Serial Genealogy Process Flow

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See Also

Chapter 18, “Maintaining Production Orders and Production Schedules,” page 311

Chapter 22, “Issuing Material to Production,” page 417

Chapter 23, “Completing Operations and Recording Scrap,” page 455

Chapter 24, “Recording Completions and Scrap Using Electronic Data Collection,” page 517

Chapter 26, “Closing Production,” page 547

Setting Up Items to be Traced by Serial Genealogy

This section 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.

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See Also

Chapter 23, “Completing Operations and Recording Scrap,” page 455

Chapter 8, “Maintaining Bills of Material,” page 89

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, “Defining Items by SetID”

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.

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- *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 Enterprise Managing Items 9.0 PeopleBook, "Defining Items by SetID"

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 SCM Integrations navigations.

This section discusses how to:

- Associate assembly items to serial IDs.
- Associate components to serialized assemblies.

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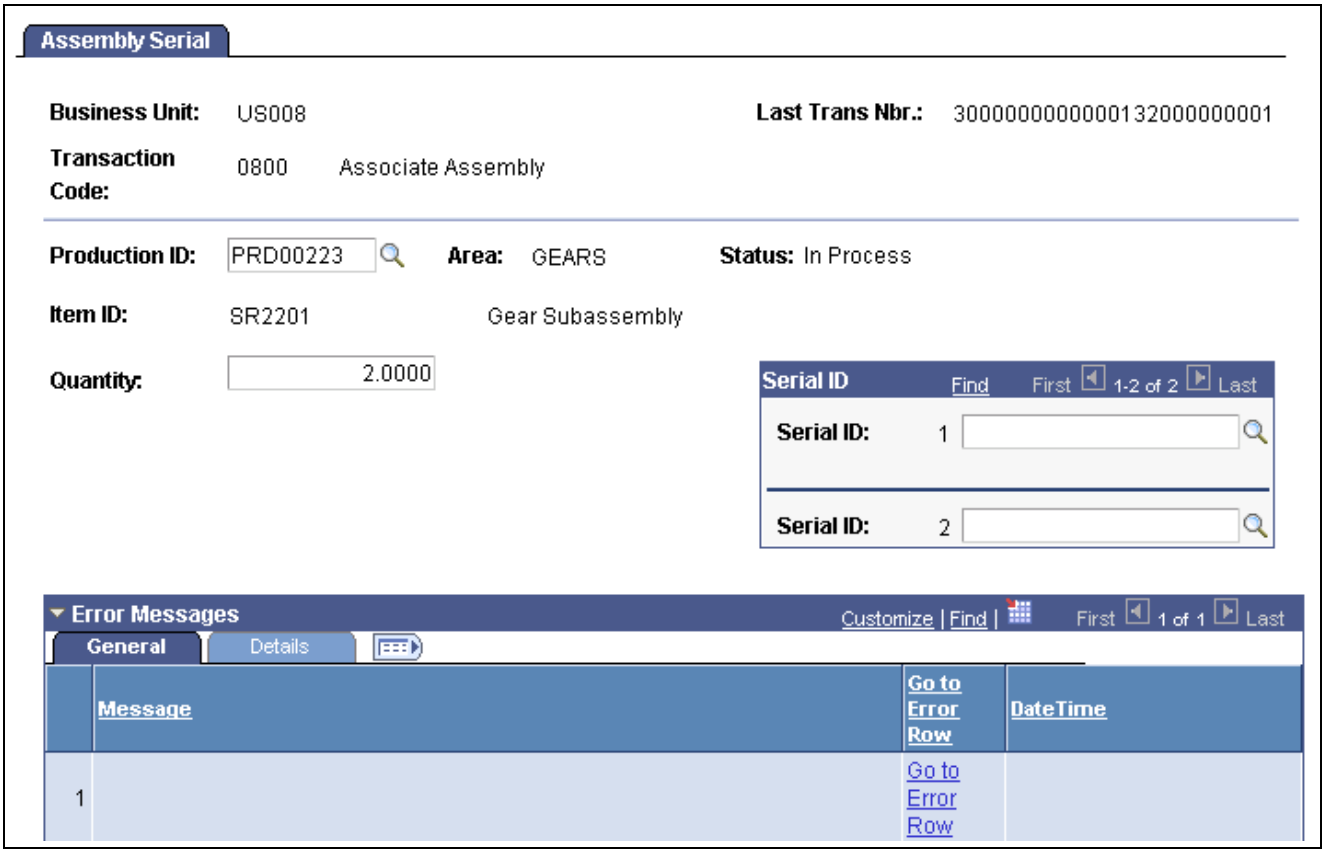
Pages Used to Associate Assembly Items and Components

Page Name	Object Name	Navigation	Usage
Assembly Serial	BCT_MG_PRDN	• Production Control, Process Production, Production Genealogy, Record Assembly Serial • SCM Integrations, Create Transactions, Manufacturing, Assembly Serial Association	Associate serial IDs with assembly items of a production ID. Use Transaction Code *800 — Associate Assembly* to associate a serial ID with a production ID.
Component Serial	BCT_MG_USAG	• Production Control, Process Production, Production Genealogy, Record Component Serial • SCM Integrations,, 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 page

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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 SCM Integrations 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 291.

Associating Components to Serialized Assemblies

Access the Component Serial page.

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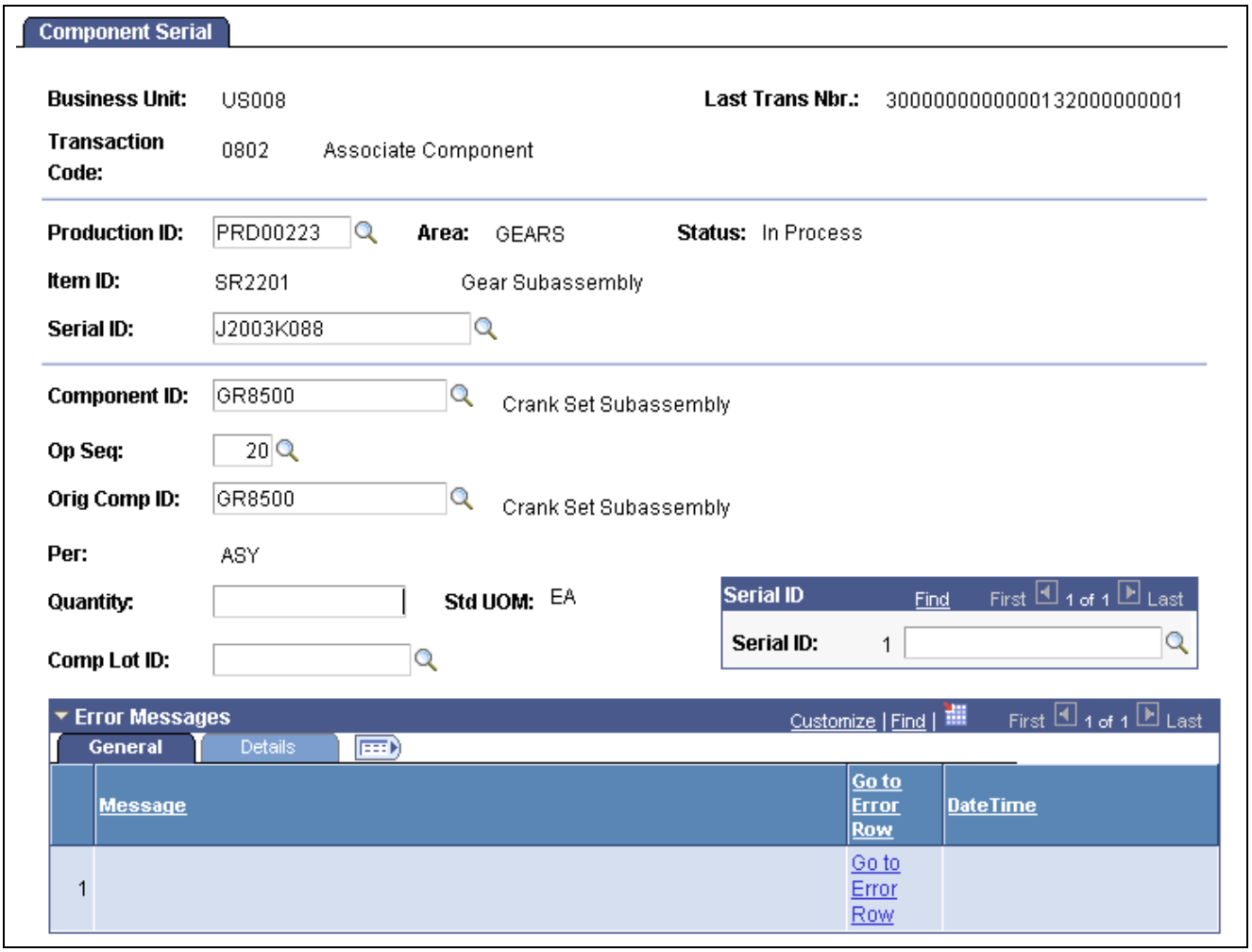

Component Serial page

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.

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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 SCM Integrations 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 291.

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 SCM Integrations navigations.

This section discusses how to:

- Disassociate assemblies from serial IDs.
- Disassociate components from serialized assemblies.

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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 • SCM Integrations, Create Transactions, Manufacturing, Assembly Serial Association	Disassociate serial IDs with assembly items of a production ID. Use Transaction Code *0801-Disassociate Assembly* to disassociate a serial ID from the assembly.
Component Serial	BCT_MG_USAG	• Production Control, Process Production, Production Genealogy, Record Component Serial • SCM Integrations, 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 SCM Integrations 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 291.

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.

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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 SCM Integrations 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 291.

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.
Maintain Genealogy	SF_TRC_MAINT	Production Control, Process Production, Production Genealogy, Maintain Serial Genealogy	View the parent serial ID information.
Production Picking	BCT_MG_PIK	SCM Integrations, 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 417.
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 • SCM Integrations, 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 417.

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Page Name	Object Name	Navigation	Usage
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 417.
Recording Completions and Scrap	SF_COMPL_ID, BCT_MG_CPL	• Production Control, Process Production, Complete Production, Record Completions and Scrap • SCM Integrations, 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 455 and Chapter 24, "Recording Completions and Scrap Using Electronic Data Collection," page 517.

Reviewing Serial Genealogy Information

This section discusses how to:

- Enter genealogy search review criteria.
- Review serial genealogy information.
- Review traceability information.

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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.

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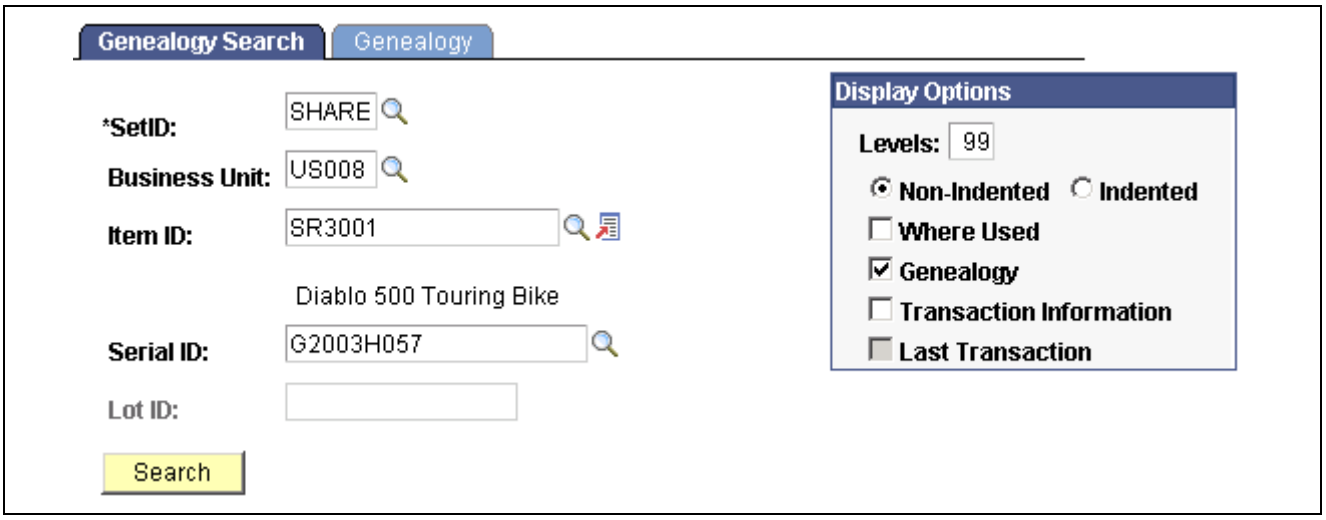

Genealogy Search page

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.

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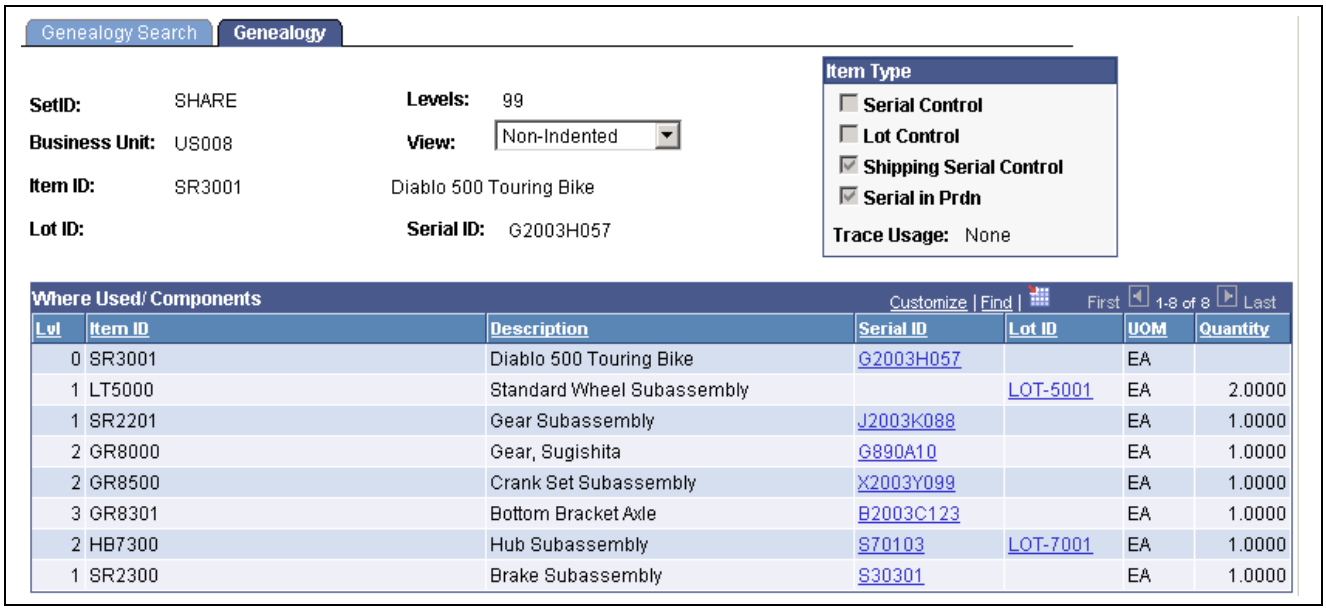

Genealogy page

Item Type

Serial Control, Lot Control, Shipping Serial Control, Serial in Prdn, and **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.

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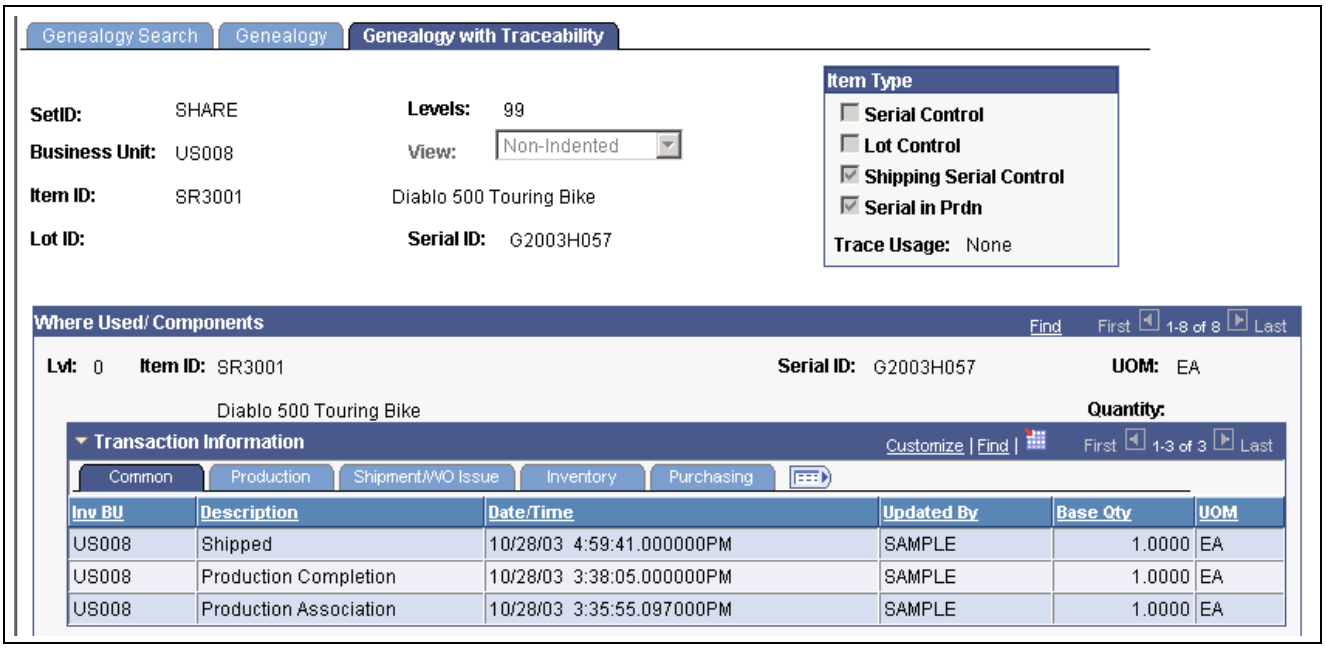

Genealogy with Traceability page

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 Enterprise Supply Chain Management Integration 9.0 PeopleBook, “Implementing Integrations”

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 SCM Integrations navigation. You will also need to run this process if you have used the Production Serial Association EIP to load associate or disassociate transactions.

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Page Used to Make Serial Associations Using the Batch Process

Page Name	Object Name	Navigation	Usage
Run Serial Assoc	RUN_SF_TRC	• SCM Integrations, 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 SCM Integrations 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	SCM Integrations, Barcode Labels, Serial Label	Create barcoded serial labels for serialized items. See *PeopleSoft Enterprise Inventory 9.0 PeopleBook*, "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.

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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 the 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 609

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CHAPTER 17

Setting Up Production Areas

This chapter provides an overview of production areas and discusses how to define 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 the 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.
- Define a set of WIP accounts for each production area.

Note. You cannot delete production areas.

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.
- A subcontractor will perform any operation on the item's routing.

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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
- Use component's

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 the 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. The Kit 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 cases, 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 these cases, 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.

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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 the 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 421

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Understanding the Flow Production Process"

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Setting Up PeopleSoft Flow Production"

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Items at the Business Unit Level

Setting Up WIP Accounts for Location Accounting

If you are using location accounting to provide financial visibility based on where the 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 the business units and inventory storage areas.

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To use location accounting, define a set of account ChartFields, such as account, operating unit, department, product, and 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 Enterprise Inventory 9.0 PeopleBook, "Structuring Inventory," Defining and Maintaining Material Storage Locations

PeopleSoft Enterprise Cost Management 9.0 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 305

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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 Enterprise Inventory 9.0 PeopleBook, "Structuring Inventory," Defining and Maintaining Material Storage Locations

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by SetID"

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining and Using ChartFields"

Chapter 15, "Defining Production Options," page 253

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.

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- 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 (SF_PRDN_AREA) component.

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.

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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.

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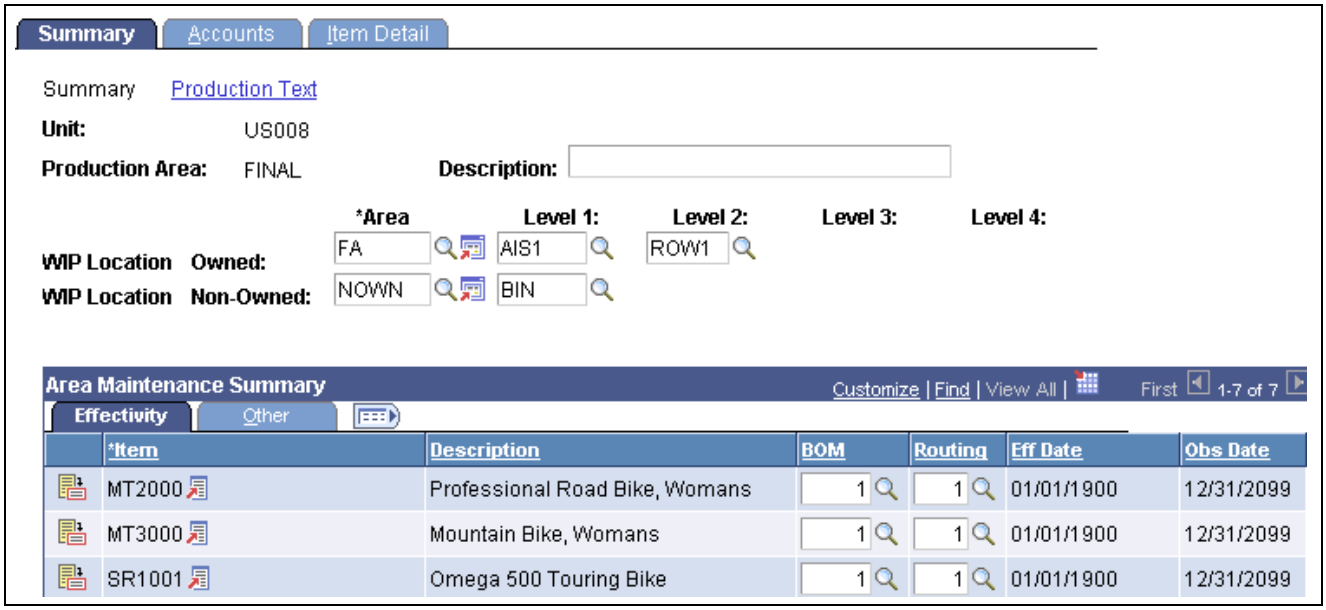
Defining Production Area Summaries

Access the Summary - Summary page.



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 the 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 the 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.

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- 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

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.

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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

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.

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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 253

Chapter 8, "Maintaining Bills of Material," page 89

PeopleSoft Enterprise Engineering 9.0 PeopleBook, "Maintaining Engineering Bills of Material"

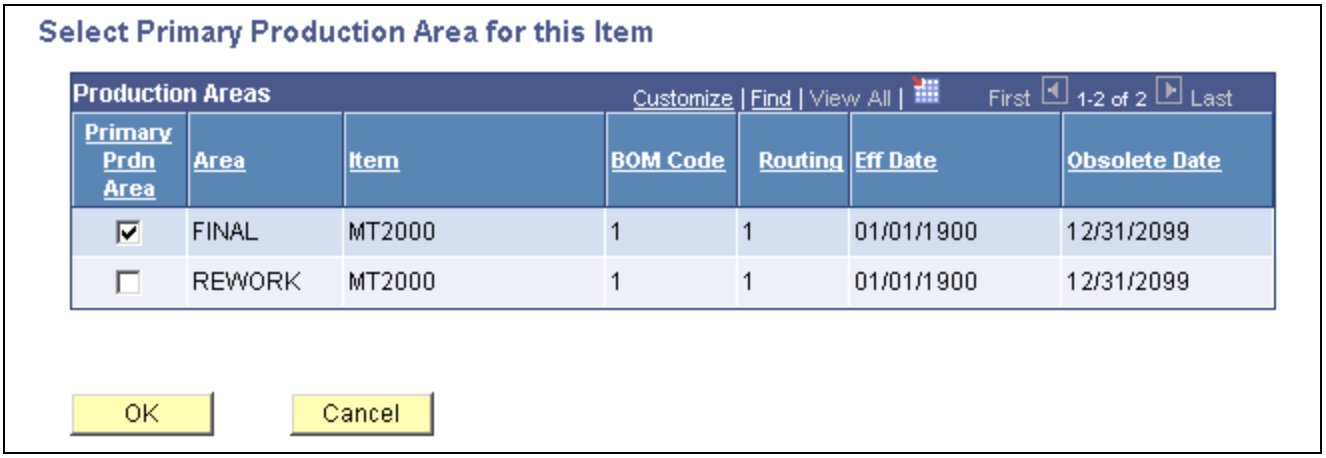
PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Manufacturing Information for an Item

Chapter 13, "Maintaining Tasks," page 209

PeopleSoft Enterprise Product Configurator 9.0 PeopleBook, "Using PeopleSoft Enterprise 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 page

The primary production option identifies the primary production area for a specific BOM and routing code combination. This occurs because PeopleSoft Supply Planning enables 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

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Production Area	BOM Code	Routing Code	Primary Production Area?
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! Before you can associate accounts to the production area, you must first define ChartFields using the Define Values page. Select Set Up Financials/Supply Chain, Common Definitions, Design ChartFields, Define Values.

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.

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Cost Element, Account, Alternate Account, Operating Unit, Fund Code, Department, Program Code, Class Field, Budget Reference, Product, Project, Affiliate, Fund Affiliate, and **Statistics Code**

Select 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 the 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.

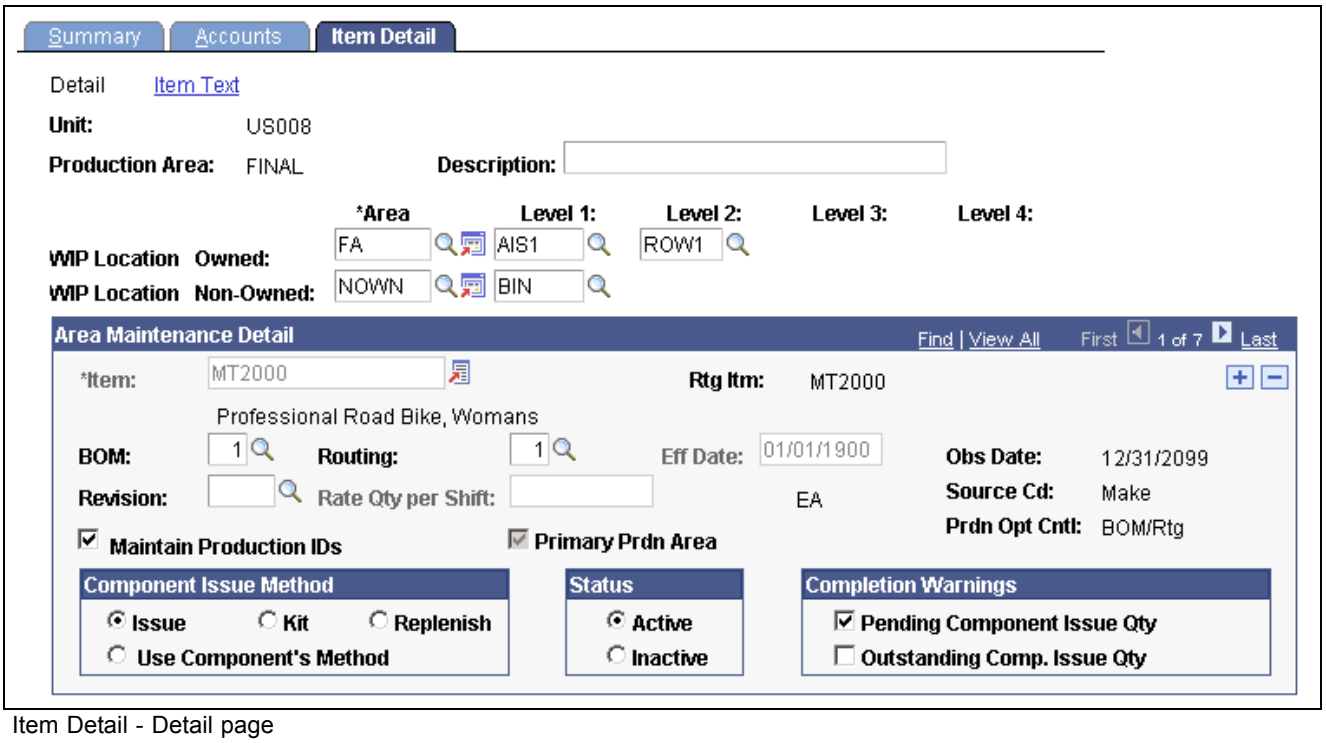
See Also

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Preparing to Implement PeopleSoft Inventory," Setting Up Location Accounting

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Editing ChartField Combinations"

Defining Production Area and Item Detail

Access the Item Detail - Detail page.



Item Detail - Detail page

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Owned and Non-Owned WIP Locations You can change the values for these fields.

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.

BOM and **Routing** codes You can change the values for these fields.

Revision (Optional) Select a revision to use for this item.

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.

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.

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 296.

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.

Completion Warnings Select a value to indicate the situations in which warnings should be sent during the completions process:

- Pending Component Issue Qty: Select if there are pending component issue quantities.
- Outstanding Comp. Issue Qty: Select if there are outstanding component issue quantities.

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See Also

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Working with Items," Establishing Quantity Precision and Rounding Rules for Items

Chapter 14, "Structuring Routings," Defining and Viewing Master Routings, page 238

Chapter 17, "Setting Up Production Areas," Selecting the Primary Production Area, page 305

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 555.

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CHAPTER 18

Maintaining Production Orders and Production Schedules

This chapter provides an overview of production orders (IDs) and production schedules, and discusses how to:

- Create production IDs.
- Generate production ID splits.
- Create 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 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 has not 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 the 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 set up any operation on the item's routing as a subcontracted operation.

If you use production schedules, you can 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. This enables 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 the 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 to 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

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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 an order or scheduled quantity no longer exists.

Important! PeopleSoft Supply Planning does not 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. The following sections 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

Chapter 23, "Completing Operations and Recording Scrap," page 455

Production Types

When you manufacture items, you may need to perform additional work on a completed end item that has already been moved out of production and into stock. You might 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 that are 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 and item level for each component.

The issue method appears automatically from the Define Business Unit Item - Manufacturing page, and it can be overridden on the Production Area - Item Detail page.

You cannot 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

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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 have not 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 in addition to the end item. You can select a rework routing code.

If you change the production type to *Production,* you are 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 down an end item into its component parts and return the components to inventory. The system does not use a BOM for teardown production, but it 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 is not 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 items that you need in addition to 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.

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Production Statuses

Every production ID and production schedule has a status that indicates 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 production with the status *Entered.* 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 component, the Production ID Status Change page, or the Production Schedule Status Change page.
- Record end item completions and scrap for *Entered* orders if you release production using the Record Completions/Scrap component.
- Select an option at the business unit level to release production IDs automatically, to prompt you when releasing production IDs, or to not 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 cannot generate a picking plan for a *Firmed* order.

You can:

- Change the production status from *Firmed* to *Released* using the either the Production ID Maintenance component, the Production Schedule Maintenance component, the Production ID Status Change page, or the 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.
- Select an option at the business unit level to release production IDs automatically, to prompt you when releasing production IDs, or to not release production IDs automatically.

If you change the production start quantity or the 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 can 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 kit issue method. An output list is created with the rework item as the primary output.

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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 these 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 change the production start quantity 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 does not 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 quantity 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, the 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.

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- If you decrease the production start or production end quantity, the system verifies that you are not 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.

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See Also

Chapter 3, "Defining Your Business Unit Structure," Setting Up Manufacturing Business Unit Options, page 32

Chapter 21, "Releasing Production and Changing Production Statuses," page 407

Chapter 23, "Completing Operations and Recording Scrap," page 455

Chapter 26, "Closing Production," page 547

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 is not 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 it 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 and item level for each additional component. The default issue method is set on 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 the *Firmed* status for production scheduled for future dates. The system creates frozen rework component lists and operation lists.

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Teardown Production

You cannot 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 and item level for each additional component. The default issue method is set on 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 are prompted to enter the serial ID that is issued to the rework or teardown production ID.

See Also

Chapter 21, "Releasing Production and Changing Production Statuses," page 407

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 by PeopleSoft Supply Planning.
- Manually adding production IDs by using PeopleSoft Manufacturing pages.
- Manually adding production schedules by using PeopleSoft Manufacturing pages.

Note. Use the PeopleSoft Supply Planning solvers to manage and schedule the 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 the 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 3/29/07. You just defined a production date of 3/29/07 with three production shifts: 1, 2, and 3. In this example, shift 1 runs from 7 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 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, the production dates and actual dates are the same. If you have production shifts that span multiple standard calendar dates, the actual date for production may be different than the production date. The system determines the actual date by the actual time that the 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.

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Shift That 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 a.m. and ends at 4 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 3/25/07 and the due time is 3:30 p.m. Because this shift does not span multiple standard calendar dates, the production due date and shift for the production is 3/25/07, shift 1.

Shift That 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 the shift codes using the Shift Codes page. Associate this shift code with 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 and 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 the present example, production is due to end on 3/26/07 at 1:30 a.m. Because the shift in which production takes place actually begins on 3/25/07 at 8 p.m., the production date and shift is recorded as 3/25/07, shift 3. The actual date and time appears as 3/26/07 at 1:30 a.m.

Example 2: Production Date Time Set to End Time

Suppose that a company runs three shifts, and 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 the present example, production is due to end on 3/27/07 at 5:30 a.m. Because the shift ends at 6 a.m. and the flag indicates the production date is set to the shift's end time, the production due date and shift is 3/27/07, shift 1. The actual due date and time appears as 3/27/07 at 5:30 a.m.

When defining production IDs, you specify the actual date and time information, and the system determines the corresponding production date and shift information. When defining production schedules, you 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.

Regular Production Scheduling

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.

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Production IDs and Production Schedules Using PeopleSoft Supply Planning

PeopleSoft Supply Planning 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 the PeopleSoft Supply Planning solvers to schedule and reschedule production:

- Freeze production within PeopleSoft Supply Planning and apply the 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 the recommendation into a production ID with an *Entered, Firmed,* or *Released* status.

  If you are using the Production ID Maintenance component to change any information on the production ID that affects scheduling, the system displays a warning message that indicates production is frozen and any of the changes result in rescheduling the production. You can override the frozen status by proceeding and changing the information, or you can cancel the 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 it takes into account the following 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 returned to the transactional system using the Post Updates process (PL_POST). 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 by using the Review Post Errors component.

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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 341

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 component 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. The 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. Because production schedules are always backward scheduled, you 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 are 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.

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- Calculate actual start dates and times and due dates and times for each operation in the manufacturing process.

Calculating Start and Due Dates for Production IDs and Production Schedules in PeopleSoft Manufacturing

PeopleSoft Manufacturing calculates start and due dates based on the production item's routing, and does not include other production that uses 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.
- Setup that can occur during queue time (or at any time once production begins).
- Setup time that is included in scheduling the operation.
- Operation intensity.
- Work center calendar, if one exists.
- Production calendar, if one exists.
- 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 the operation list is modified.

See Also

Chapter 18, "Maintaining Production Orders and Production Schedules," Production IDs and Production Schedules Using PeopleSoft Supply Planning, page 320

Chapter 28, "Understanding Scheduling Operations," page 559

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 enable 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 Enterprise Product Configurator 9.0 PeopleBook, "Using PeopleSoft Enterprise Product Configurator"

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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 does not 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 that is then copied to the operation list.

- Manually create an operation list if a rework or teardown routing has not 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 does not 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 treats rework and teardown requirements for a resource in the same manner as regular production.

Note. You cannot 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," Regular Production Scheduling, page 319

Production ID Splits

Occasionally, during the production process you may need to 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 enables you to complete what you can and close out the order. The remaining quantities requiring material or resources remain 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:

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- 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 has not 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 (production-ID to production-ID 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 cannot perform production ID splits under these circumstances:

- Production IDs that have subcontracted operations in process cannot be split.
- Co-products cannot be split to primary items.
- Splits across production types—production to teardown, rework to production, or teardown to rework—are not allowed.

Note. Production schedules cannot be split.

When splitting production IDs being tracked by serial genealogy, you are 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 is moved to the new production ID.

Production order splits are permanent, and after they're created, the production orders cannot 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 536

Chapter 18, "Maintaining Production Orders and Production Schedules," Generating Production ID Splits, page 345

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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 do not want PeopleSoft Supply Planning to reschedule those orders.
- Override this default using the Planning Attribute page, which is available from the Production ID Maintenance component and the Production by Area Details component.
- If the production ID or production schedule has a frozen status and you change information that affects the actual start or due dates and times, PeopleSoft Manufacturing displays a warning message indicating that the production is frozen.
- You can continue, or you can cancel the 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 affect 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 32

Chapter 18, “Maintaining Production Orders and Production Schedules,” Using Planning Attributes, page 341

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.

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- Change a component list or operation list.
- Change an output list.
- Split a production ID.

When the system publishes 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.
- You release production IDs or production schedules in either PeopleSoft Manufacturing or the MES.
- You perform detailed production scheduling, production monitoring, and reporting in the MES.

See Also

Chapter 5, "Integrating with Third-Party Systems," page 51

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 by using the production Area Maintenance component or the Production Option Maintenance component.

  The production area and 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.
- The production calendar is defined.
- The five-day work week is defined for the business unit if you are not 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 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 that you manufacture.
- Any work center calendars.

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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:

- *Forward:* 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.

- *Backward:* 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, **Start Time**,**Due Date**, and **Due Time** — The beginning and completion dates and times for the production based on the scheduling method. Forward scheduling uses start dates and times; backward scheduling uses due dates and times.

Revision — Code is indicated if item is revision-controlled.

Production Type — Type of production being manufactured: *Production, Rework,* or *Teardown*.

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.

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See Chapter 16, "Using Serial Genealogy in PeopleSoft Manufacturing," Defining Items Using Serial Genealogy, page 279.

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 were not 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.

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 and shift information and production due date and shift information.
- Locate the original production ID used to create teardown item.
- Use planning attributes.
- Display production ID detail.
- Maintain production ID output information.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology

Chapter 5, "Integrating with Third-Party Systems," page 51

Chapter 8, "Maintaining Bills of Material," page 89

Chapter 14, "Structuring Routings," page 221

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

Common Elements Used in This Section

Op Seq (operation sequence) The operation step in the manufacturing process where the components are required.

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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)	End item source code. Options are *Make* or *Buy*.
Task Code and **Description**	Task code number and description of the task being performed.
Sub (subcontracted operation)	Indication that the operation step is a subcontracted operation.
Work Center	Work center where the operation step is performed.
Configuration Code	Indication that the output or component is a configured item.
Output Qty (output quantity)	Output production quantities based on per assembly or per order setting.
Per	Quantity qualifier. Options are *Asy* (assembly) or *Ord* (order).
Res % (resource allocation percentage)	Percentage that 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 100percent.
Qty (quantity)	Component quantity required based on per assembly or order.
Sched Qty (schedule quantity)	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**	Original component if the current component is a substitute item.

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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 and shift information or production due date and shift information for the selected production ID.
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 and routing code combination that you want to use for the production ID.
Process/Output Options	SF_PRNT_OPT_SP	Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance Click the Setup Print Options link.	Select the print options for printing production documents at save.
Teardown Original Production ID Search	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.

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Page Name	Object Name	Navigation	Usage
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.
Production ID Outputs	SF_PRDN_OUTPUT	• Production Control, Define Production, Production IDs/Schedules, Maintain PIDs, Production ID Maintenance. If you're adding a new production ID, the Production ID Outputs page is not available until after you save the page. • Select *View Outputs* from the Action Menu on the Production ID Maintenance page.	Maintain and display production output information.
Traceability	SF_PRDN_TRC	Click the View Serial Info link on the Production ID Maintenance page.	View the assembly serials that have been associated with the production ID. **Note.** You can only access this page if the serial IDs have been associated with the production ID. See Chapter 16, "Using Serial Genealogy in PeopleSoft Manufacturing," Reviewing Traceability Information, page 290.
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 the 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.

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Page Name	Object Name	Navigation	Usage
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.
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.

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Page Name	Object Name	Navigation	Usage
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.
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. **Note.** 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.

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Page Name	Object Name	Navigation	Usage
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.
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

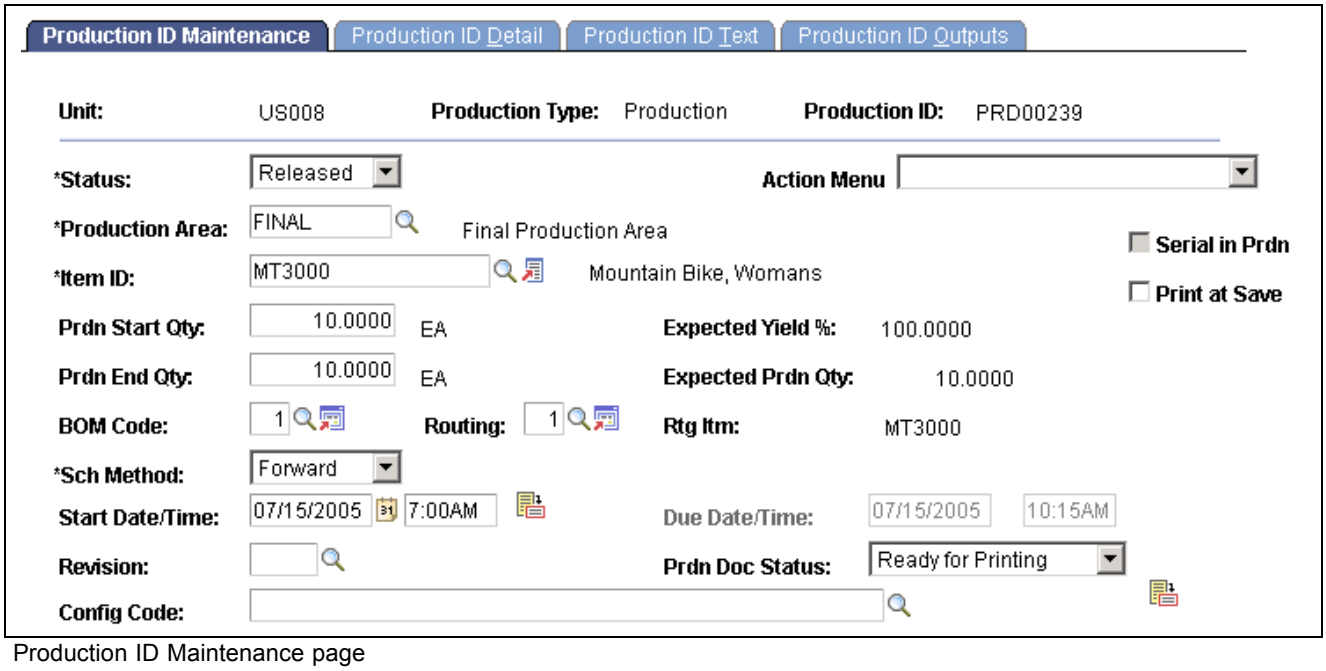
Chapter 18, "Maintaining Production Orders and Production Schedules," Maintaining Production ID Output Information, page 343

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 604

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2004 - Production Report, page 605

Adding and Maintaining a Single Production ID

Access the Production ID Maintenance page.



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.

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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 they are not used when creating or maintaining a production ID.

Maintaining Production ID Information

Production Area

Select to indicate 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 cannot add a production ID for an item that has not previously been defined in the production area selected. Additionally, you must have selected 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* status.

If the production ID has a status of *Released,* you can change the item for any production as long as subcontracted purchase orders have not 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 deletes the existing component list and operation list, and it then creates a new component list and operation list for the new item.

  Once production has a status of *In Process,* you cannot change the item ID on the 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 simultaneously specify a new item.

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)

Displays 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 at each operation 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.

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Prdn End Qty (production end quantity)
Displays 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 at each operation to account for any operation yield.

Production end quantity may be changed when operation yields are maintained. As production is reported against the production ID, the end quantity is updated to reflect actual production yields.

Expected Prdn Qty (expected production quantity)
Displays the quantity expected at the end of the production process. This is the expected quantity at the time production was started. It is not updated to reflect actual production variances, but it is updated if the production ID quantity is manually changed.

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 points 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's scheduled quantities.
- If the production ID is *In Process* and you increase or decrease the order quantity, the system adjusts the component's 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.
- 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 is not 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.

  Note. If a subcontracted operation has more than one purchase order, the system will not automatically create change requests. You will need to manually create the change requests.

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- You cannot decrease the production quantity to a quantity less than the quantity that has 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 Code and **Routing Code**

The values appear by default for the production area and item combination effective for the area and item as of the current date. Change the BOM and routing codes 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 do not select a rework or teardown routing, the system does not create an operation list for the 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 can 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 in the Production Option Maintenance component.

Select valid production options (predefined BOM and routing combinations) for the item. If you select the Valid Production Options only option on the Item Attributes by Unit - Manufacturing page, then only the predefined combinations can be entered or selected.

Click the Production Option button to access the Production Option Selection page.

Note. If you create a component list and there are operations linked to the components that do not exist on the routing, the system treats those components as linked to the first operation sequence. This is similar to how the system handles a component with a 0 operation sequence. Unmatched output by-products, on the other hand, are linked to the last operation.

Once you add the production ID, keep these points 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.

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- If the production ID is in the *Firmed* or *Released* status, you can change the routing code only if a subcontracted purchase order has not 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 *Forward*. If you are using the production completion date as a basis for creating the schedule for the production ID, select *Backward*.

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 points in mind when entering a start date and time or a due date and time:

- If a routing is not 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:* This is the default if the production ID status is *Entered.*
- *Ready to Print:* This is the default if the production ID status is *Firmed.*

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The system prints production documents when the production ID's status is *Firmed* or later.

- *Printed:* This indicates that documents have already been printed.

  You can only print production documents when the production ID's status is *Firmed* or later.

Print at Save Select to print production documents for the production ID at save time.

Action Menu Select any of these pages to access additional information:

- *Update Comp List* (update component list): Click 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 371.

- *Update Op List* (update operation list): Click 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 389.

- *View Outputs:* Click to access the Production ID Outputs page to view the outputs associated with this production ID.
- *View Serial Info:* Click to access the Traceability page, where you can view the assembly serial IDs that have been associated with this production ID.
- *Review Proactive Costing:* Click 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 Enterprise Cost Management 9.0 PeopleBook*, "Managing Actual and Average Costing," Capturing Production Costs.

- *Planning Attributes:* Click to access the Planning Attribute page.

  See Chapter 18, "Maintaining Production Orders and Production Schedules," Using Planning Attributes, page 341.

- *Peg to Demand:* Click to access the Pegging Workbench to peg the production ID to a sales order.
- *Show Pegged Demand:* Click to access the Pegging Inquiry page to view any pegged orders.

  See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Pegging Supply and Demand".

- *Setup Print Options:* Click to access the Process/Output Options page to select different print criteria for the production documents.
- *Process Monitor:* Click to access the Process List page.

  See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler.*

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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 359.

Viewing Production Start Date and Shift Information and Production Due Date and 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 do not 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 does not 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 affect 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.

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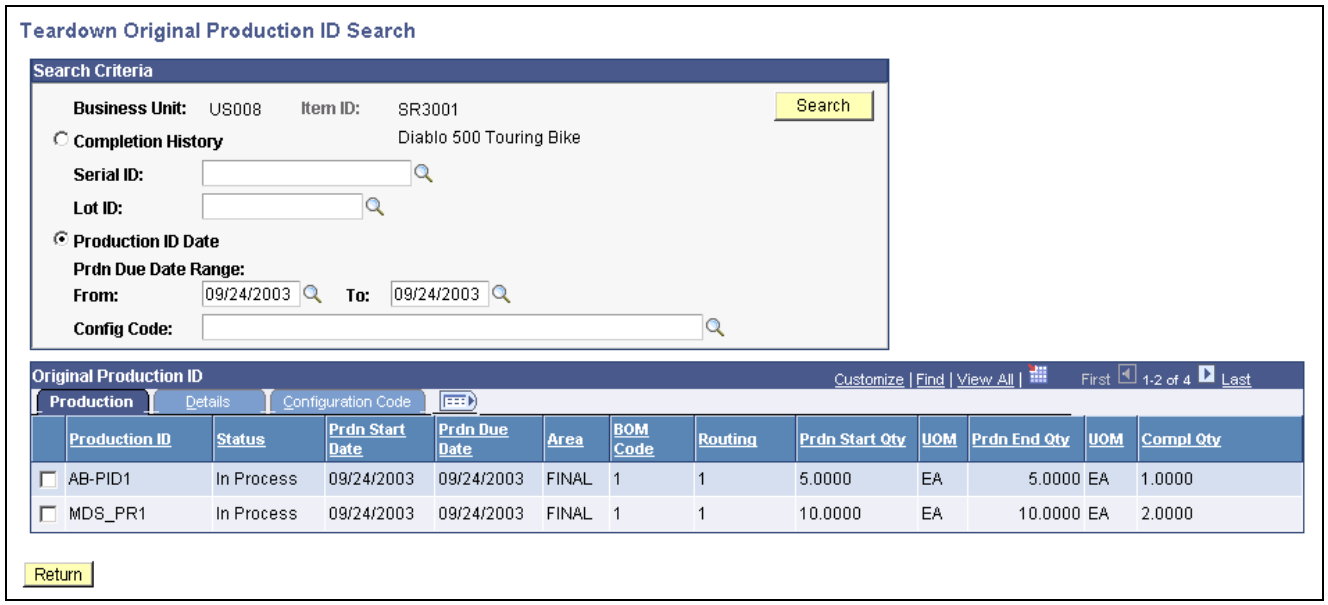

Teardown Original Production ID Search page: Production tab

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 values.

You can also select a production due date range or configuration code from the available options. After you make the selections, click Search for a list of production IDs. If multiple production IDs were used to create the 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 to freeze substitutes in PeopleSoft Supply Planning. When you send the production ID to PeopleSoft Supply Planning, the Planning engine does not include substitute components.

Frozen Production Select to freeze the production ID in the PeopleSoft Supply Planning system. This means that when you send the production ID to PeopleSoft Supply Planning, the Planning engine does not 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 do not want PeopleSoft Supply Planning to reschedule those orders.

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See Also

Chapter 3, "Defining Your Business Unit Structure," Setting Up Manufacturing Business Unit Production Options, page 36

Chapter 15, "Defining Production Options," page 253

Chapter 14, "Structuring Routings," page 221

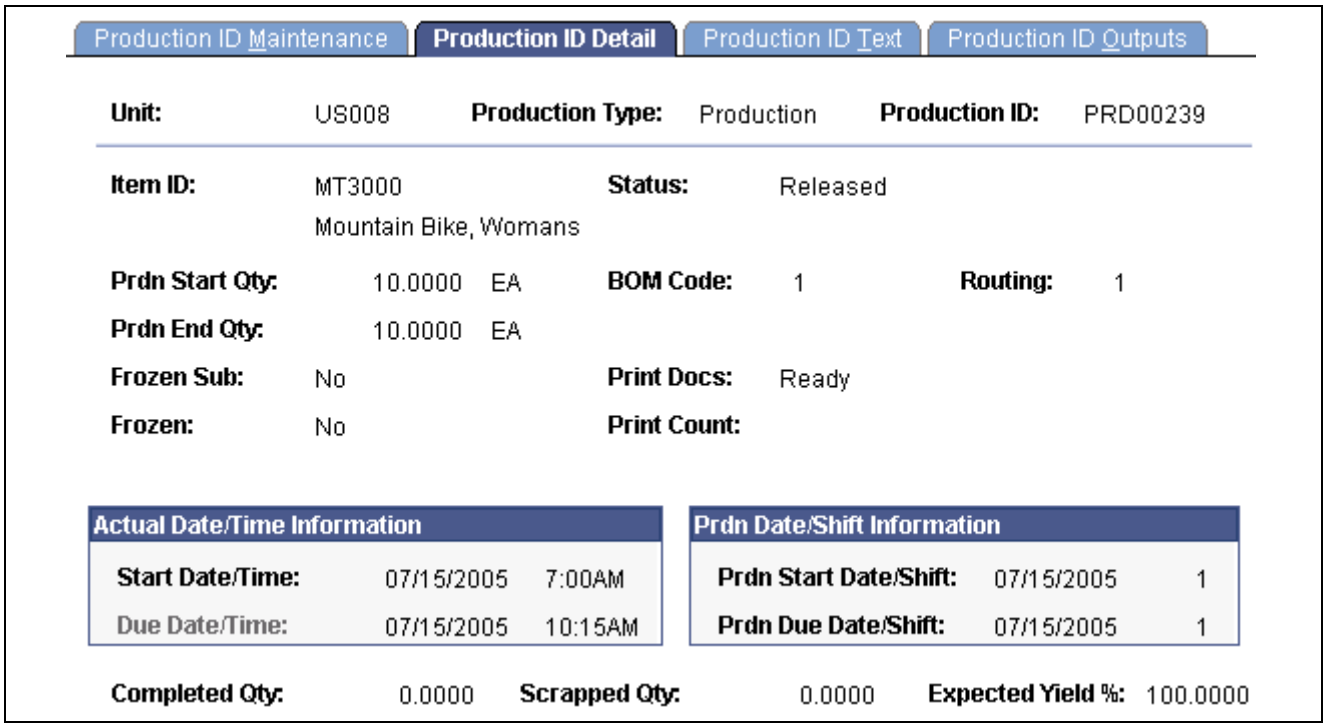
Chapter 18, "Maintaining Production Orders and Production Schedules," Maintaining Production ID Output Information, page 343

Chapter 22, "Issuing Material to Production," page 417

PeopleSoft Enterprise Product Configurator 9.0 PeopleBook, "Working With Configuration Codes"

Displaying Production ID Detail

Access the Production ID Detail page.



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 the changes. If you change this information, the production ID is no longer frozen and the status changes to *No*.

Frozen Substitutes Indicates whether the system has frozen substitutes in the PeopleSoft Supply Planning system. This means that when you sent this production ID to

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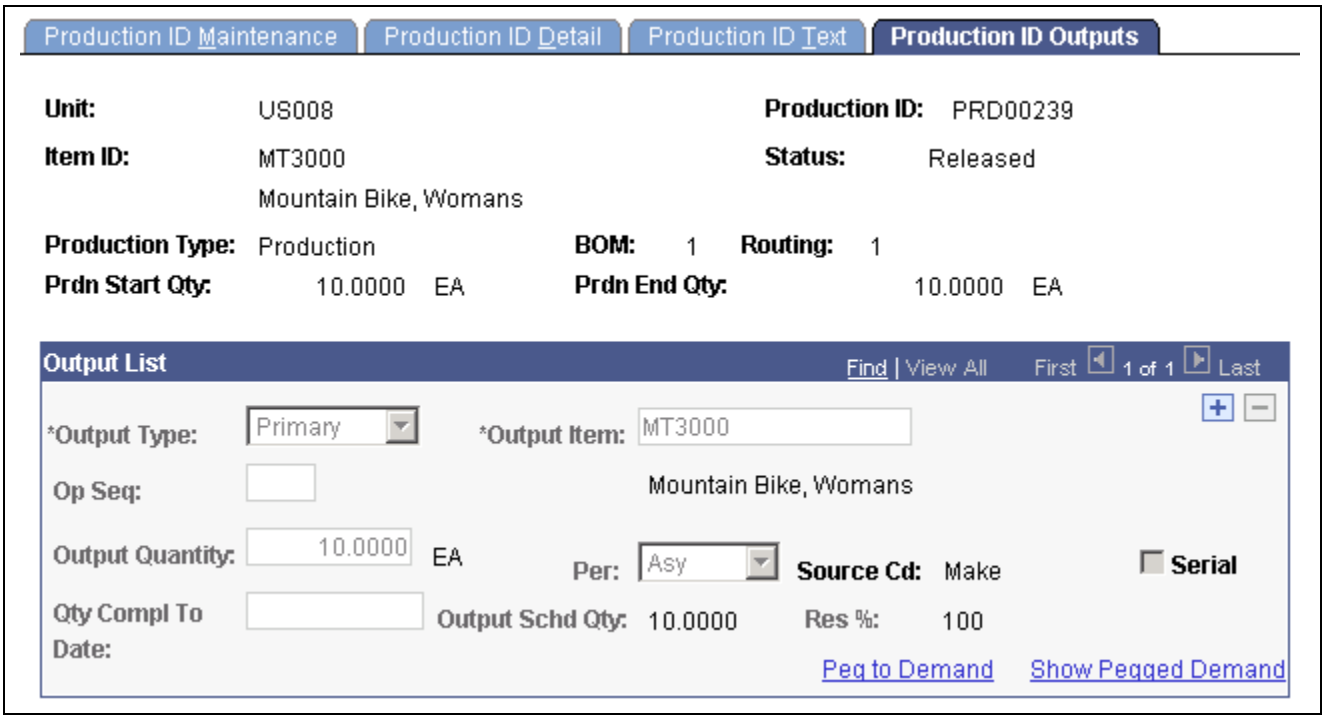
	PeopleSoft Supply Planning, the Planning engine did not include substitute components.
OM Business Unit (Order Management business unit), **Sales Order No** and **Configuration Code**	These fields display sales order information if the production ID results from a sales order configured in PeopleSoft Order Management.
Print Count	Indicates the number of times that production documents have been printed for the 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)	Indicates the number of assemblies that have been scrapped in process.

Maintaining Production ID Output Information

Access the Production ID Outputs page.



Production ID Outputs page

Output List

Output Type	Values are: • *Primary:* Main output from the manufacturing process.

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- *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 in which 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 does not 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. In that case, 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. The primary or co-product QPA is (BOM output quantity) ÷ (BOM quantity). The expected completions for the primary or co-product are (Expected completions at the last operation) × (Primary or coproduct QPA).

- By-product quantity.

  When determining the output for the recycled and waste products, the system uses 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.

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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 and 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 specified 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.

Peg to Demand Click this link to access the Pegging Workbench page to peg the production ID to a sales order.

Show Pegged Demand Click this link to access the Pegging Inquiry page to view any pegged orders.

See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Pegging Supply and Demand".

Adding Unplanned By-Products

Click the Add button to add an additional (unplanned) by-product. You can add or change *Recycle, Teardown,* or *Waste* by-products on the production ID; however, you cannot add or change primary items or co-products.

Note. You can only add teardown outputs to a *Teardown* type production ID. Similarly, you cannot add recycle or waste outputs to a *Teardown* production ID. However, you can change the output quantity, operation sequence, and Per field for any by-products.

Output Qty (output quantity) Whether you can enter a whole number or a decimal depends on unit of measure and quantity precision combination that was defined for the item in PeopleSoft Inventory.

Res % (resource percentage) Indicates the resource percentage for the primary and co-products.

Important! Only by-products such as recycle or waste products can be added or changed. You cannot 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 cannot define co-products or by-products with rework.

Generating Production ID Splits

When required, you can split a single production ID into two or more production orders.

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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 cannot 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.

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 select the assembly serial IDs to split.

  These serial IDs become disassociated from the original production ID and become associated with the new production ID. 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 can 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 that case, they are automatically transferred. You cannot make serial associations when transferring components during the production ID split process.

This section lists common elements and discusses 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 323

Common Elements Used in This Section

Component ID — Component that is in effect for the production ID at the time of the production split. The component may be a substitute item.

Op Seq (operation sequence) — Operation step in which 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.

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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, From Time, To Date, and **To Time** — Beginning and ending date for the production that you want to view. The date and time fields refer to the date and time when the completion transaction was recorded.

Date Timestamp — Date and time the production ID split transaction occurred.

Inquiries — Option that enables you to view specified production transaction information. Values are:

- *Completions Detail*
- *Component Consumption*
- *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 *In Process*.
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.

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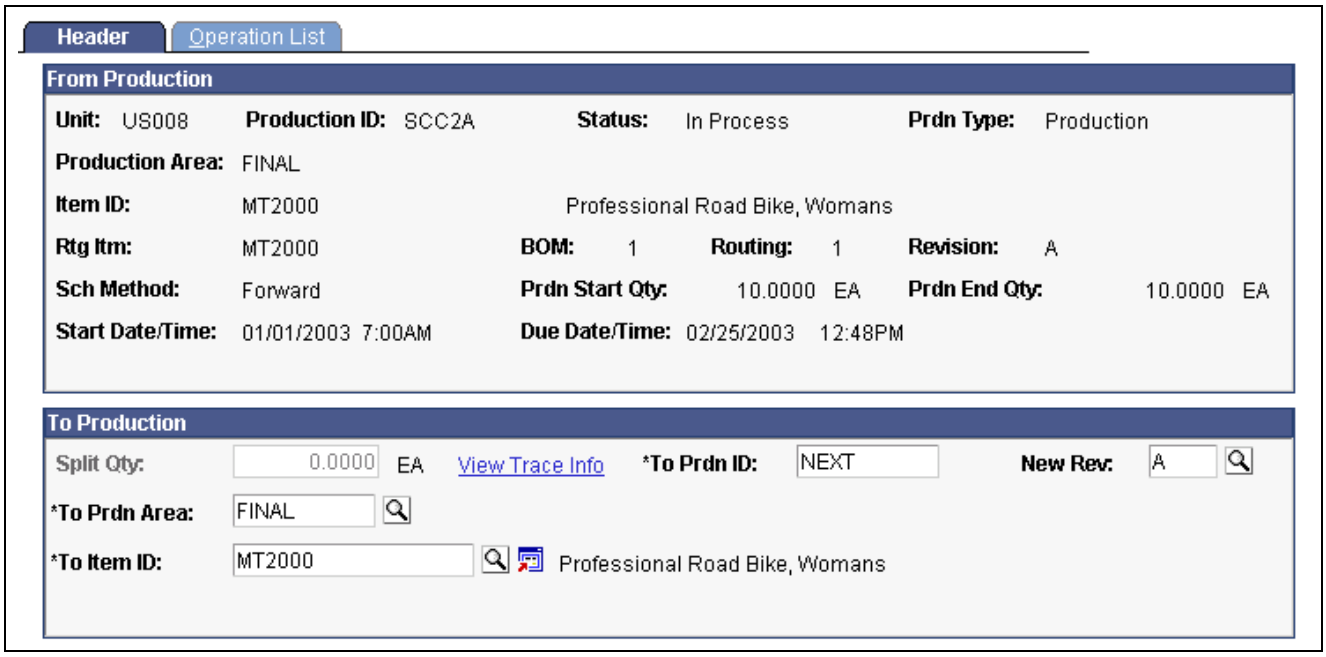
Page Name	Object Name	Navigation	Usage
Production History	SF_TRANSHIST	Production Control, Define Production, Review Production Information, Production History	View production transaction history.
Production History Details	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, 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.
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

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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 that you want to split from the original production ID. Whether you can enter a whole number or a decimal depends on the unit of measure and quantity precision combination that was defined for the item 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 cannot 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. Then you cannot split more than 20. If you enter a higher split quantity than the quantity that is available, you receive an error message.

View Trace Info Click 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 are not 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 as 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 are not based on the revision number entered in the New Rev field.

To Prdn Area (to production area) Select 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 is not 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—that is, 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 are not fully completed on the from Production ID. In that case, they are not copied.

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Note. If the To item ID in a production ID split has an item status of *Hold* or *Discontinue,* you receive a warning message; however, the warning message does not prevent you from performing the action.

These situations cannot 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 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

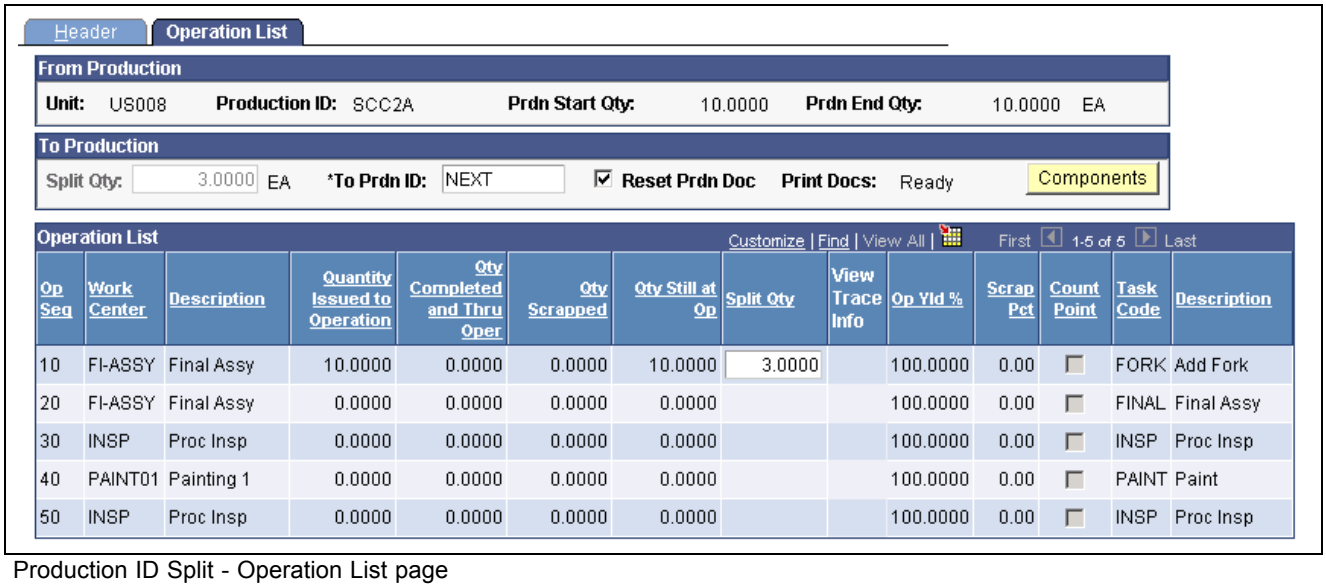
PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Making Stock Quantity Adjustments and Transfers Within the Business Unit," Making Stock Location Transfers Online

Chapter 22, "Issuing Material to Production," Issuing Material to the Shop Floor, page 437

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Working with Items," Managing Inventory by Item Status

Entering Production ID Split Quantities

Access the Production ID Split - Operation List page.



Production ID Split - Operation List page

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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 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 in which 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 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 quantity issued to operation is the production ID quantity.

Qty Completed and Thru — Quantity completed at the operation. This quantity does not 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 through 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 have not recorded any completions or scrap at any prior operations.

Scrap Pct (scrap percentage) — A weighted average of the scrap percentage specified when recording end item completions and scrap. This percentage represents the percentage of run time expended before the end item is scrapped.

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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** Task that is performed at the operation step.

See Also

Chapter 13, "Maintaining Tasks," page 209

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft 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 on the Lot/Serial page, which you access by clicking the button on the first column of the row. This field is display-only and cannot 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) Displays the quantity used based on the quantity completed at the operation multiplied by the quantity per assembly. If the component's quantity is

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	expressed per order, this is the quantity for each order. This quantity has not 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)	Displays 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	Displays the name of the original component ID.
OK	Click to return to the Operation List page.
Save	Click to process the production ID split. When you save the page, the production ID split is generated and these actions occur: • The To production ID is created with a production status of *In Process.* 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 are not 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 it 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 334

Chapter 23, "Completing Operations and Recording Scrap," Understanding Recording Completions and Scrap, page 455

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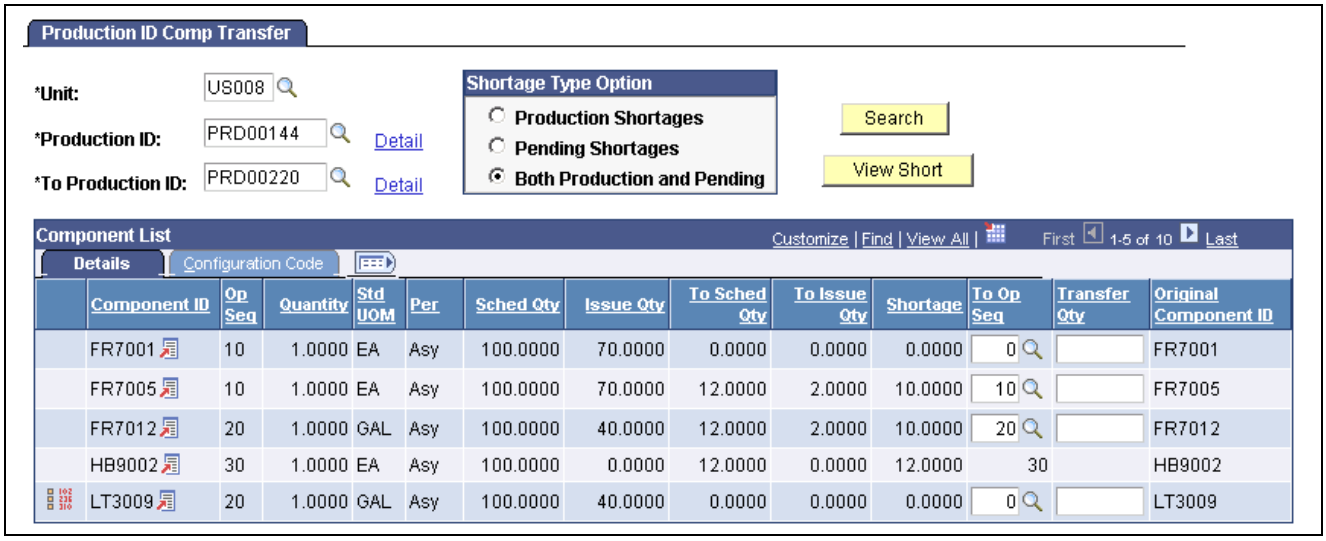
Making Production ID Split Component Transfer Adjustments and Transferring Components Between Production IDs

Access the Production ID Comp Transfer page.



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 only the components that currently have shortages on the To production ID. If you 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 create pending quantities in some instances) or insufficient quantity on hand was found and the full quantity could not 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.

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Click the Component Search button to access these links:

- 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 in which 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 the quantity that 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 the production plan, you may need to use the Production Schedule pages to manually enter or maintain production that you want to track by day and shift.

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 and item combination. You can add a schedule for production quantities that are in the *Entered* status at the summary level. Because you define production quantities due on a specific production due date and shift, production schedules are always backward scheduled. You also can maintain multiple production schedules per shift, and you can set the due time as well as the due date.

Note. You cannot use production schedules to track rework, teardown production, or regular production using the kit issue method. Rework BOMs and routings and teardown routings are not available for production schedules.

When you change any information on an existing production schedule, you can have the system send the Production ID Change workflow notification to selected roles that you define. These roles might include a planner or buyer or a production control manager.

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This section lists common element and discusses how to:

- Add and maintain production schedules.
- Define and view production details.
- View the production output list.

See Also

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

Common Elements Used in This Section

Frozen Select to freeze this production schedule in the PeopleSoft Supply Planning system.

Frozen Sub (frozen substitutes) Select to freeze substitutes in the PeopleSoft Supply Planning system. When you send the production schedule to PeopleSoft Supply Planning, the Planning engine does not include substitute components.

Revision Select if you want to use alternate revisions for the item if the item is revision-controlled.

Pages Used to Create 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. Add production IDs, or add, modify, and view all production for a specific production area.
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.

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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 Click the Production Detail button and select the Details link. • 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 or production ID. Add production IDs, modify, or view details for *all* production in a specific production area. **Note.** You must define at least one production schedule or production ID before you can access this page.
Production by Area	SF_PA_SCH_SUM_INQ	Production Control, Define Production, Review Production Information, Production by Area	View all production in a specific production area. **Note.** 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. **Note.** 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. **Note.** Define at least one production schedule for an item.
Production for an 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 Area/Item inquiry page.

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Page Name	Object Name	Navigation	Usage
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	SF_PRDID_ITEM_OUT	Production Control, Define Production, Review Production Information, Production for an Item, Production Output	View output information for a specific item. **Note.** Define at least one production ID or production schedule for an item.
Production Text	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. **Note.** 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.
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. **Note.** 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.

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Page Name	Object Name	Navigation	Usage
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. **Note.** 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. **Note.** 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. **Note.** 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	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View transaction history details based on the selection criteria such as Completions Detail, Consumption Detail, or Operation Detail.
Production Schedule by Area Report	RUN_SFS2007	Production Control, Define Production, Reports, Schedule by Area Report, Production Schedule by Area	View total quantities, by item, produced each day for each repetitive production area.

See Also

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2007 - Production Schedule by Area Report, page 606

Adding and Maintaining Production Schedules

Access the Production by Area Summary page.

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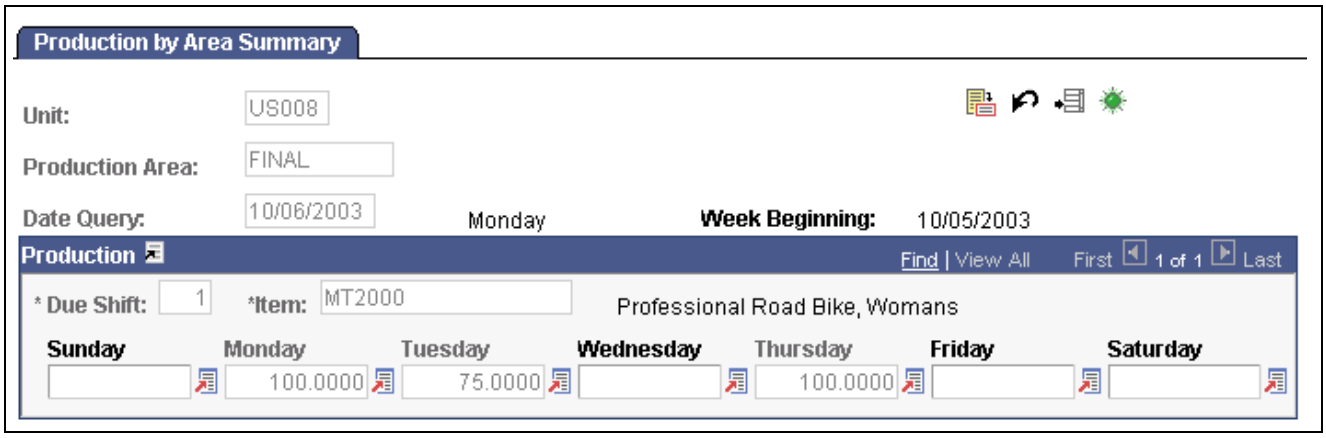

Production by Area Summary page

Date Query Enter the production due date to add or view production for the appropriate workweek. 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 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 an item 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 cannot change the item; you can only delete the schedule.

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Note. When adding an assembly with item status of *Hold,* you will receive a warning message. The warning message does not 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 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. ally, 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 cannot delete production quantities in the Production by Area Summary page. Navigate to the Production by Area Details page to delete quantities.

If a routing is not 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 does not exist for the routing's last operation's work center, the system uses the production calendar, if one exists.
- If a production calendar does not exist, the shift for the five-day work week is available.

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If you are adding production on the summary page, they are added in the *Entered* status. Access 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 (SFPCRSCH).

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 *In Process* 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.
If production is in the *Released* 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 *Firmed* 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 41

Chapter 23, "Completing Operations and Recording Scrap," page 455

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Working with Items," Managing Inventory by Item Status

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Working with Items," Establishing Quantity Precision and Rounding Rules for Items

Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Language Reference

Chapter 18, "Maintaining Production Orders and Production Schedules," Rescheduling Production, page 367

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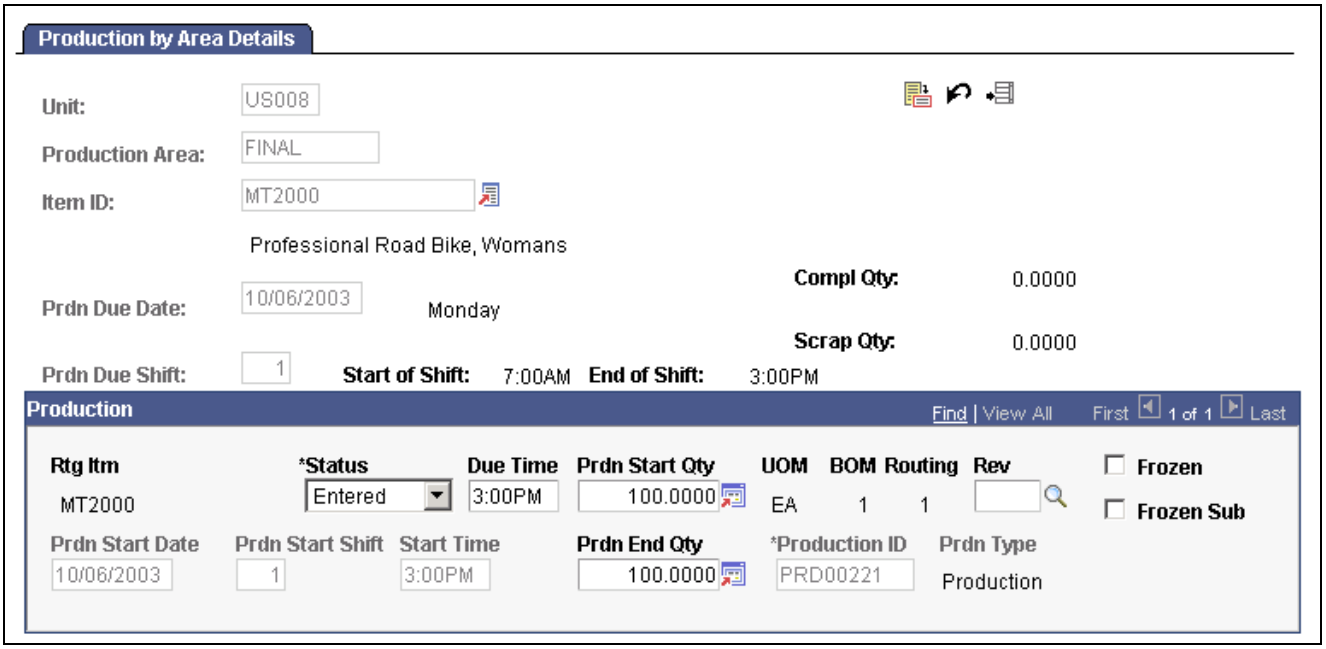
Defining and Viewing Production Details

Access the Production by Area Details page.



Production by Area Details page

Prdn Due Date (production due date), **Prdn Due Shift** (production due shift), **Item ID, Prdn Start Date,** (production 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)

Displays the number of assemblies that have been scrapped in process.

Click the Insert button to add new production quantities.

Each quantity that you add on the Production by Area Details page has the same business unit, production area, item ID, routing, routing item, and production due date. The system calculates the total production quantity for the production due date or on the Production by Area Summary page.

You can only add production in the *Entered, Firmed,* and *Released* statuses, and you can delete *Entered, Firmed,* and *Released* schedules.

Rtg Itm (routing item)

Displays the referenced item's routing. The end item can either have its own unique routing or reference another item's routing.

Due Time

The actual due date and time when production should be completed for the given production due date and production due shift.

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Prdn Start Qty (production start quantity) Displays the beginning quantity at the *first operation* of the manufacturing process. The system will adjust this quantity to account for any operation yield.

Prdn End Qty (production end quantity) Displays the quantity *expected* 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
Firmed or *Released*	The system recalculates the component scheduled quantities taking into account any operation yield.
In Process and you increase or decrease the production start or production end quantity	The 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	The 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 238

Viewing the Production Output List

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 assembly or per order.

Note. You cannot change or add primary or co-products. However, you can change or add recycle and waste by-products.

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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 affects completions.

Note. Because production is always backward scheduled using these pages, the 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**

These fields indicate the actual date, shift, and time when production should begin, as follows:

- If a routing is not 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 does not 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 the WIP as an end item is manufactured on 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 is produced on the shop floor.

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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

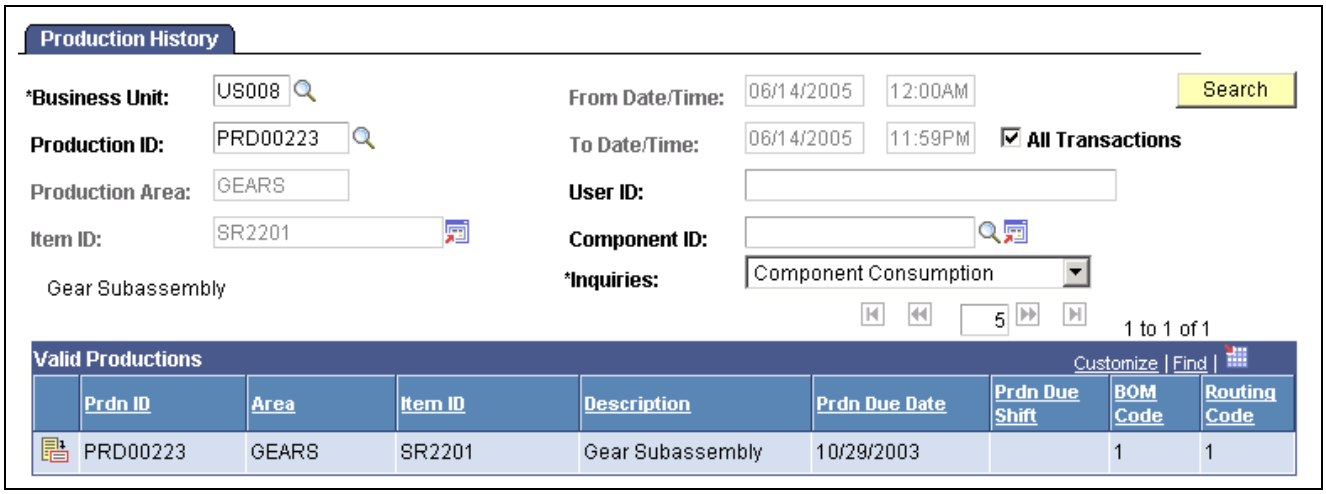
Click the Item Search button to access the Item Search link to select a different item.

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	SF_TXN_HIST_SP	Production Control, Define Production, Review Production Information, Production History Click the Details button.	View production history details based on the selection criteria.

Viewing Production Transaction History Details

Access the Production History page.



Production History page

The type of production information that appears depends on the selection of inquiry values on the Production History page. You can view production transaction history for:

- Completions detail
- Component consumption
- Operation detail

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Selection Criteria Options

There are several ways to view production information using the Production History page. Narrow the selection by entering a From date and time and To date and time range with any of these options. For example, to view a production ID for a specific date range, enter a beginning date and an ending date.

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 access the Production History Details page.

Production Area — Select *all* production based on the production area. This includes both production IDs and production schedules for all items.

Item ID — Select all production schedules for a particular item in the area specified.

User ID — Select production recorded by a specific user.

Component ID — View all production that uses this specific component. This field is only available when you select *Component Consumption.* 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 the selection criteria.

Rescheduling Production

Reschedule selected production IDs or production schedules with a status of *Entered, Firmed, Released,* or *In Process.*

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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. **Note.** 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. **Note.** 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 production ID or schedule, for a range of production IDs, production schedules, or for all production types by selecting both check boxes.

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Check Subcontracted Operations	Select to have the system to include production IDs with subcontracted operations.
Run	Click to run the Reschedule Production process at user-defined intervals.

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CHAPTER 19

Maintaining Component Lists

This chapter provides an overview of component lists and discusses how to maintain component list information.

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 bill of material (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 comprises 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 appear 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.

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- 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 *Firmed* during the completions and scrap reporting process, the system prompts to release the production and creates the component list. The ability to release production during the completion process is dependent on the 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 that you record operation 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 that 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.

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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:

[(operation start quantity x quantity per assembly) / 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 is calculated the same as when a production ID is created (operation start qty * qty per assy)/component yield.

If you're changing the scheduled quantity, then the system calculates the quantity per assembly: QPA = (current component scheduled qty * component yield) /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 is recalculated using the operation start quantity at the operation sequence where the component is required.

See Also

Chapter 8, "Maintaining Bills of Material," page 89

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; you can override it 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.

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Creating Component Lists for Teardown Production

PeopleSoft Manufacturing creates the component list for teardown production by copying the item that 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; you can override it 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 Enterprise Integration Point (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 51

Chapter 18, "Maintaining Production Orders and Production Schedules," Manufacturing Execution System Integration, page 325

Common Elements Used in This Chapter

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 appears if the end item is a configured item.

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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: *Production, Rework,* or *Teardown.*
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 % (expected yield percentage)	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 *Make, Buy, Expensed,* or *Floor Stock.*

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.

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Pages Used to Maintain Component List Information

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 *Firmed, Released,* or *In Process*. Define at least one production ID or production schedule with a production status of *Firmed, Released,*or *In Process.*
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 *Firmed, Released,*or *In Process.*
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.	Display or change substitute items selected by PeopleSoft Supply Planning, based on the criteria that 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.

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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 the components. Any component attachments from the BOM, and not associated with phantom items, are copied along with the components at the time that 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.

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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 (components where used selection)	SF_COMPWUSE_INQ	Production Control, Define Production, Review Production Information, Component Where Used in Prdn	Select the components that 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 606

Defining Component Selection Criteria

Access the Update Component List - Production Selection page.

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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, where you can retrieve specific components.

Date Type

Prdn Start (production start) and **Prdn Start Date** (production start date) Select Prdn Start to view the production schedules that 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 that 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 that 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 appears 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.

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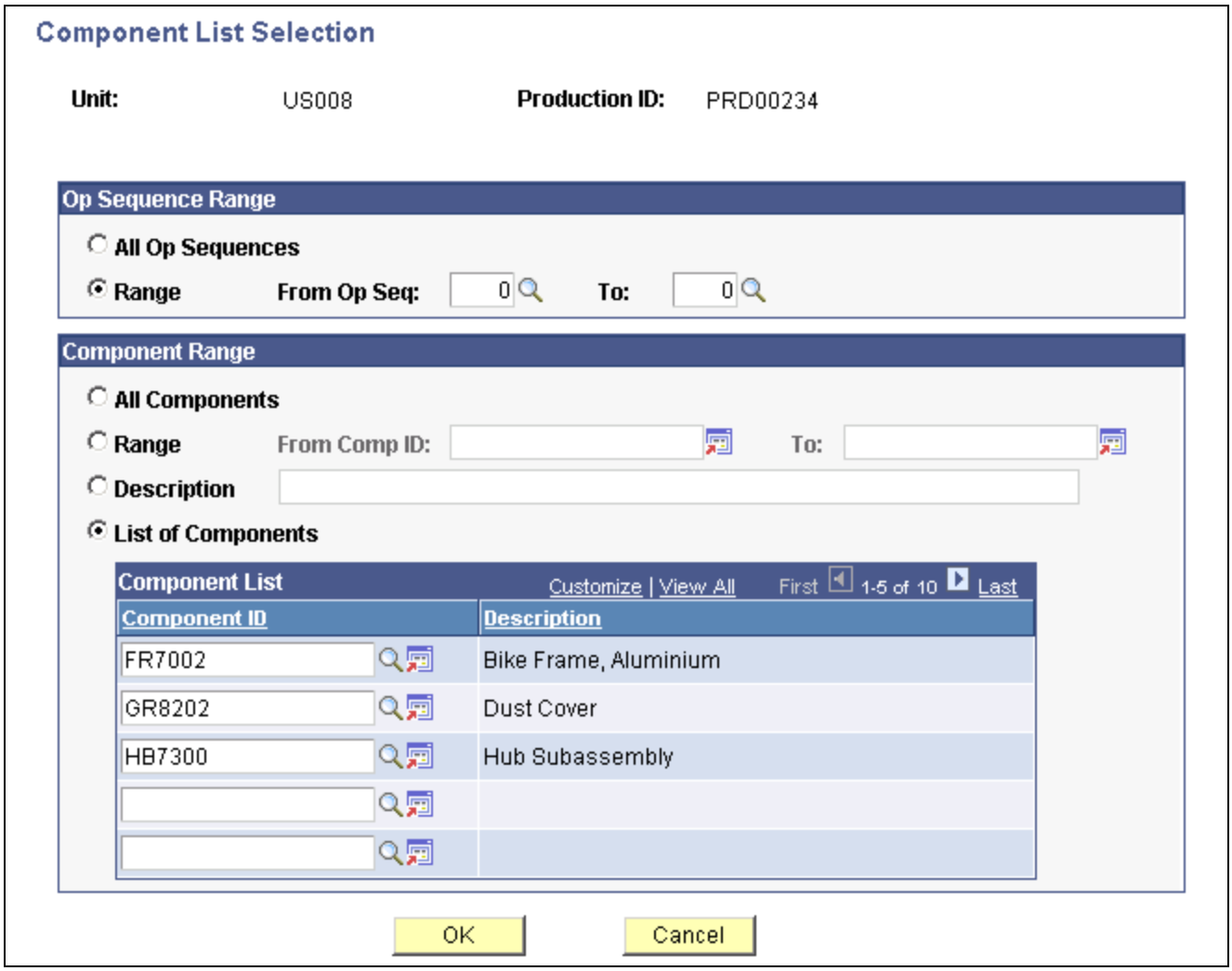

Component List Selection page

Op Sequence Range

All Op Sequences (all operation 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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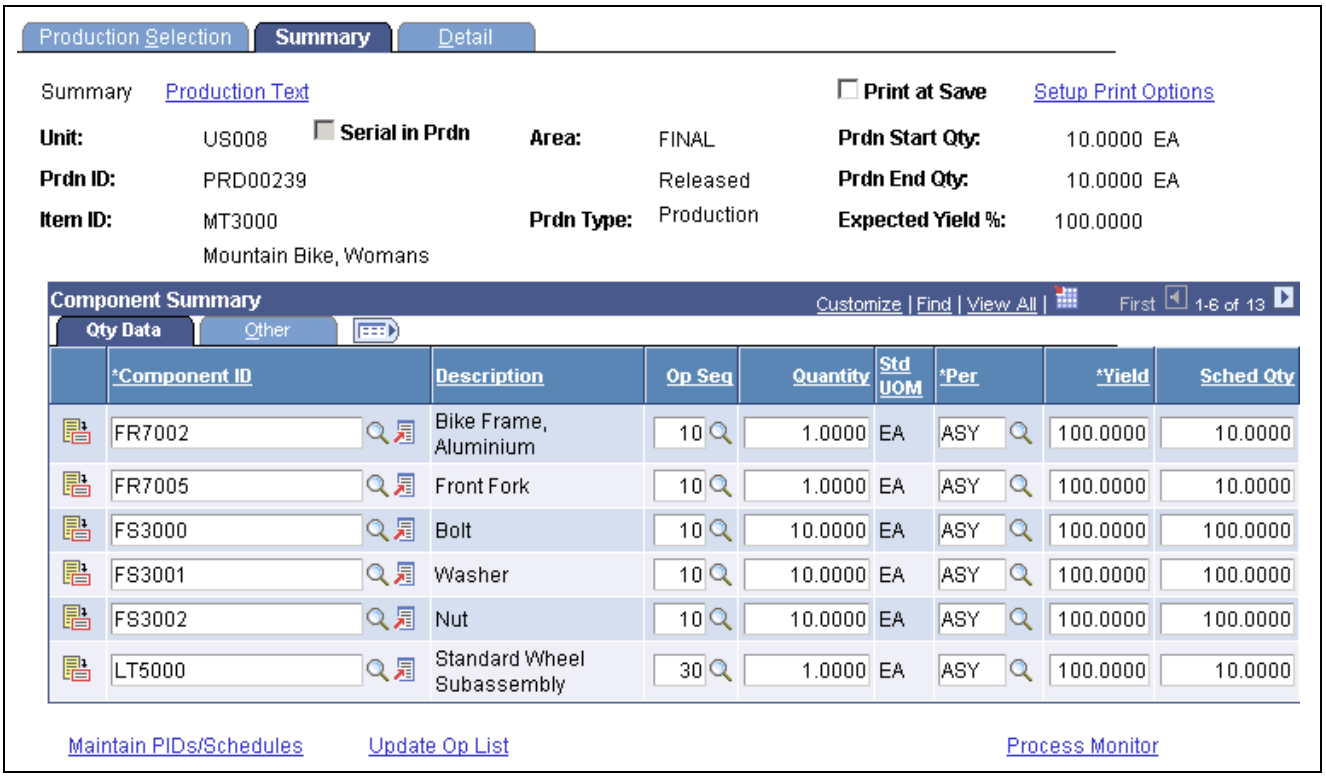
Note. You can use both the Op Sequence Range and Component Range options to further filter the selection criteria.

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.



Update Component List - Summary: Summary page: Qty Data tab

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 the component being added.

Item Search Click to search for the item ID using various search criteria.

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

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	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	Enter the number of components required based on per assembly or per order.
Per	Displays the component requirements in amounts per *Asy* (assembly) with a unit of 1, or per *Ord* (order), an amount regardless of the order size.
Yield	Displays the 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)	Enter the number of components required for the batch production. To calculate the scheduled quantity with a known quantity per assembly: Scheduled Quantity = operation start quantity * [Quantity Per Assembly / (Component Yield / 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:

  Quantity Per Assembly = [(Scheduled Quantity / operation start quantity) x (Component Yield / 100)] + .00005*

  *.00005 is used for rounding

- To calculate the quantity per order with a known scheduled quantity:

  Quantity Per Order = 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 is 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:

  Scheduled Quantity = Production Start Quantity x [Quantity Per Assembly / (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:

  Scheduled Quantity = Quantity Per Order

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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.

Other tab

Op Seq (operation sequence) Enter the operation step where the component is to be added.

Qty on Hand (quantity on hand) The system displays the total, available quantity on hand for the component.

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 the 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 only 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 that 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 assumes that 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 issues the components to the production area's WIP location. Owned components are issued only to owned WIP locations. Likewise, non-owned components are issued only to non-owned WIP locations.

Serial Control

The Serial Controlcheck 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 are considered the outputs from the teardown production.

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Substitute

The Substitute check box designates that a substitution has already taken place. This value is copied from the Component List Substitution detail page.

MES and Component Lists

When you modify a component list, if 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

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 604

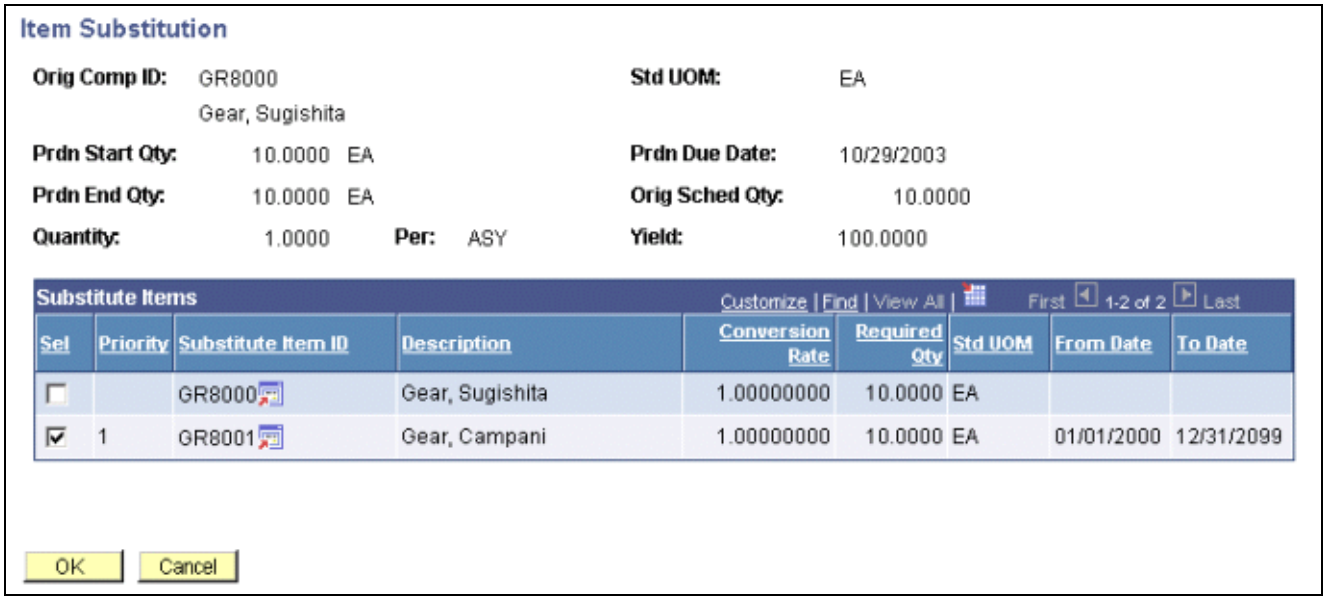
Chapter 18, "Maintaining Production Orders and Production Schedules," page 311

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Working with Items," Managing Inventory by Item Status

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Understanding the Flow Production Process"

Making Item Substitutions

Access the Item Substitution page.



Component List Item Substitution page

Substitute Items Displays the original component and a list of valid substitutes for the original component. PeopleSoft Supply Planning selects the component based on the criteria that you selected.

Sel (select) Select this check box to manually override the Supply Planning component selection.

OK Click to return to the component list Summary page where the substitution selection appears.

Substitute Indicates if the component is a substitute.

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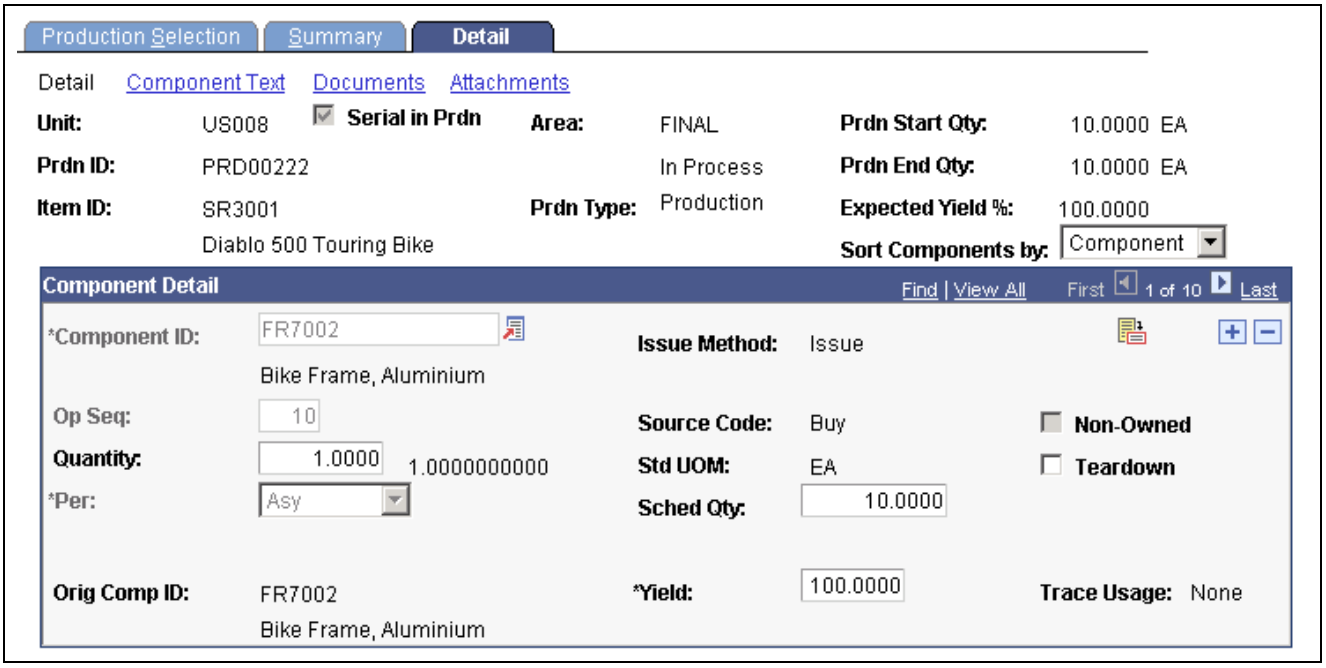
Orig Comp ID (original component ID) and **Description**

The values are display only. A difference between the component ID and original component ID indicates that a substitution has taken place.

Maintaining Component Detail

Access the Update Component List - Detail: Detail page.



Update Component List - Detail: Detail page

Component Details

Summarizes the activity of the component for the production ID or production schedule.

Orig Comp ID (original component ID)

Displays the original component ID, if this component is a substitute, as well as the issue method for the component. There are several component issue methods: *Production Issue, Production Kit,* and *Production Replenishment.*

Source Cd (source code)

Values are *Make, Buy, Expenses,*or *Floor Stock.*

Sched Qty (current scheduled quantity) and **Yield**

Fields are display only, but you can change this information.

Quantity

Displays the calculated quantity per assembly or per order. The system calculates the quantity per by dividing the quantity per assembly by the BOM's BOM quantity. You designate the level of precision for the calculated quantity per in the manufacturing installation options page.

Config Code (configuration code)

Displays a code 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, values in the Quantity Per and Scheduled Quantity fields must be whole numbers.

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Non-Owned Item Indicates that the component is supplied by the 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 Enterprise Product Configurator 9.0 PeopleBook, "Working With Configuration Codes"

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Managing Consigned Purchases Inventory"

Viewing Component Status Information

Access the Component Details page.

Pending Issue Qty (pending issue quantity) Displays 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) Displays the quantity that was scrapped during the end item process and consumed from the WIP location.

Issue Qty (issue quantity) For components using the *Issue* or *Replenishment* material issue method, this is the quantity that was consumed from the WIP location for the component and that was charged to work in process. For components using the Kit method, this is the quantity issued directly to the production ID.

Pending Yield Loss Qty (pending yield loss quantity) Displays the quantity of components that was scrapped during the end item process but that has not yet been consumed from the WIP location due to material shortages.

Pending Pick Quantity Displays 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.

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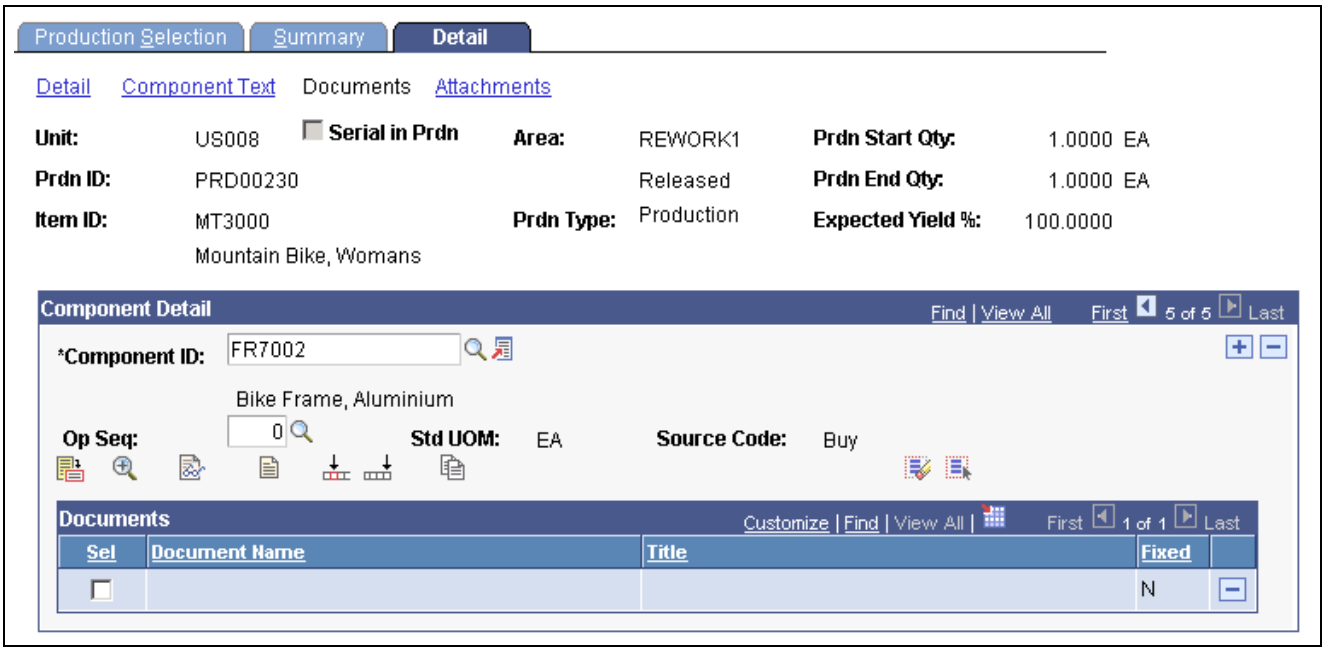


Update Component List - Detail: Documents page

Note. You must have PeopleSoft Engineering installed before you can access this page.

Using the Documentum Component Options page, you control the document management buttons that appear on 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.

Click to view document detail.

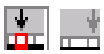
Click to query the Documentum database.

Click to view document contents.

Click to launch Documentum.

Click to edit documents in the Documentum database.

Click the Checkout button to check out documents from the vault. Click the Checkin button to check in documents from the vault. Click the Cancel the Checkout/Checkin button to cancel these operations.



Click the Fix/Unfix Versions to change versions.

Click to copy links.

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See Also

PeopleSoft Enterprise Engineering 9.0 PeopleBook, "Managing Documents"

Specifying Component Attachments

Access the Detail - Attachments page.

Component ID and Op Seq (component ID and operation sequence)	Enter values that you want to associate with the component.
File Ext (file extension)	Select the type of media that 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 appears 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.

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CHAPTER 20

Maintaining Operation Lists

This chapter provides an overview of operation lists and discusses how to maintain operation list information.

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 have not 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 221

Creating Operation Lists

You can create an operation list for regular production by:

- Accepting planning messages and converting planned orders into firmed or released production IDs or production schedules.
- Changing the production status from Entered to Firmed or Released.

  When production has a status of *Firmed* 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.

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When you specify a production ID that has a status of *Entered* or *Firmed* during the completions and scrap reporting process, upon request, the system releases the production, and creates the operation list for production with a status of Entered production. Releasing production IDs when recording completions and scrap is dependent on how you've set up the PeopleSoft Manufacturing business unit options. You can only record completions for a production schedule with a status of Firmed or Released. If the production schedule is Entered, you must change the status to Firmed 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 do not 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 the 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 that 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 is not 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 component. You may add, delete or change operations if end item completions, scrap, or earning of setup costs have not 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 and times, PeopleSoft Manufacturing displays a warning message indicating that the operation or production is frozen. You have the option to continue or cancel the 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.

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See Also

Chapter 13, “Maintaining Tasks,” page 209

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

Considering Subcontracted Operations

If you use outside vendors to perform an operation, set up and maintain the 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 do not select a preferred vendor, PeopleSoft Purchasing uses autosourcing to determine the vendor.

If you’re creating or maintaining a subcontracted operation, note 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 that the routing is copied to production during the release process.
- You can specify only labor planning and costing operation times.
- You cannot generate multiple outputs such as co-products or by-products at subcontracted operations.

See Also

Chapter 14, “Structuring Routings,” Defining Routing Header Information, page 227

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 appears 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. Values are *Forward* and *Backward.*
Prdn Type (production type)	Type of production being manufactured. Values are *Production, Rework,* and *Teardown.*

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Prdn Start Qty (production start 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 *beginning* 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 *ending* production quantity.
Source Cd (source code)	Code indicates if the production is *Make* or *Buy.*
Routing Code	Routing code associated with the selected production.
Rtg Item (routing item)	Item on which the referenced item's routing is based.
Frozen	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 tasks are performed.
Operation Start Date	Date the operation step is or was due to begin.
Start Time	Time the operation step is or was due to begin.
Operation Due Date	Date the operation step is or was due to be completed.
Due Time	Time the operation step is or 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.
- View operation list summary information.

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Pages Used to Maintain Operation List Information

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 *Firmed* 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.
Details - 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 postproduction times and 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.
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.

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Page Name	Object Name	Navigation	Usage
Details - 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.
Details - 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.

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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 Select a 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 production start date.

Prdn Due (production due) Select this option if you want to view production schedules based on the production due date.

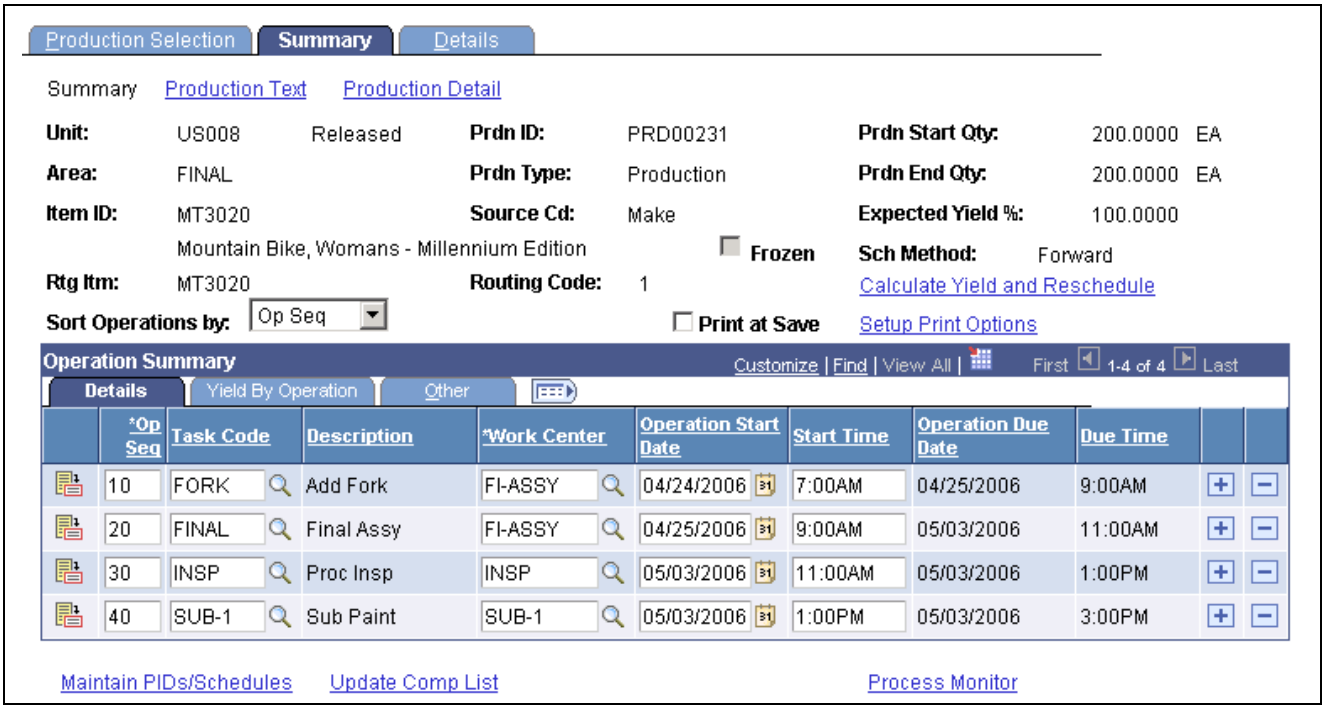
Prdn Due Shift (production due shift) Select a valid production shift.

Note. If multiple production schedules exist for the production area, item, date, or shift, then a warning appears followed by a listing of the production schedules from which you can select one production schedule to maintain.

Search Click this button to retrieve the information associated with the selected production.

Maintaining the Operation Summary

Access the Summary - Summary page.



Update Operation List — Summary: Summary page

Sort Operations by Select *End Date, Op Seq* (operation sequence), or *Start Date.*

Print at Save Select this check box if you want to print production documents at save time for a particular production ID.

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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

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 cannot delete an operation from the operation list once completions or scrap have been recorded for the operation.

Note. You cannot 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 they 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 and **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, change only the due time because all production schedules are backward scheduled. The scheduling method of the production ID or production schedule appears in the Operation Summary header.

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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.

Calculate Yield and Reschedule

Click this link to see the impact of a date or 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 production ID or production schedule start date or time appears by default, even when the production ID is backward scheduled. If the production is backward scheduled, the system automatically recalculates the start date or time once you enter the due date or time.

If you change the work center for an operation and the current start date or time or due date or time does not fall within the hours of operation for the work center, the system reschedules the date or time to a valid date or time once you click the Calculate Yield and Reschedule link. Valid dates or 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 runtime production calendar. If one is not 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 and times when you create or maintain an operation using PeopleSoft Manufacturing, and then optimize the operation's start and due dates and times using PeopleSoft Supply Planning.

Important! Change operation list dates one at a time. When one of the dates is changed, the remaining date and time fields are unavailable. To change multiple operations, select the first operation to be changed, enter the changes, and then click the Reschedule button. Once the system reschedules all operations, select the next operation to be changed and continue.

Save

Click this button before exiting the page to save the results of the recalculation.

Yield By Operation Tab

Yield %

Displays the percent that you expect at this operation sequence. The default value is defined on the routing, which is used on the production ID, but you

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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 the scrap process has been performed against the production ID.

Assy Starts Qty (assembly starts quantity) Displays 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) Displays the quantity that you expect to complete at the end of the operation. This amount will account for any operation yield loss during the production process

Other

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 cannot change the work center or task from a work center or task that is subcontracted to one that is not, once a purchase order for the subcontracted work has been created.
- You cannot 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 cannot 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 the 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 will not automatically freeze an operation if you've recorded material

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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 do not 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 with 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

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 604

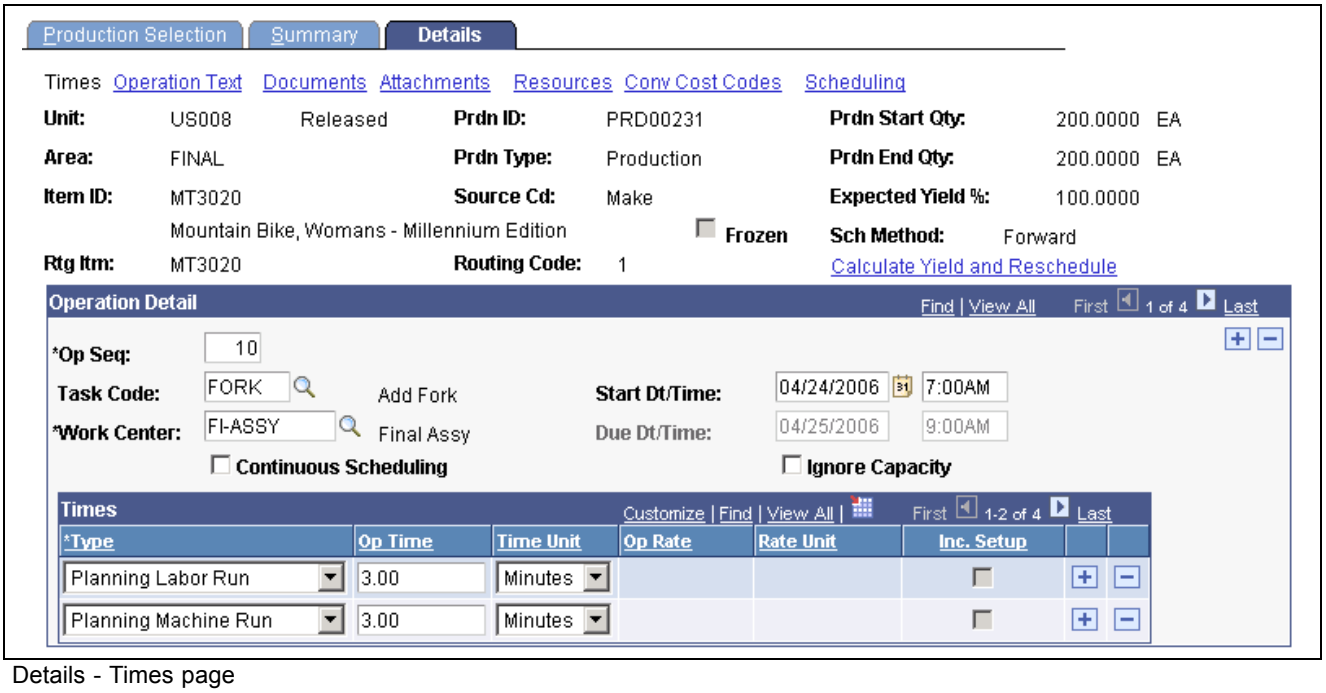
Chapter 13, "Maintaining Tasks," page 209

Chapter 12, "Defining Work Centers," page 193

Chapter 23, "Completing Operations and Recording Scrap," Recording End Item Completions Using Count Points, page 474

Maintaining Operation Times

Access the Details - Times page.



Details - Times page

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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 appear by 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 have not 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.

Calculate Yield and Reschedule

To change the work center, task, or operation sequence, click this link to update the schedule.

To save the results of the recalculation, click the Save button before exiting the page.

Operation Type (operation times or run rates)

These values appear by 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 cannot select machine times or rates for the operation.

Op Time (operation time) and **Op Rate** (operation rate)

You can modify these values. Use operation rates for runtimes only:

- If you enter an operation time, you can enter *Days,Hours,* or *Minutes* in 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 enter *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 runtimes.

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

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types. The check box is not 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 is not selected, setup can physically begin prior to any production units arriving at the work center. However, the system calculates the start date and time of the operation to reflect the latest time the setup should begin to meet its due date and 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 particular item, operation, or 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 runtime 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 do not specify a costing time, the system will not 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.

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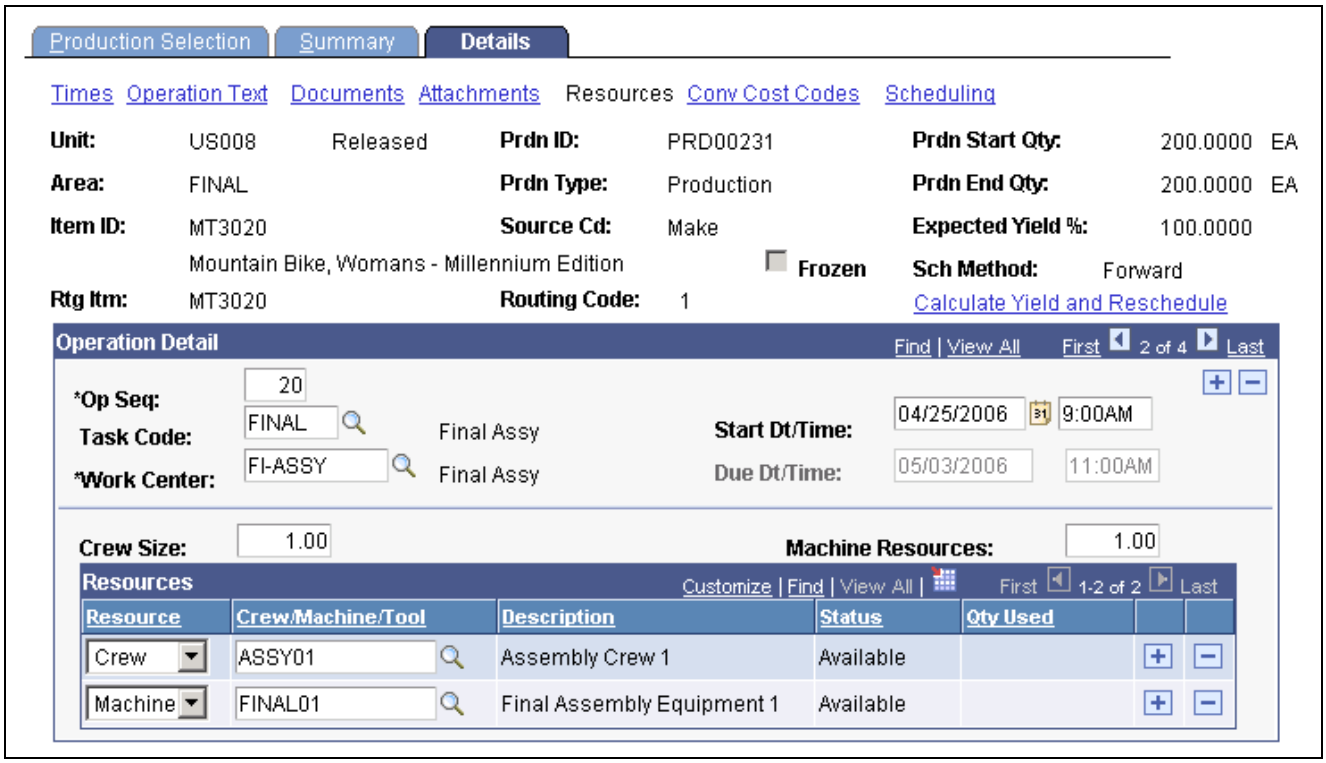

Details - Resources page

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 appear by 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. 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 appear by default from the work center. Crew size is the number of people at the work center. The Machine Resources field displays 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.

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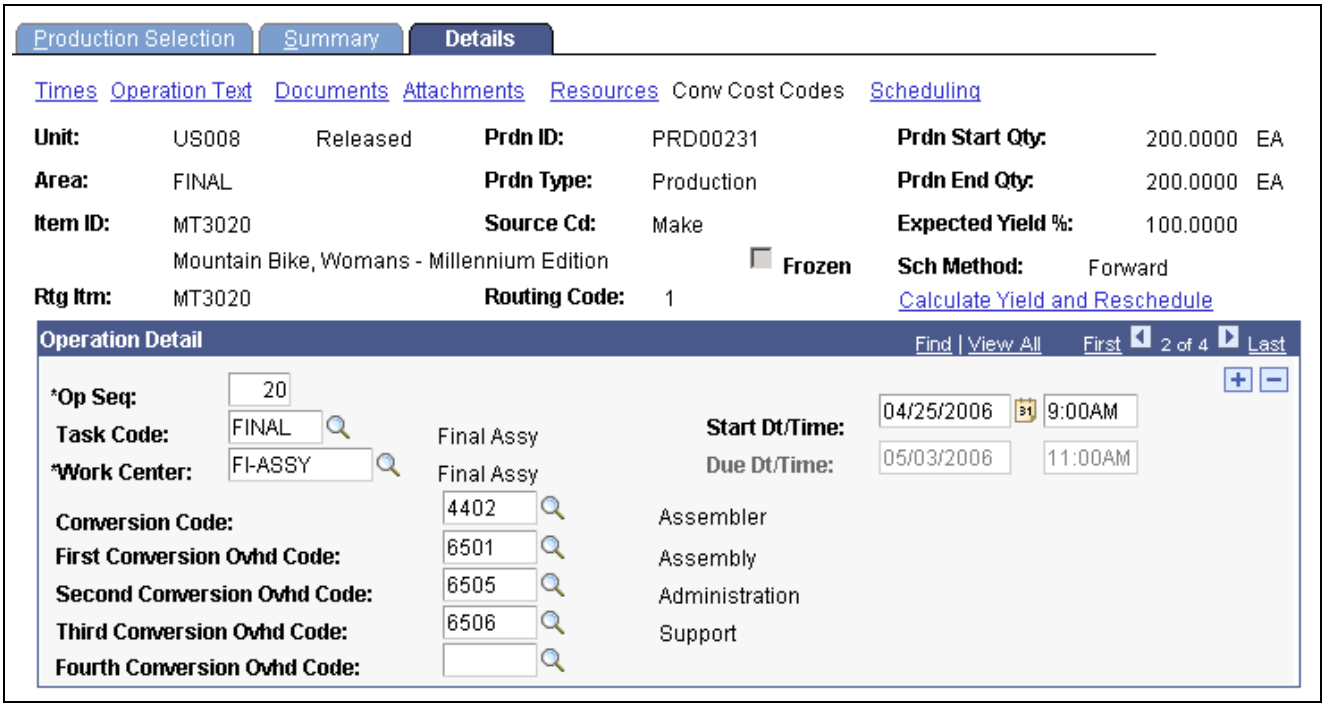
For each operation, the resource information appears by default from the resources associated with the work center that you assigned to the task, and therefore the operation. Only the primary crew, machine, and tools are copied to the operation list. You can enter additional resources (crews, machines, and tools) by selecting a resource type and the specific crew, machine, or tool. The resource's description, status, and, when the resource is a tool, quantity used appears. 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.



Details - Conv Cost Codes page

Conversion cost codes determine the labor, machine, outside processing, and overhead cost of the operation. When defining the 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

Displays the associated values with the operation's work center 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.

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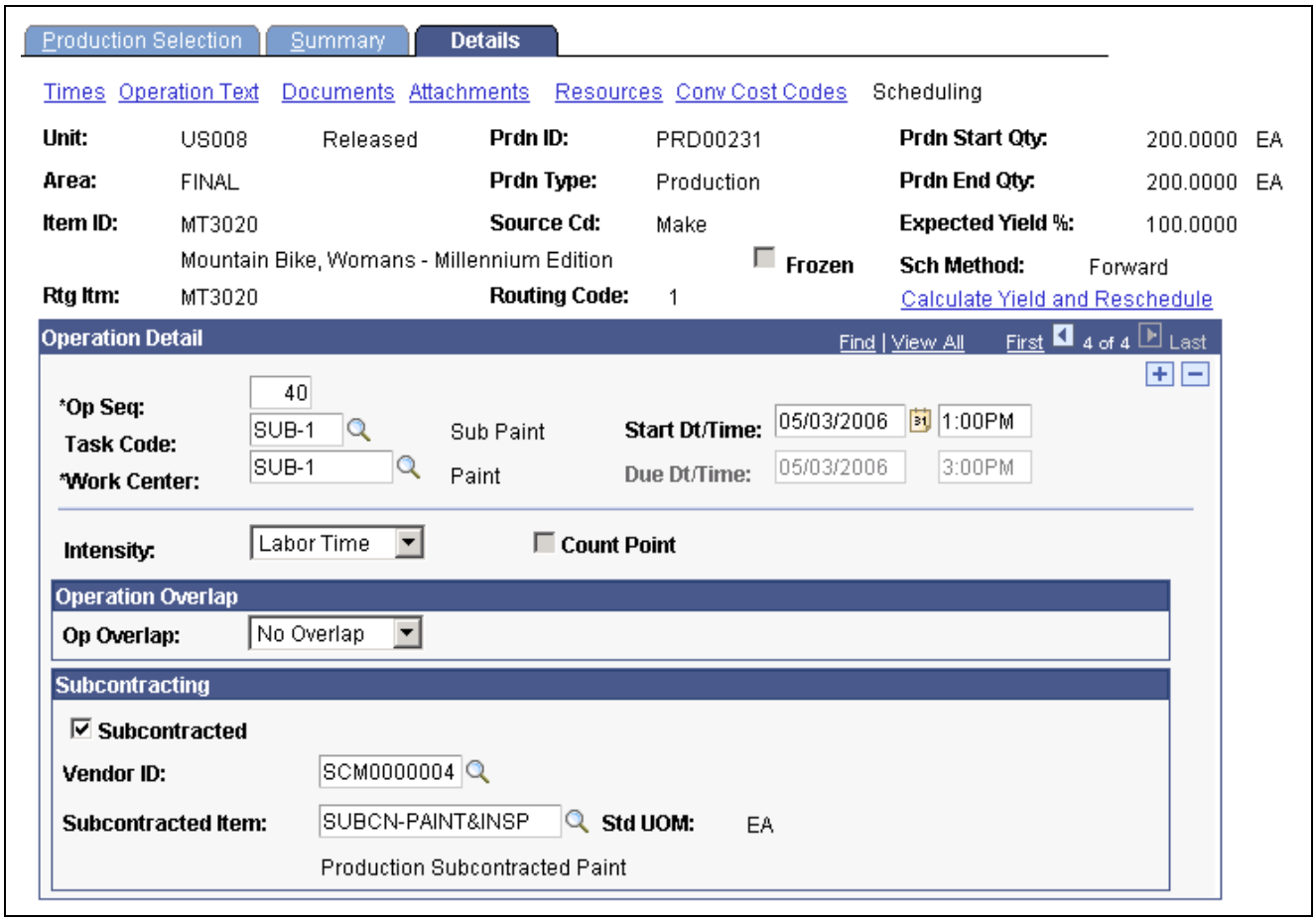
Note. If you change the conversion code or the conversion overhead codes, and the rates associated with the new codes differ from the old ones, the change results in cost variances for the production ID or production schedule quantity.

Maintaining Operation Scheduling

Access the Details - Scheduling page.



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 is not available if the page is displaying the first operation in a routing, if setup is not included for the operation, or if you're using PeopleSoft Supply Planning.

Count Point

This option is selected if the operation sequence is a count point. This field is display-only and appears by default from the Summary page. Count points

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enable 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'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 the changes. If you proceed with changing this information, the operation is no longer frozen.

Intensity This value appears by default from the task and determines the basis of the 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, fixed run, or all three.

Op Overlap (operation overlap) Values include:

- *No Overlap:* No operation overlap.
- *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 percent means that the next operation can start at the same time as the current operation. An overlap percentage of 5 percent means that 95 percent of the operation must be completed before the next can start. Operation overlap cannot be less than 0 or more than 100 percent, 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 enter only whole numbers. If you enter an incorrect number format, you'll receive an error message.

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The default setting for Op Overlap is *No Overlap.* If you select No Overlap, the Send Ahead and Overlap % fields are not available.

Important! If an operation has a fixed run rate assigned to it, the preceding operation cannot 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 cannot have a send ahead quantity assigned if operation 2 has a fixed runtime.

Subcontracted This option is selected if the operation is being performed by a vendor. You cannot clear this check box if purchase orders have been created for this outside vendor.

Vendor ID If the subcontracted vendor was defined at the task level, then the name of the vendor appears in this field. Otherwise, you can select the appropriate vendor for this subcontracted operation.

Subcontracted Item If this value was defined at the routing level, then the item appears in this field. You can change the value in this field.

Note. The subcontracted item will be used on any subcontracted purchase orders that are created for this operation.

Note. The UOM for the subcontracted item and the end item must be identical.

Viewing 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 Displays 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) Displays the quantity completed at the operation. This quantity does not include any scrapped assemblies.

Qty Scrapped (quantity scrapped) Displays the total number of assemblies scrapped at the operation.

Scr Pct (scrap percentage) Displays a weighted average of the scrap percent complete specified when recording end item completions and scrap. This percentage represents the amount of runtime earned and scrapped for the particular operation.

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CHAPTER 21

Releasing Production and Changing Production Statuses

This chapter provides an overview of releasing production and changing production statuses, and discusses how to:

- Change production ID statuses.
- Change production schedule 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 you can 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 item. When you change an order's status, there may be significant consequences.

If you change the status to *Released* and you integrate with a third-party manufacturing execution system (MES), PeopleSoft Manufacturing uses the Production Order Update enterprise integration point (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:

- Release of production.
- Reversal of production statuses.

Release of 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 that 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:

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- 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 the 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 before 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 before 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 before 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 you can release 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 work-in-progress (WIP) locations and are not 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 the environment when setting up the PeopleSoft Manufacturing business unit options.

See Also

Chapter 19, "Maintaining Component Lists," page 371

Chapter 20, "Maintaining Operation Lists," page 389

Reversal of Production Statuses

Besides releasing production, you can also use the Production ID Status Change page and the 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

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- Pending loss quantities
- Operation completions
- Co-product and by-product 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. Values are *Production, Rework,* and *Teardown.*
Prdn Start Date/Shift (production start date/shift)	Actual production start date and shift that production is or was to begin for the production schedule.
Prdn Due Date/Shift (production due date/shift)	Actual production due date and time that production is or was to be completed for the production schedule.
Start Date/Time and **Due Date/Time**	Actual production start date and time and due date and 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 that the end item uses. The end item can use its own routing or the routing designated for its family or item group.
Config Code (configuration code)	Code that is displayed 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 used when producing the item.

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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 Change Production ID Statuses

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 this page to change the status of a production ID from *Entered* or *Firmed* to *Released*. You can also use this page to change a production ID from *In Process* to a prior status. **Note.** 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. **Note.** Define at least one production ID or production schedule with a status of *Entered* or *Firmed.*
Production Selection	SF_PRDN_RELSE_REQ2	Production Control, Process Production, Release Production, Request Prdn Status Change, Production Selection	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	Generate a dispatch list. **Note.** Define at least one 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 selected production IDs. **Note.** Define at least one production ID.

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Page Name	Object Name	Navigation	Usage
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. **Note.** Production IDs must have a production status of either *Released* or *In Process*.
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 602

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 604

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 cannot 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 it updates the status.

If you change the status of a released production ID and you integrate with 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 8, "Maintaining Bills of Material," page 89

Chapter 18, "Maintaining Production Orders and Production Schedules," page 311

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Changing Production Schedule Statuses

This section discusses how to:

- Change production schedule statuses.
- Change production statuses and release multiple production IDs and schedules.
- Define additional production status change and release criteria.

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Pages Used to Change Production Schedule Statuses

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 *Entered* or *Firmed* to *Released.* If you do not release the schedule as you're adding it, you can release it here. Change a production schedule from *In Process* to a prior status. **Note.** You must define at least one production schedule.
Dispatch List Selection	RUN_SFS2002	Production Control, Process Production, Release Production, Print Dispatch List, Dispatch List Selection	Generate a dispatch list. **Note.** Define at least one 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. **Note.** Production schedules must have a production status of either *Released* or *In Process.*
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 602

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 604

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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 on 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 it updates 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 cannot be manually maintained.

When you change the status of a released production schedule, if 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.

Changing Production Statuses and Releasing Multiple Production IDs and Schedules Simultaneously

This section discusses how to:

- Define production status change information to be changed and release the production simultaneously.
- Define additional production status change and release criteria.

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Pages Used to Change Production Statuses and Releasing Multiple Production IDs and Schedules Simultaneously

Page Name	Object Name	Navigation	Usage
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. **Note.** Define at least one production ID or production schedule with a status of *Entered* or *Firmed.*
Production Selection	SF_PRDN_RELSE_REQ2	Production Control, Process Production, Release Production, Request Prdn Status Change, Production Selection	Define additional production status change and release criteria.

Changing Production Statuses and Releasing Multiple Production IDs and Schedules Simultaneously

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 the 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 cannot use the Production Status Change process to reverse orders and change them to prior statuses. Use the Production ID Status Change page or the 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 one day from the current system date and three days into the future, enter *1* in the beginning field and *3* in the to field.

Note. Any production considered to be past due is 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.

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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 the 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 production IDs by indicating 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:

- 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 process (SFPARELS) at user-defined intervals.

Manufacturing Execution System

When you perform this transaction changing production order statuses, if 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.

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CHAPTER 22

Issuing Material to Production

This chapter provides an overview of component issue methods and discusses how to:

- Use the Issue method.
- Use the Kit method.
- Use the Replenishment method.
- Create and process picking plans.
- Replenish WIP locations.
- Process kit issues and returns.
- Process component de-kits.
- Issue material using electronic data collection.
- Process picking plans using electronic data collection.
- Process kit issues and returns using electronic data collection.

Understanding Component Issue Methods

After releasing production, you need the proper components to manufacture the item on the shop floor. There are several ways to make sure that the materials are 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 component items. In some instances, you may want only a fixed quantity located on the shop floor, especially when space is limited. In addition, there may be some items that do not 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 and end item level. Define the issue method by selecting one of these options:

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

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is issued using the kit method. The system issues any additional components required for rework or teardown production using the issue method set for each item at the production area and item level. This issue method appears automatically from the Define Business Unit Item - Manufacturing page, and it 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 the issue method is replenish, you can also replenish the 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 option, you can issue some of the components using the issue method, some using the kit method, and others using the replenishment method. In this case, you'll use the component's method that is defined on the Define Business Unit Item pages.

Note. Quantities of an item that are stored in a nettable, available WIP location and that are reserved for production use are not available for other purposes.

See Also

PeopleSoft Enterprise Flow Production 9.0 PeopleBook, "Understanding the Flow Production Process"

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Manufacturing Information for an Item

Chapter 17, "Setting Up Production Areas," Defining Production Area and Item Detail, page 307

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

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 item and description of the item being manufactured.

Prdn Type (production type) The type of production being processed. Values are *Production, Rework,* and *Teardown.*

Start Date The date the production is or was due to begin.

Due Date The date the production is or was due to be completed.

Component Issue Methods Options are *Issue, Kit,* or *Replenish.*

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Prdn Start Qty (production start quantity)	The quantity required at the beginning of the production process. This quantity is rounded up to account for any operation yield if the system calculates 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 is rounded down to account for any operation yield if the system calculates the production end quantity based on the production start quantity.
Serial in Prdn (serial in production)	A display-only check box that indicates if serial genealogy information is captured for the production ID.
Trace Usage	A field indicating whether serial or lot genealogy is 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 is captured. Values are *Serial, Lot,* and *None.*

See Also

Chapter 16, "Using Serial Genealogy in PeopleSoft Manufacturing," page 275

Using the Issue Method

Use this method to issue components for a defined period of production. When using the issue method, you generate a picking plan that specifies certain parameters for picking components. For example, you might have the system to recommend the location from which to pick the components, or you might want to view 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 current production.

Once you define how you want to pick the material, you use picking plans to translate requested stock into material picking instructions for stockroom processing. After 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 uses the existing on-hand inventory quantity in the WIP location. This logic includes 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. The logic also takes into account any operation yield. This ensures that excess material in the WIP location is always used before additional material is issued. In addition, PeopleSoft Manufacturing includes all production from the beginning 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 are not 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 display substitutions on the pick plan, the process verifies that 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 432

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Using the Kit Method

Use this method to issue components directly to production IDs for discrete production runs. When using the kit method, you 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 when excess material must be returned back to stock—use the Issue/Return Kit Components page. 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 and item level. This issue method appears automatically from the Define Business Unit Item - Manufacturing page, and it can be overridden on the Production Area - Item Detail page.

If you display substitutions on the pick plan, the process verifies that sufficient quantity on hand exists to pick the full, required quantity for the specified 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 Replenishment Method

To define storage locations, use the Storage Locations (STOR_LOCATIONS) component. To define storage area locations, use the Storage Areas (STORAGE_AREAS) component.

To define replenishment locations, use the Production Replenish Locations component (REPL_LOCATIONS). Use the REPL_LOCATIONS_CI component interface to load data into the tables for this component.

Use the replenishment method to stock components in the WIP locations at the work center where you use 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 use 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 that you manage by using the replenishment method. You must also specify the issue multiple that is used to replenish the WIP location. Define both of these parameters using the Define Business Unit items pages. If you use PeopleSoft Flow Production, you can also replenish the WIP locations directly from an inventory location, feeder line, or vendor using Kanban cards or online replenishment requests.

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Pages Used to Use the Replenishment Method

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 use PeopleSoft Flow Production. If you use PeopleSoft Manufacturing without PeopleSoft Flow Production, you can set up production replenishment defaults if you use the replenishment 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 use PeopleSoft Manufacturing without Flow Production, set up defaults if you use the replenishment component-issue method.

Defining Production Replenishment Locations

Access the Prdn Replenish Locations page.

WIP locations Select the storage location for the 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, and it uses the issue multiple that you specify on this page.

If you use 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 that you want stored at the WIP location and that is not associated with a specific order.

WIP RPL Source (WIP replenishment source) Select to specify where to send the PeopleSoft Flow Production replenishment request and which source supplies the WIP location. Options are:

- *Feeder:* A feeder line creates subassemblies that it feeds into the main production line.

  Once you have used a specified quantity of the subassemblies, you send a replenishment signal to start production on the feeder line.

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- *Inventory:* You replenish the WIP location directly from an inventory location.
- *Vendor:* You replenish the 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 do not use PeopleSoft Flow Production, these fields are unavailable. In that case, the system uses the default replenishment mode of *Backflush Controlled* and a replenishment method of *Workflow*.

Repl Max Qty (replenishment maximum quantity)

If you are using PeopleSoft Flow Production, this field is set to the maximum amount of the item that 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 *Manual* replenishment mode.

See Also

Chapter 22, "Issuing Material to Production," Defining Production Replenishment Locations, page 421

PeopleSoft Enterprise Flow Production 9.0 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 that 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)

Select to indicate how PeopleSoft Flow Production generates replenishment requests for the item. Options are:

- *Backflush Controlled:* You consume components from the WIP location while backflushing completions.

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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:* A visual indicator signifies 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 replenishment type to designate whether you want the Kanban card to be used one time or to be reusable. This field is available only if you select *Kanban Card* for the WIP replenishment mode.

WIP RPL Source (WIP replenishment source)

Select to specify where to send the PeopleSoft Flow Production replenishment request and which source supplies the 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 the WIP replenishment source, the WIP Production Area field becomes available. Select the WIP production area that serves as a feeder line for the item.

- *Inventory:* You replenish WIP location directly from an inventory location.

  If you select *Inventory* as the WIP replenishment source, the Source Location fields become available for entry. Select the source storage location that replenishes this item. The location field is not mandatory but, if completed, it must be a valid location. The storage levels that appear depend on the storage structure established on the Inventory Options Page.

- *Vendor:* Use vendor replenishment to replenish the WIP location by directly receiving purchased components from a vendor.

  If you have selected *Vendor* as the WIP replenishment source, the Vendor ID and Vendor Location fields become available. Select the vendor ID and vendor location that directly replenish this item. You can override this before dispatch if necessary.

WIP RPL Method (WIP replenishment method)

Select to designate how the PeopleSoft Flow Production replenishment request is communicated. You must select *Backflush* or *Manual* as the

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WIP replenishment mode to use WIP replenishment methods. The WIP replenishment method options are:

- *Workflow:* The system generates a worklist entry that links to the Production Replenishment worklist, and uses defaults for the item, quantity, and From and 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 that 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 The system determines the locations from which to pick each item, and it creates a hard reservation for the 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 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 that the picking plan is generated.

Note. Item quantities in WIP are not 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.

If you pick lot-controlled items and the lot is not 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 is not 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.

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If you use the PULL method, record the picked components and the storage area and location from which they were picked. If you use the PUSH method, confirm that the components were picked from the storage area and location recommended in the pick plan. You can simultaneously confirm the picking plan and release material to production. To automatically initiate the Material Release process, select Release at Save, confirm the pick plan, and then save the page. Alternatively, you can schedule the process by running the Update Pick Batch process. Confirm 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 Enterprise Inventory 9.0 PeopleBook, "Managing Item Lots," Establishing or Updating Control Parameters for a Specific Lot

Pages Used to Create and Process Picking 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.	Indicate that you want to print the extract file for bar codes, and 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.

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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 hidden, and it should be only be accessed by a system administrator. Once this page has been configured, 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 that you want to review. **Note.** 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. **Note.** 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. **Note.** 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.

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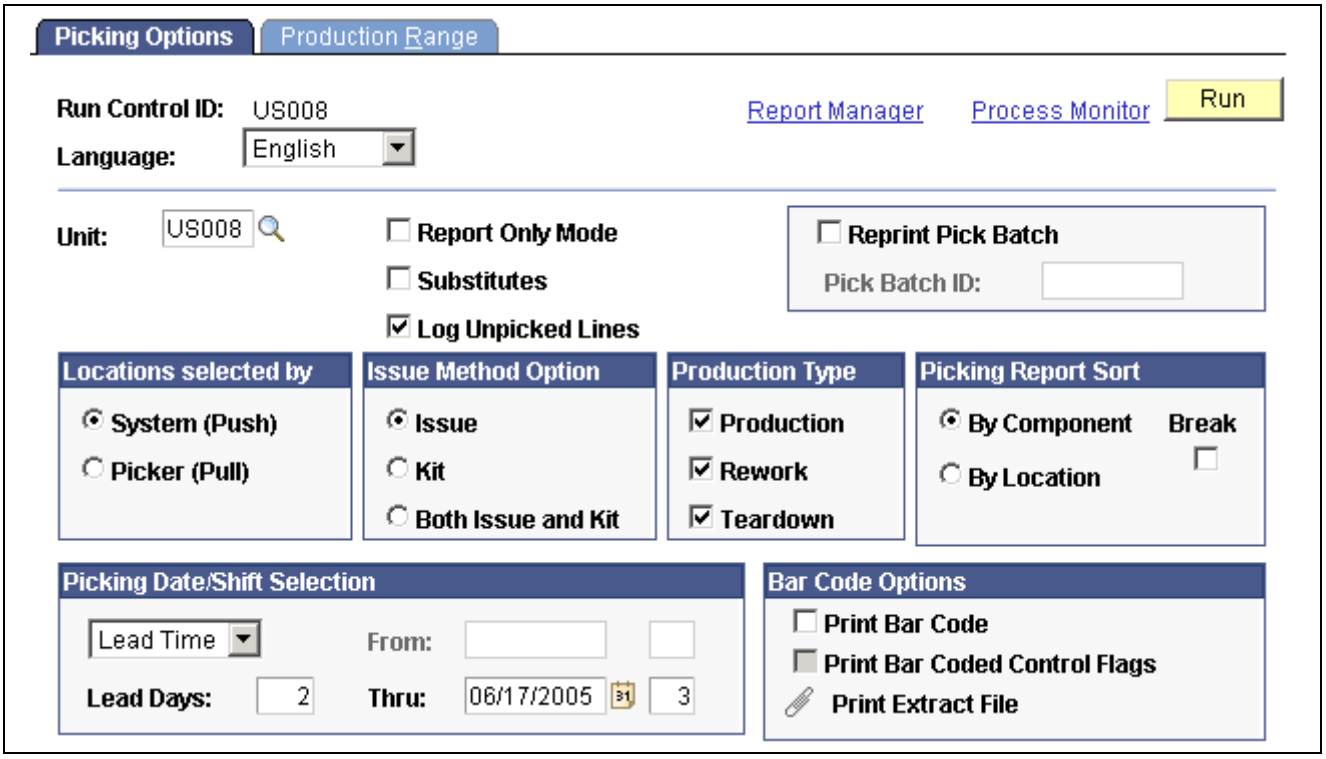
Page Name	Object Name	Navigation	Usage
Material Release	RUN_SFS6001	Production Control, Process Production, Issue Materials, Material Release	Issue material to the shop floor. Use this page if you selected the Do Not Release at Save option on the Review Plan page or if you did not select the two-step process in the Update Pick Batch component. **Note.** You must pick and confirm at least one pick plan.

Generating Picking Plans

Access the Picking Options page.



Picking Options page

Report Only Mode Select to preview the pick plan before running it. The system does not create material reservations in Report Only mode because it is an information-only report.

Substitutes Select to print substitutes on the pick plan.

However, if you do not 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, list substitutes, and then make the substitution on the component list before running the final pick plan.

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Note. Substitute items for rework and teardown end items do not appear.

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 appear on the pick plan. They are distinguished by a border around the substitute items.

Note. The pick plan does not perform automatic substitutions.

Reprint Pick Batch Select to reprint a previously printed pick batch.

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, do not select the Reprint Pick Batch check box.

System (Push) or **Picker** (Pull) Indicate whether the system uses one of the following methods to determine the locations from which is 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 use 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 from the following options: Issue, Kit, and Both Issue and Kit. Subsequent selection options depend on the issue method selected here.

Issue When this method is selected, components on production IDs or schedules whose issue method is set to Production Issue are picked. Because 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 includes all requirements through the selected date, even past due requirements when a date range is entered. It also checks requirements from production areas outside 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 0. The system then determines the required quantity of the component for the selected production. The system also reviews the quantity of in-process picking plans for the component and the WIP location.

The system then checks the WIP minimum quantity, which is defined at the item and location level. It defines the additional quantity to be issued over and above the demand for *Issue* components. If all requirements occur as

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planned—and no additional material is issued to the WIP location—the component should 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 is not printed on the pick plan.

Kit

When this method is selected, components on production IDs whose issue method is set to Production Kit are picked. Because these components are issued directly to a production ID and are not 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 does not print it on the pick plan.

Both Issue and Kit

This method assumes that 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. On 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 the item status of *Hold* for the 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 the picking plan by component, location, or production area. The production area option is available for only pull and push kits.

Break

Select 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 or Pull	Issue Method	By Component	By Location	By Production Area/ID
Push	Kit	Yes	Yes	Yes
Push	Issue, Both	Yes	Yes	No
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

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for all components associated with operations due to start within specified periods. Options are:

- *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* through *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* as the issue method, the From date field is unavailable. The pick plan automatically includes all requirements from the beginning 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 that you want to pick in the Lead Days field.

  The current date is considered one 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 are not used, 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 on the current day.

  When selected, the Thru date automatically appears as 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 automatically displays the current date and shift 3, regardless of what was entered and saved in a previous session.

Print Bar Code Select to have the system print bar codes for bar coded fields on the Pick List.

Print Bar Coded Control Flags Select to print bar code control flag information. Bar coded control flags are item attributes flags.

Note. PeopleSoft Inventory delivers printer settings for all Structured Query Report (SQR) output to a generic line printer. However, when printing bar coded information on reports, such as the Material Putaway Plan report and the Picking Plan report on a printer control language printer (for example, HP LaserJet), you must first define the printer type accordingly. You can do this by changing the printer type settings that PeopleSoft Inventory delivers in SETENV.SQC from LINEPRINTER to HPLASERJET.

If you use 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.

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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 that you choose 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 are not 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 checks 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 the selection by any of the four location levels set up in the inventory. If you selected a range of production areas, you cannot 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 that you want to process before a database update is performed.

If you do not want to do intermittent commits, then set the commit level to a higher number that is larger than the normal number of components that

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	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 that 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 must 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 the selection or as a way to view the pick plan.
Pick Batch ID	Enter the number associated with the batch. You can select the ID for the entire pick batch, or you can select 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 and production ID, or production schedule and 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 the PeopleSoft Inventory business unit to review a picking plan for a specific location.
Search	Click to retrieve the selected pick plan.

Reviewing the Pick Plan

Access the Review Plan page.

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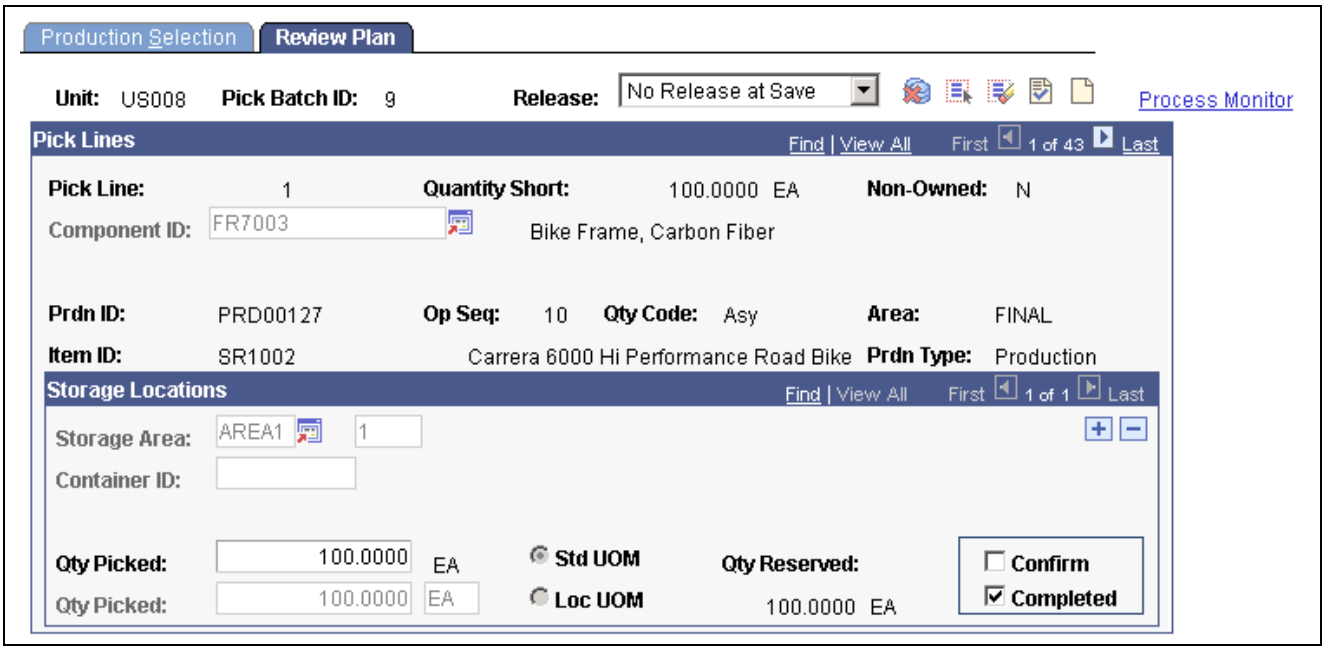

Review Plan page

Release

Select how you want the material release to occur. Options are:

- *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 click Save on 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.

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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 page or the 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 appears. You can modify the storage area, if you pulled material from an alternate location, as well as the quantity picked. If you need to change the picking location for a component, set the quantity to 0 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 can 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 the storage level setup.

When using the PULL material issue method for rework or teardown production, you can override the typical method and select a nettable location.

Container ID

Enter the value if you're picking from containers.

Confirm

After reviewing each entry, you can confirm the 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 are not 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 0 or delete the row, and insert a new row.

Completed

Select 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 cannot 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 can 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 does not process this pick line.

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- If you do not select Complete or Confirm, then the material release process does not process the pick line.

Lot ID and **Serial ID**

If you're using the PUSH material issue method, the serial ID 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 0 and insert a new row.

If you're using the PULL material issue method, specify the serial ID or lot ID for each component that you picked.

If you are entering data for rework or teardown production IDs that are using serial genealogy, keep these points in mind:

- If the assembly is serial-controlled and the Serial in Prdn 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 is serial, the Pick Plan process does not suggest the serial ID to pick. You must indicate which serial IDs are to be picked. The system verifies that the components have not been assigned to another production ID.

Note. This logic is also applied to other kit issues.

If you do not 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 do 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 confirm selected pick lines by selecting this check box to indicate that 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. This indicates that you may want to pick additional quantities for specific pick lines.

Save

Click to process the review plan.

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Updating Pick Batches

Use the Update Pick Batch component to review the 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 will not 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 the following 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, select 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 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 the 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.

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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 do not want to release material to production at this point, select the Update Pick Batch process. Process Scheduler runs either process at user-defined intervals.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining User Preferences," Defining Manufacturing User Preferences

PeopleSoft Enterprise Inventory 9.0 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 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 608

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 that 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 used to notify the stockroom 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 Enterprise Flow Production 9.0 PeopleBook, "Understanding the Flow Production Process"

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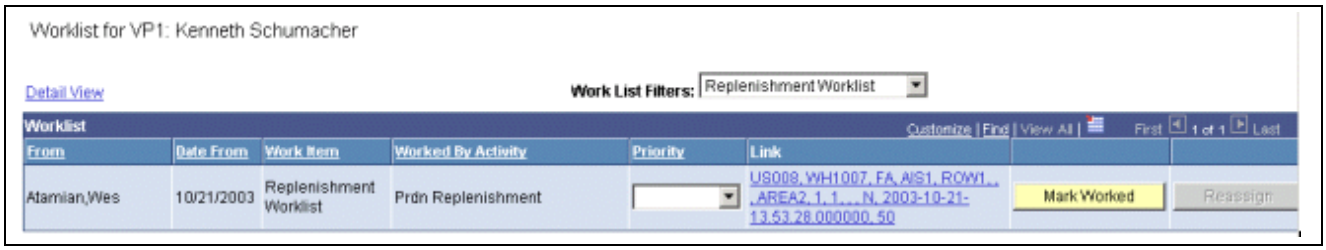
Pages Used to Replenish WIP Locations

Page Name	Object Name	Navigation	Usage
Worklist	WORKLIST	Worklist, Worklist	(Optional) Issue components whose issue method is *Replenish*. Backflush material to create worklist entries for components whose issue method is *Replenish*.
Prdn Replenish Locations (production replenish locations)	SF_REPL_INV	Inventory, Maintain Storage Locations, Production Replenish Locations, Prdn Replenish Locations	(Optional) 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 use replenishment as the component issue method.
Kanban Transfers	BCT_INV_TRFR	• SCM Integrations, Create Transactions, Manufacturing, Kanban Transfer • Production Control, Process Production, Transact Kanbans, Scan Kanban Transfers, Kanban Transfer • SCM Integrations, Create Transactions, Inventory, Storage Location Transfer, Inventory Transfer	(Optional) Enter or scan in Kanban transfers to replenish WIP location using electronic data collection.

Issuing Components using the Replenish Method

Access the Worklist page.



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 displays to the Kanban Transfers page.

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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 appears next to the transfer quantity field. If the business unit parameter allows 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 supplies a default original location based on the information defined on the Item/Replenish Location page or the WIP Replenishment page in business unit items. You can 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 do not 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 Enterprise Inventory 9.0 PeopleBook, "Preparing to Implement PeopleSoft Inventory," Allowing Negative Inventory and Displaying Warning Messages

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory," Defining Basic Business Unit Attributes

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by SetID," Establishing Item Shipping and Handling Attributes

Processing Kit Issues and Returns

Use the Issue/Return 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 cannot return a component that is not 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.

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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 do not 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 Enterprise Inventory 9.0 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory," Defining Default Storage Location Structures and Attributes

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Structuring Inventory"

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by Business Unit," Defining Items at the Business Unit Level

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 is 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 is rounded down to account for any operation yield.

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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	Issue additional kit components to production and return excess or defective components back to stock. **Note.** You must define a production ID with at least one component using the kit 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	IN_PTWY_LOC	Production Control, Process Production, Issue Materials, Issue/Return Kit Components, Kit Issue/Return Location Click the Directed Putaway link.	(Optional) Use directed putaway rules for the component that you're returning to inventory. **Note.** If directed putaway is not 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 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	Edit or view detailed information for each component on the component list.

Processing Kit Issues and Returns

Access the Kit Issue/Return Summary page.

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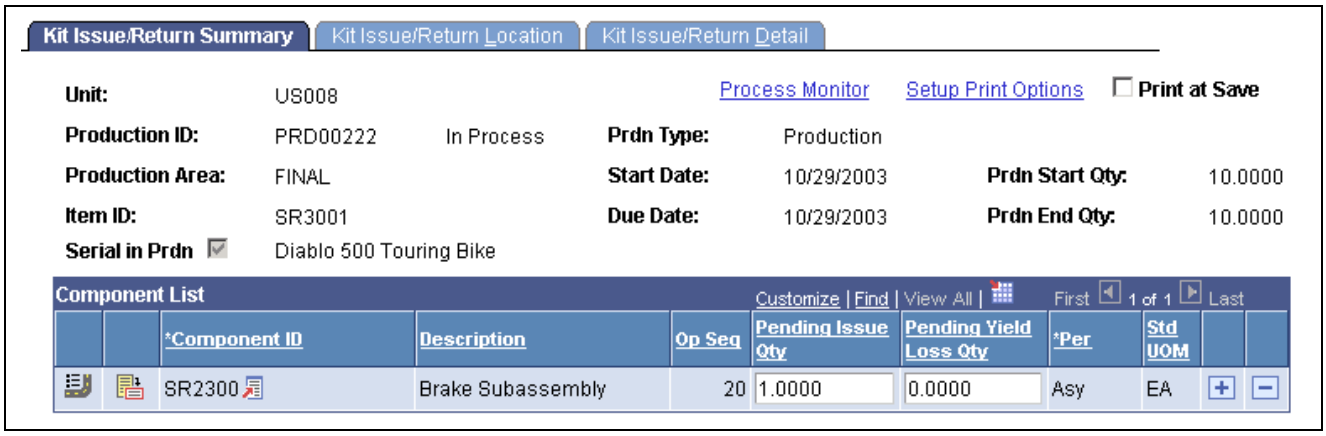

Kit Issue/Return Summary page

Print at Save Select to print production documents for a particular production ID at save time.

Setup Print Options Click 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 on the component list.

You can change any component to a different item ID, or add a new component or substitute. You cannot change the component ID or operation sequence that it is associated with after any quantity has been issued.

For all production types, when adding a new component with item status of *Discontinue,* you receive a warning message. For regular production, you receive a warning message when adding a component with item status of *Hold.* In both cases, receiving the warning message does not prevent you from performing the action. For rework and teardown, components with item status of *Hold* are issued.

For regular production, you cannot add the end item as a component. For rework production, you cannot delete the reworked end item from its component list. For teardown production, you cannot delete the end item to be torn down from its component list. Duplicate components can exist as long as the operation sequence is unique.

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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 cannot process returns for components that do not 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 operation sequence at which the component is used, and indicate whether the component quantity is per assembly or per order.

   The operation sequence is *0* by default. Change the operation to indicate where the component is used.
3. Enter the pending issue quantity and any 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 the changes.

See Also

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS2003 - Production Documents, page 604

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Inquiring and Reporting About On-Hand Stock," Checking Item Availability

Chapter 19, "Maintaining Component Lists," Making Item Substitutions, page 384

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

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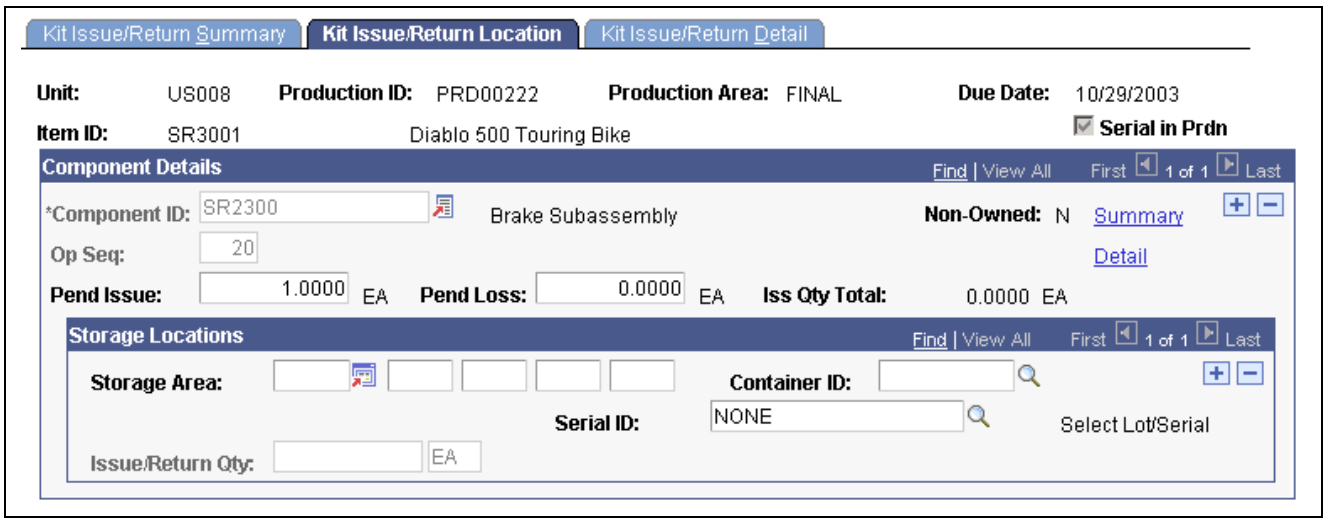
Selecting a Location for Issued and Returned Kit Components

Access the Kit Issue/Return Location page.



Kit Issue/Return Location page

Issue Qty Total (issue quantity total) Displays the total quantity to be issued.

Non-Owned 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 to indicate the storage area.

Click the Storage Location Search button to select a different storage location.

If you're returning a component to inventory and you do not 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 predefined rules for directed putaway. For example, you might want to put away 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 is not 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 that you're returning to inventory.

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Note. If directed putaway is not 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. 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 do not 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 Enterprise Inventory 9.0 PeopleBook, "Preparing to Implement PeopleSoft Inventory"

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory"

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Receiving and Putting Away Stock"

Issuing or Returning Kit Serial-Controlled Components

Access the Lot/Serial Number Selection page.

Serial IDs

If you are issuing additional serial-controlled components, this page displays the serial numbers of the components in the storage 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 the components are not serial-controlled, you must select a serial ID when prompted. The system disassociates the component from the assembly serial ID when you save the page.

If you are returning components on a rework or teardown production ID that has the Serial in Production option selected, you must select a serial ID when prompted. The system disassociates the component from the assembly serial ID when you save the page.

Sel (select)

Select the serial-numbered components that 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 can only select the component's owned WIP storage locations.

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Lot ID The component's lot number indicates if the item is both serial- and lot-controlled. Otherwise, the default value is *NONE*.

Issue Quantity Indicates the display-only issue quantity for serial-controlled items. It should always be *1.0000* for items with serial numbers.

OK Click to accept the selections and to return to the Kit Issue/Return Location page. The lot and serial numbers that you selected appear 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 storage 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 can only select the component's owned WIP storage locations.

If an assembly item's Serial in Prdn option is selected and you are returning a lot-controlled component, the system disassociates the lot component from the assembly serial ID when you save the page.

Issue Quantity Specify the quantity of components that you want to issue or return from each lot.

OK Click to accept the selections and to return to the Kit Issue/Return Location page. The lot and serial numbers that you selected appear 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) and **Pending Yield Loss Qty** (pending yield loss quantity) Although these values appear by default from the Kit Issue/Return Summary page, you can change the quantities here.

Issue Qty (issue quantity) Displays the quantity issued from the storage location and charged to work in process.

Yield Loss Qty (yield loss quantity) Displays 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.

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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 cannot 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 traced by serial genealogy, the components associated with the production ID are 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. **Note.** You can only de-kit a production ID with an *In Process* production status.

Returning Kits to Stock

Access the Component De-Kit Selection page.

Return to Location and Default Putaway Location

The defaults for these fields appear. 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 selected, all components are returned to the location specified. Consigned items are 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 directed putaway to select 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 process (SFS6003) 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.

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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 do not 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 Enterprise Inventory 9.0 PeopleBook, "Preparing to Implement PeopleSoft Inventory"

PeopleSoft Enterprise Inventory 9.0 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory"

PeopleSoft Enterprise Inventory 9.0 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 SCM Integrations navigation, and you can process 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 entered with electronic data collection transaction pages. The background processes validate all information before any updates are performed.

PeopleSoft Manufacturing provides the Production Picking EIP (PRODUCTION_PICKING) to import picking information from third-party systems.

See Also

PeopleSoft Enterprise Inventory 9.0 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	SCM Integrations, Create Transactions, Manufacturing, Production Picking	Import picking information from third-party systems by using the Production Picking EIP.

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Processing Picking Plans Using Electronic Data Collection

You can use electronic data collection to run picking plans.

To run 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 the picking plan.

2. Run the pick plan, which is performed by going to 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. In a paper-based system, you manually record the pick plan feedback using a RF device. Another option is to enter the data at periodic intervals using a stationary workstation equipped with a wedge.

PeopleSoft Manufacturing production picking is based on the assumption that the warehouse already has the required bar code labels in place (such as item labels, storage location, bin, carton, and package labels) to facilitate the data collection. 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 to the main system to be processed and updated in the database. Any line transferred and residing in the bar code transaction log is 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 run these electronic data collection transactions using the Production Picking component:

- M301 - Production Pick Location
- M302 - Production Pick Line Complete
- M303 - Production Pick Batch Complete

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Pages Used to Process Picking Plans Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Production Picking	BCT_MG_PIK	SCM Integrations, Create Transactions, Manufacturing, Production Picking	Run the Production Picking data collection process on transactions.
Production Picking	BCT_MG_REQPICK	SCM Integrations, Process Transactions, Manufacturing, Production Picking	Continuously scan and process the electronic data collection transaction log as long as there are picking transactions in the log. **Note.** 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 Select a processing option. Values are:

- *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 or designated on the pick plan.

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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 or 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 cannot 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, keep these points 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 439.

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, "Understanding SCM Integration"

Chapter 22, "Issuing Material to Production," Creating and Processing Picking Plans, page 424

Processing Electronic Data Collection Picking Plan Transactions

Access the Production Picking process page.

Note. If no pick transactions exist 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 that it runs continuously.

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Process Frequency Because the background processes for electronic data collection run continuously and you use the Process Scheduler to restart 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:

- *Production Picking Process* (SFPEPICK)
- *Pick Process and Matl Release* (SFPIKREL)

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 Enterprise Inventory 9.0 PeopleBook, "Defining Your Operational Structure in PeopleSoft Inventory," Defining Basic Business Unit Attributes

PeopleSoft Enterprise Managing Items 9.0 PeopleBook, "Defining Items by SetID," Establishing Item Shipping and Handling Attributes

Pages Used to Process Kit Issues and Returns Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Kit Issue/Return	BCT_MG_MIS	SCM Integrations, Create Transactions, Manufacturing, Kit Issues/Returns, Kit Issue/Return	Enter issue or return transactions for kit components using electronic data collection.
Kit Issue/Return background process	BCT_MG_REQMISC	SCM Integrations, Process Transactions, Manufacturing, Kit Issues/Returns	Continuously scan the electronic data collection transaction log as long as there are kit issue or return transactions in the log. **Note.** There must be transactions in the electronic data collection transaction log.

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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 positive 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 both 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 439.
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 is 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 terminates. It can be restarted by the Process Scheduler. Use the Process Scheduler with the background process to ensure that it runs continuously.

Process Frequency	Because the background processes for electronic data collection run continuously and you use the Process Scheduler to restart the background processes, this value should be set to Always.
Run	Click to run this request. Process Scheduler runs the Production Misc Issues/Returns process (SFPFMISC) at user-defined intervals.

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CHAPTER 23

Completing Operations and Recording Scrap

This chapter provides an overview of the online completions process and discusses 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.
- Run the Completions Update COBOL/SQR process (SFPDCDRV).
- 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, you 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 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 a production ID, or you can enter a new serial ID for which the system automatically creates the serial association. Additionally, lot auto numbering only applies to configured orders.

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 and shift. The system supports these order types:

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- Production IDs for regular, rework, or teardown production.
- Production schedules for tracking regular production by day and shift.

If you're recording completions and scrap for a production ID with subcontracted operations, you 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 517.

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; there may be independent demand in planning for the primary 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 have either a relief (negative) cost for recycle by-products or a disposal (positive) cost for waste by-products. There is typically not independent demand for by-products.

Expected Output When Using Yield by Operation

The system recalculates 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 recalculates 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 a manufactured item and its process, then the Quality link is active on the Record Completions/Scrap page. You click this link to 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:

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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 Enterprise Quality 9.0 PeopleBook, "Collecting Quality Data"

Chapter 25, "Subcontracting," page 529

Chapter 8, "Maintaining Bills of Material," page 89

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Manage Production Using Discrete Orders

You can manage discrete orders for regular, rework, or teardown production by creating production IDs for each production quantity that you want to track. Once you've created the production ID, you 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 the following 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 the 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) and 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 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 appears.

   You can complete planned or unplanned by-products at any operation. Scrapped end items are recorded at the batch level, but 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 or serial- or lot-controlled items, and the components are issued to production using the Replenish or Issue method, 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. Access the Edit/Issue Express page, 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 cannot route waste by-products.
    a. (Optional) Click the Apply Defaults link to route the end items to a default putaway location.

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Note. The completions process puts away items in their standard units of measure (UOM).

b. (Optional) Select an alternate putaway location.

Note. If you're routing the end item to another production ID, the putaway process is not 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 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 and 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 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 has not been created, you can still record completions. At that time, the system prompts 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.

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Note. If a schedule for the production date and shift has not 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 appears.

   You can add unplanned by-products. Scrapped end items are recorded at the batch level, but 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. Access the Edit/Issue Express page, 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 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 cannot 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 puts away items in their standard UOMs.

   b. (Optional) Select an alternate putaway location.

      Note. If you're routing the end item to another production ID, the putaway process is not required.

7. (Optional) Run the Completions Update process.

   You 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 the production schedules are complete.

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Integrating PeopleSoft Manufacturing with a Third-Party System

You can integrate PeopleSoft Manufacturing with 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 517.

Manufacturing Execution System (MES)

If you're integrating PeopleSoft Manufacturing to an 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 the PeopleSoft system; otherwise the system marks the transactions as errors in transaction maintenance. You then need to make corrections so that 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 the batch quantity complete is not reported. You can report only unplanned by-products, not unplanned co-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 the PeopleSoft system, 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 the PeopleSoft system 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 is not permitted, the system doesn't process the transaction.

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, "Understanding SCM Integration"

Chapter 24, "Recording Completions and Scrap Using Electronic Data Collection," Recording Actual Machine and Labor Hours, page 525

Chapter 1, "Getting Started with PeopleSoft Manufacturing," page 3

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Prerequisites

Before you begin production:

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 that you'll be manufacturing have been assigned to a production area.
   - If the production item will have multiple outputs, you must define the outputs by using the BOM Maintenance - Outputs page before generating the production ID or production schedule.
   - If you're tracking an item within a production area with production IDs, first generate the production ID for the item that you want to produce.
   - If you're using production schedules, you can predefine 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.

   Use the Shortage report to identify any potential component shortages before beginning production.

Common Elements Used in This Chapter

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 appears 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. Values are *Production, Rework,* or *Teardown.*
Prdn Start Qty (production start quantity)	The beginning quantity being produced for the selected production. The system considers any operation yield.
Prdn End Qty (production end quantity)	The ending quantity being produced for the selected production. The system considers 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 appears if the item entered is revision-controlled.
Source Cd (source code)	Indicates if the production is *Make* or *Buy.*
Quality	Click this link to initiate a data entry session and access either the Data Entry - Subgroup Method page or the Data Entry - Sample Method page in PeopleSoft

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Quality, depending on the data entry method that you specified when creating the quality control plan. On the Data Entry pages in PeopleSoft Quality, you record quality control information for the manufacturing process for the item and then access 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 the production quantity.
- Record completions and scrap for the production run with multiple outputs.
- Scrap end items at an operation.
- 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 record quality control information for the manufacturing process for the end item and then access 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 that production has been completed for the production ID.

Note. Primary items and co-products can be completed only 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 might include a quality manager or a production control manager.

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Understanding the Process of 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 an entire production ID.
- Move the completed end items to stock, WIP location, or another production ID.

Note. There is no difference between the method that you use to record completed and scrapped end items for regular production and the method that 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 the Manufacturing business unit production options for the autorelease of production IDs. When setting up the 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 must still issue material to the WIP locations using the Pick Plan and Material Release components. If you're using the production replenishment method, ensure 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.
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.

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Page Name	Object Name	Navigation	Usage
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 completed end items.
Rapid Serial Numbers	MG_SERIALRG_PG_SBP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Generate Serial IDs link.	(Optional) 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	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) 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.
Lot/Serial Number Selection scroll area	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) 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.

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Page Name	Object Name	Navigation	Usage
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

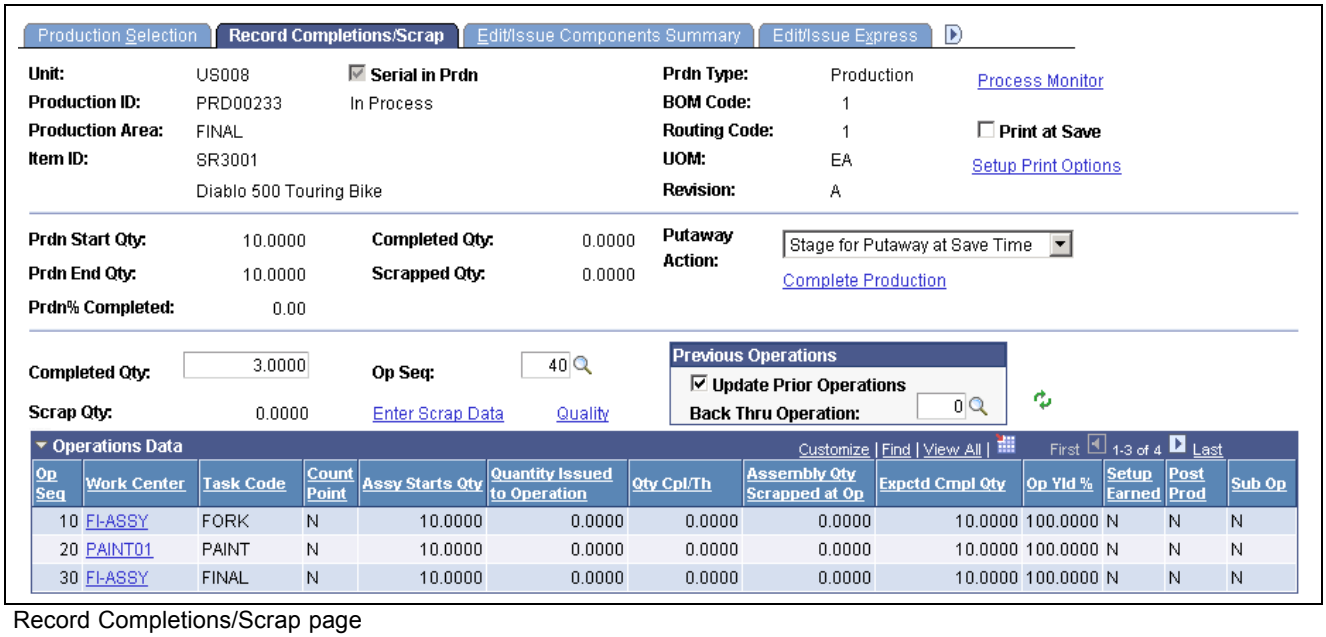
Access the Production Selection page.

Unit and **Production ID** Enter values for the production ID that you want to record completions and scrap.

Search Click to retrieve the selected production ID.

Defining Completions and Scrap Information for Production IDs

Access the Record Completions/Scrap page.



Record Completions/Scrap page

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Previous Completions Information

Prdn Start Qty (production start quantity) and **Prdn End Qty** (production end quantity)

Displays default quantity values from the Production ID Maintenance component. These values are updated whenever the quantity completed is changed.

Prdn% Completed (production percentage completed)

Displays the percentage of the batch production quantity that has been completed prior to this transaction.

Completed Qty (completed quantity) and **Scrapped Qty** (scrapped quantity)

Displays a quantity that 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. Options are:

- *Putaway at Receipt Save Time:* Select 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:* Select to designate that these completions will use the PeopleSoft Inventory putaway process at a later time.

Note. Upon saving the page, either stage the item for putaway or initiate the putaway process.

Item completions are not 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 record only scrap. When using count points, completion quantities can only be entered at operations flagged as count point operations.

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Update Prior Operations	Select this option if you want to automatically record completions and scrap for prior in-house operations at the same time that 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 that 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, do not enter any information in this group box, and ensure that 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.

Example: Recording Completions

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 appear as follows:

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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 cannot 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 ignores 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.

Yield by Operation Example: Completing Less Production End Quantity than Expected

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 percent

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. Because there is a 100 percent 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 percent 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.

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Yield by Operation Example: Completing More End Items than Expected

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 percent

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. Because there is a 100 percent 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 percent operation yield and underscrapping occurred (scrapped less than expected). Out of the operation start quantity of 69, all were completed and 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 529

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 the 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 are given the option to create the association.

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If a routing has operation yield, a reported scrap quantity that is not equal to the expected scrap quantity changes start and end quantities at subsequent operations. It also changes the expected end quantity for the production order.

Note. If the scrap quantity is greater than the production end quantity, the system updates the production start quantity so that the ending production quantity meets 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 percent complete before they were scrapped, enter that percentage here. In this example, when calculating the cost of scrapped end items, the system allocates all prior operation costs, plus 75 percent of the runtime 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. You can override the distribution type for each transaction.

Note. If you're scrapping production that has an operation yield less than 100 percent, 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: 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:

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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 cannot 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 or 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

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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 and 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 noncount point operation. In this case, the system records completions for any previous operations back to the operation after the previous count point (operation 40):

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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 are not 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 529

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 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 appear.

   Note. When you record completions at the last operation (which must be a count point), the system assumes that you have or will complete at all prior count points. Therefore, the completed quantity is updated only back to the prior count point.

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Because 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 operation after the prior count point (operation sequence) appears by default. 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 automatically completes 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.

Example: Recording Completions Using Count Points

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:

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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

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 477

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 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 IDs, or container IDs 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.

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Note. The completions process puts away items in their standard UOMs.

Moving Completed End Items and Assigning Serial and Lot Numbers

To define default putaway locations, use the Default Putaway Locations (DEFAULT_LOCATION) component. Use the DEFAULT_LOCATION_CI to load data into the tables for this component.

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 put away completed end items to 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 scroll area unless you need to identify serial numbers, lots, or containers.

- To other production areas to fulfill component requirements and relieve shortages out on the shop floor.

  Use the Route-To PID/Stor 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 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 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 are 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 receive this message: "Tearing out more than has been issued to the original assembly serial. Okay to continue?" Double-check the quantity and serial ID. Click 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 production ID, the system checks that:

1. The item being completed is a component of the production ID parent item.
2. The issue method is Kit.
3. The production ID status is *Released* or *In Process.*
4. The shortage quantity is greater than zero.

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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 process to update the production information for the production schedule, either at save time or as a deferred process.

Note. You cannot route waste by-products. They are 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 do not 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 inventory stores location:

- Assign serial and lot numbers to the completed end items if the completed end items are serial- or lot-controlled.
- (Optional) 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.

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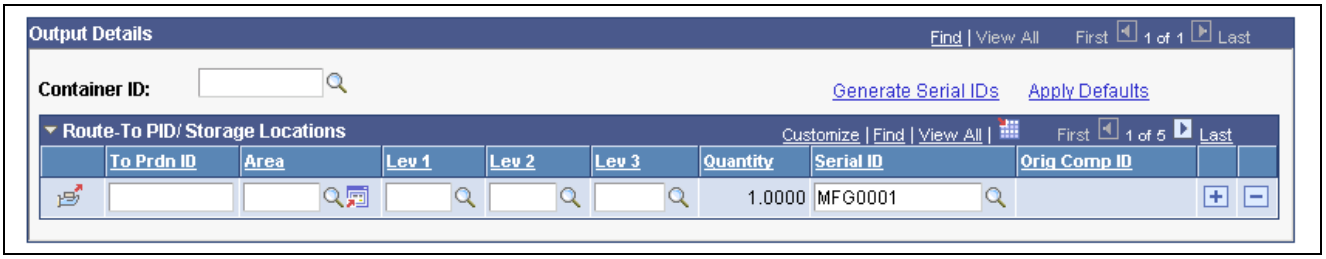
Pages Used to Move Completed End Items and Assign Serial and Lot Numbers

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 scroll area	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completion/Scrap Enter a completed quantity and the last 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 a completed end item.

Moving End Items for Completed Production

Access the Route-To PID/Stor 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 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 scroll area appears. However, the operation sequence for all end items, *except by-products,* is unavailable.

Click the Shortages button on the Route-To PID/Stor Locations scroll area on the Record Completions/Scrap page.

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See Chapter 23, "Completing Operations and Recording Scrap," Viewing Production Shortages, page 480.

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 to use the completed end items on the production ID with shortages.

OK Click this button to cause the production ID to appear in the To Prdn ID (to production ID) field in the Route-To PID/Stor 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 cannot route end items to a production ID. If you route to a production ID, you cannot route to a specific storage location.

Quantity Enter the number of end items to be routed.

Orig Comp ID (original component ID) Displays the original component ID if the end item is a substitute.

Save Click to route completed end items.

Selecting Default Putaway Storage Locations

Access the Apply Defaults page.

Deft Storage Loc (default storage location) Displays the default putaway location for the completed end items, if defined. When you accept the defaults in these fields, the completed end items are automatically moved to the default putaway location for the item when you run the PeopleSoft Inventory putaway process.

If you are not 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 2Level 3,* and *Level 4,* that have been defined for each storage area.

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Note. The completions process puts away items in their standard UOMs.

Directed Putaway If you do not enter a storage location, you are not routing to a production ID, and you have activated Directed Putaway for the 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

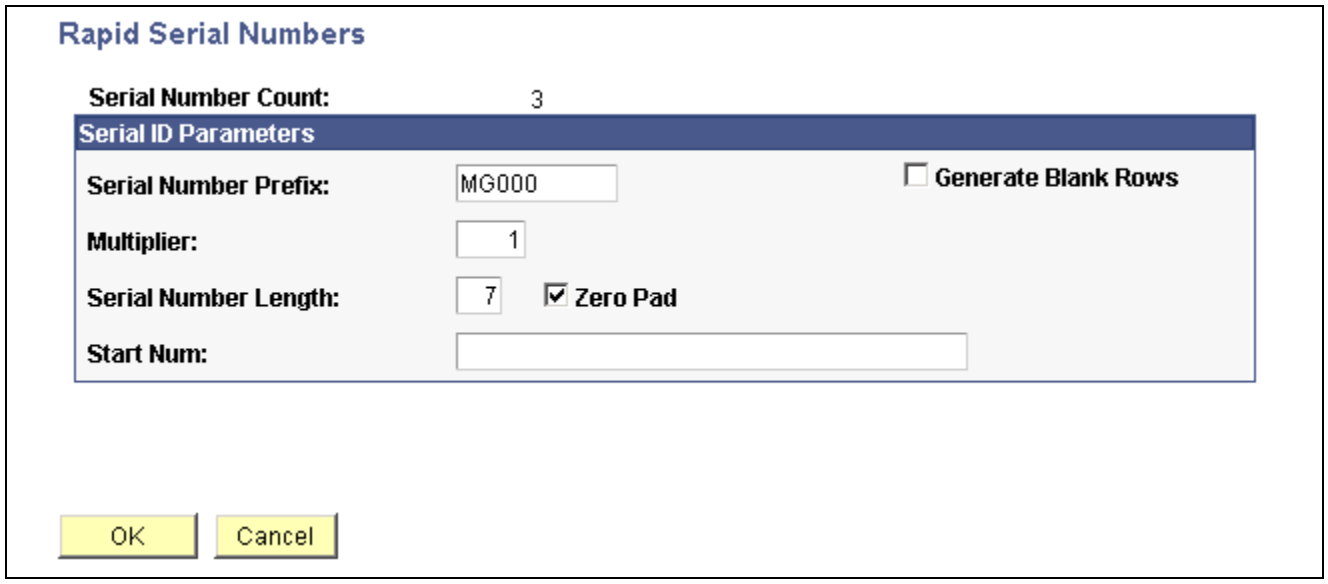
Access the Record Completions/Scrap page.

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 cannot 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 page

Serial Number Count Displays the number of completed end items that the system assigns serial numbers. A serial number is 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.

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Serial Number Prefix,Multiplier, Serial Number Length, and **Zero Pad**

You can use the default values for the business unit or 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 that 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 do not have to enter a starting number. If you leave the field blank and click OK, you receive a warning that the starting serial number is blank and zero appears by default. In this case, the starting serial number is MFG00000. If you enter *1* in this field, the starting serial number is MFG00001.

OK

When you click this button, each completed end item, along with the corresponding serial number, appears in the Route-To PID/Stor Locations scroll area on the Record Completions/Scrap page.

Selecting a Lot ID

If an 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

To move completed end items to a stores or other inventory location, complete these tasks using PeopleSoft Inventory:

1. Run the 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 multistep process using PeopleSoft Inventory Auto Putaway.

2. Run the 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 is not selected.

     Then click Putaway to initiate the putaway process.

   - If necessary, change the location, and then click Putaway to initiate the putaway process.
   - If you selected Flag Items for Autoputaway on the Load Staged Items page, you do not need to run the Stockroom Feedback process.

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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 that automatically initiates the putaway process.

Recording Completions and Scrap for Production IDs with Multiple Outputs

You 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 Enterprise Inventory 9.0 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 operation sequence, and then press the TAB key.

Entering Completions Quantities for Production IDs with Multiple Outputs

Access the Output Details scroll area on the Record Completions/Scrap page.

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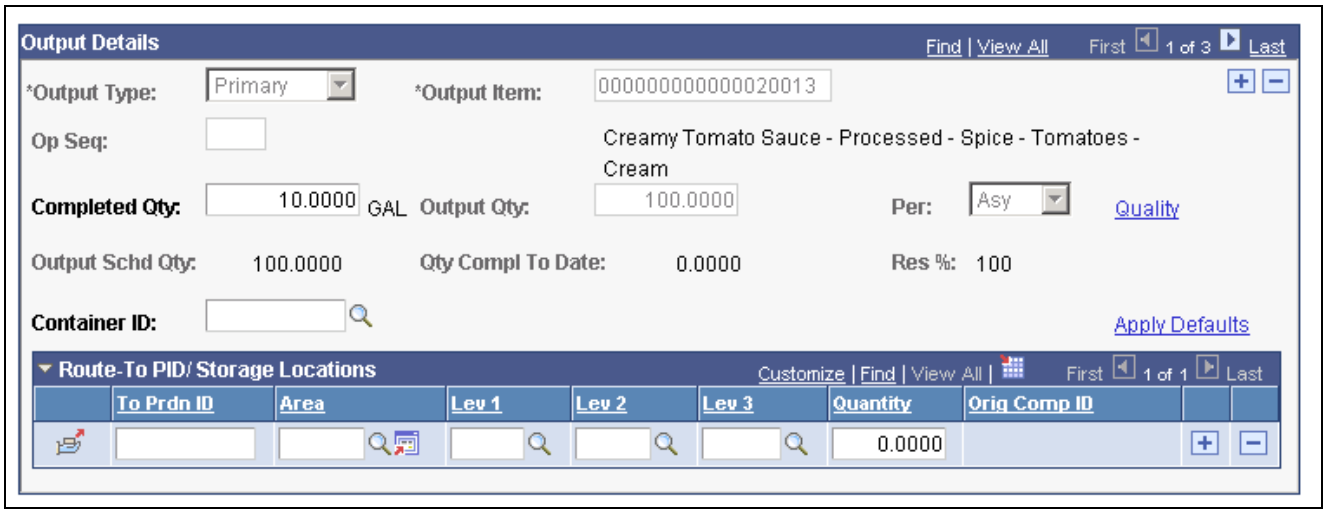

Output Details scroll area on the Record Completions/Scrap page

To enter batch completions quantities (for production IDs with multiple outputs):

1. Access the Record Completions/Scrap page.
2. Enter a completed quantity and select an 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 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 operation sequence where the by-product is being generated.

      The default operation sequence is zero, and if you do not 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) — Displays the output production quantities completed prior to this transaction.

Output Schd Qty (output scheduled quantity) — Displays the total scheduled output production end quantity. This is the output quantity that you expect to produce for each output. This field is display-only for primary items and co-products.

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Output Quantity	Displays the output production quantities based on per assembly or per order. You can adjust this field for by-products. You cannot change the output quantity for primary or co-products on this page.
Quantity Per	Indicates whether the quantity required is per assembly or per production order.
Res % (resource allocation percentage)	Determines how much of the BOM batch quantity the primary items and co-product represent. 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 percent.

Example: Batch Calculation

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 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 expected production ID quantities. For example, perhaps the oranges that 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 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 a WIP location.

See Chapter 23, "Completing Operations and Recording Scrap," Moving End Items for Completed Production, page 479.

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 the completion.

See Chapter 23, "Completing Operations and Recording Scrap," Editing Component Lists, page 493.

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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 the 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 that 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 still must issue material to the WIP locations using the Pick Plan and Material Release components. If you're using the production replenishment method, ensure that sufficient inventory exists in the WIP location.

Note. Quantities of an item that are stored in a nettable, available WIP location and reserved for production use are not 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 prompts you for the schedule quantity and the production schedule is automatically created with a status of *In Process.* You can then backflush a partial quantity or the entire production quantity and record any scrap.

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- If you're using the production issue method, you still must issue material to the WIP locations to ensure that 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 in the WIP location.

This section lists common elements and discusses how to:

- Record completed and scrapped end items for production schedules.
- Peg to a specific production schedule.
- Add a new production schedule during completions.
- Define completions and scrap information for production schedules.
- Record completions and scrap for production schedules with multiple outputs.
- Move end items for production schedules.

Common Elements Used in This Section

Prdn Start Date (production start date) — The date on which the production is due to begin.

Prdn Due Date (production due date) — The date on which 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* always appears.

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 Complete to a Specific Schedule link.	Peg completions to a specific production schedule row.

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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. 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.
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	MG_SERIALRG_PG_SBP	Production Control, Process Production, Complete Production, Record Completions and Scrap, Record Completions/Scrap Click the Generate Serial IDs link.	(Optional) 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 Centerlink in the Operations Data scroll area.	View work center-related information such as WIP locations.
Lot/Serial Number Selection	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) 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.

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Page Name	Object Name	Navigation	Usage
Lot/Serial Number Selection scroll area	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) 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 the 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.

Complete to a Specific 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/routing effective date, which is the current date by default, 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 that will be used for the components and outputs. If the item is revision-controlled, then both an item revision code and BOM/routing effective date must be selected.

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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 January 1, 2001, but BOM code 2 and routing code 2 is valid from June 1, 2001 for the same production area, then you could create production schedules for the 1/2 combination prior to June 1, 2001 but completing them after this date. In this case, the system is unable to consume for them because the new BOM/routing combination has taken effect. In addition, you 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/routing effective date back to a date prior to June 1, 2001, the system accesses 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 displays 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 is not revision-controlled, the current date is displayed in the 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 505.

Search Click to retrieve the selected production schedule.

Pegging to a Specific Production Schedule

Access the Schedule Selection page.

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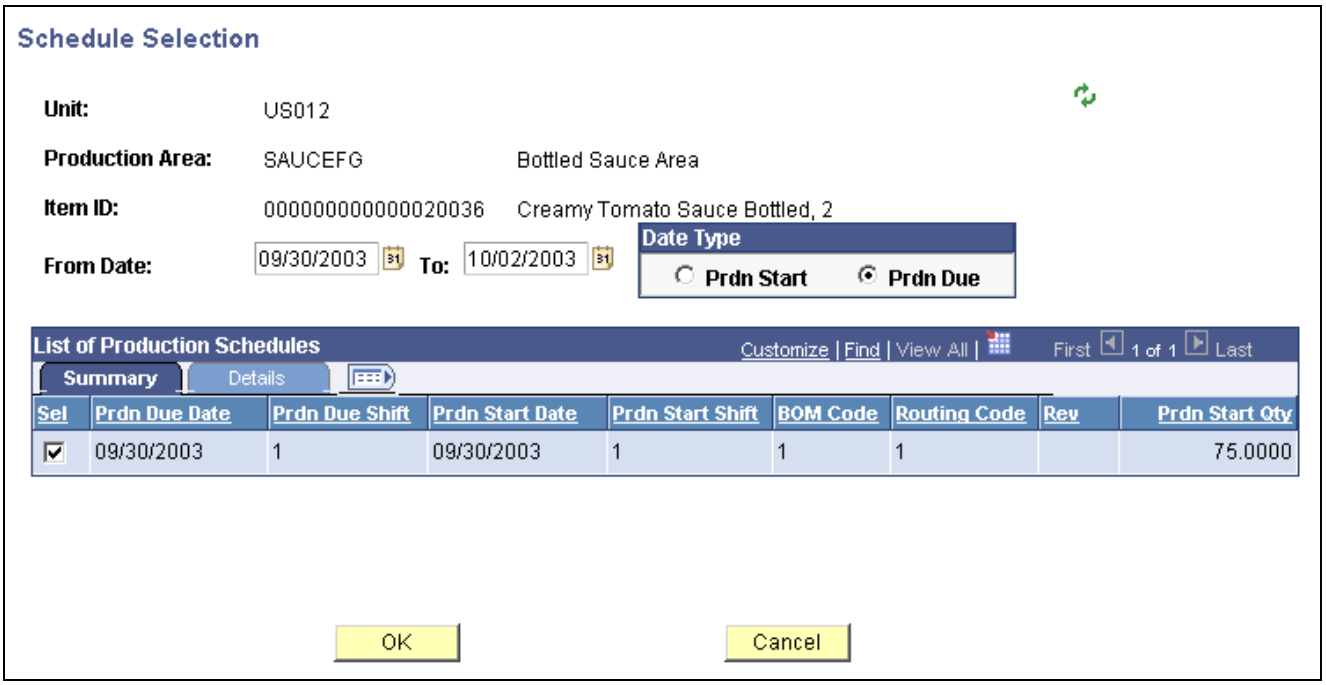

Schedule Selection - Summary page

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 update the specific production schedule when you run the Completions Update process.

Date Range Enter the date range.

Date Type Displays how you want to view the production schedules. Values are:

- *Prdn Start* (production start)
- *Prdn Due* (production due)

Click to refresh the data if you made any changes to the 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 receive a warning message indicating that no outstanding production quantities exist for an area or 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_DTLs) (*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 or item definition appears as Production Rate Quantity. Click OK to accept this quantity or change the quantity to the quantity that you're currently producing.

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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, use the Prod Schedule Status Change page or the Production Status Change process (SFPARELS). This process looks for production schedules that match the date, shift, BOM code, routing code, and primary end item of the selection criteria. The system releases all the production schedules with a status of *Entered* that match the 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 select one of these completions actions:

Completions/Putaway on Save	Use this option to initiate the Completions Update process 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 is 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 quantity that 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 field is unavailable and the last operation step appears.

   Note. Because you're completing a production schedule, the Update Prior Operations check box is unavailable, and the first operation step appears by default in the Back Thru Operation field. These fields are display-only and cannot 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 quantity for each output.

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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.

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6. (Optional) Click Add to add recycle or waste by-products.
    a. Select the output type and output item.
    b. Select the operation sequence where the additional by-product is being generated.
    c. Enter the 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 scroll area becomes available. You use the Route-To-PID/Stor 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.

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- 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 cannot change the component ID or operation sequence it is associated with once the component has been issued. In addition, for rework production, you cannot change the end item that is being reworked and for teardown production, you cannot change the end item to be torn down.

- For all production types, when you add new components with an item status of *Discontinue,* you receive a warning message.

  For regular production, you receive a warning message when you add a component with an item status of *Hold*. In both cases, receiving the warning message doesn't prevent you from performing the action. For rework and teardown, components with an item status of *Hold* are issued.

- For regular production, you cannot add the end item as a component.

  On the other hand, for rework production, you cannot delete the reworked end item from its component list. Duplicate components can exist as long as the operation sequence is unique. You cannot 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 cannot 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 cannot be a phantom or a component of a phantom. Where substitutes exist for a component, the component cannot be changed to a phantom.

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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 or item and dates of the production schedule and clicking the Search button, a message appears if there are any existing pending quantities for production schedules that match the selection criteria. If Yes, then the components with existing pending quantities appear.

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 cannot 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.
Issuing lot-controlled components to production	Decreases the lot quantity on-hand.
Returning lot-controlled components to inventory	Increases the lot quantity on-hand.

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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 do not 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.

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Page Name	Object Name	Navigation	Usage
Edit/Issue Express	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.	(Optional) Select lot- or serial-controlled components that have pending issue or pending loss quantities.
Lot/Serial Number Selection	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) Select the lot or serial numbers or both 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 the selection criteria.

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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)	Displays the current date if the item is not revision-controlled. The revision or effective date determines the BOM configuration used to create the component list.
BOM/Rtg Effdt	Select a value if you have predefined specific BOM and 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 and routing combination.
BOM Code and Routing Code	Displays valid codes for the BOM and 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 253

Editing or Issuing Component Summaries

Access the Edit/Issue Components Summary page.

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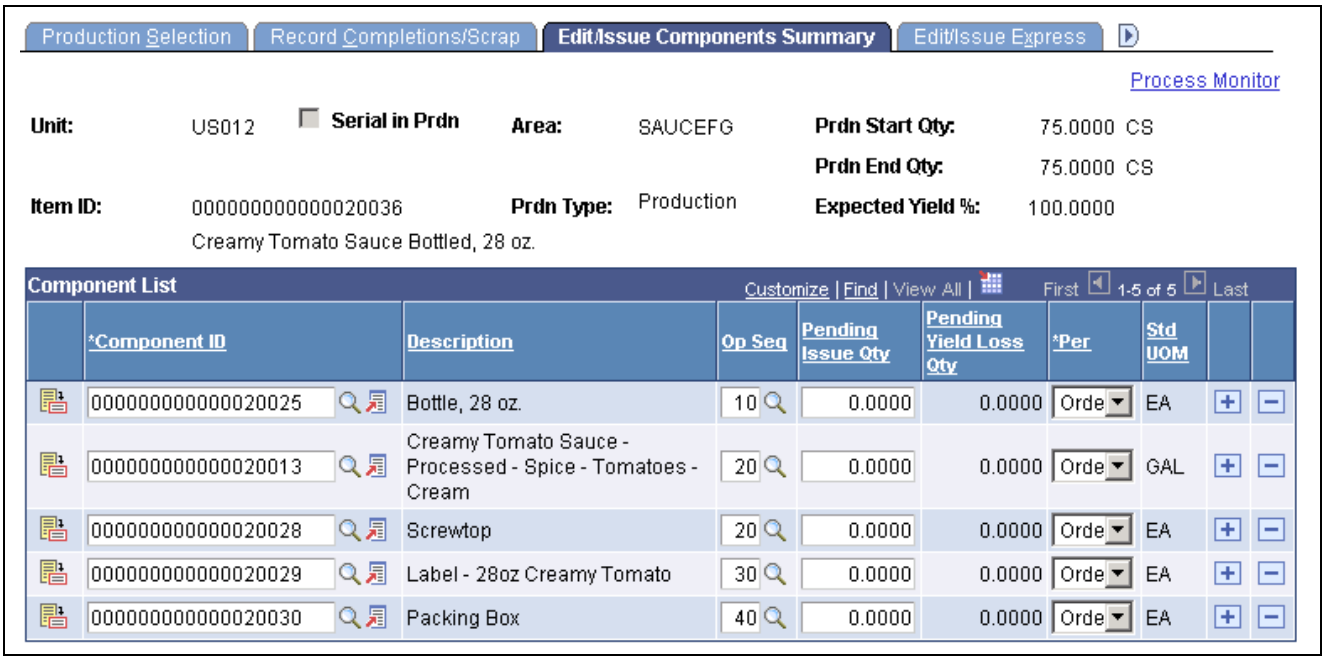

Edit/Issue Components Summary page

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 is consumed from the WIP location associated with the operations work center.

Per Indicates whether the quantity required is per assembly *(Asy)* or per order *(Ord)*. 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 assembly, the system calculates the consumed quantity by multiplying the quantity per by the end item completion and scrapped quantity.

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- If the component is per 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 will not 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)

The 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 appears. This quantity is 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 nonzero 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 displays 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 *do not Calc Per Ord on Prdn Sched,* the system doesn'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 or item level. If you do not want the system to calculate pending yield loss quantity, then you 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)

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Adding or Substituting Components

Component ID, Op Seq (operation sequence), **Per Asy** (assembly) or **Ord** (order), **Pending Issue Qty** (pending issue quantity), and **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 are not calculated for expensed or floor stock items. In addition, you cannot 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 the PeopleSoft Inventory business unit parameter allows negative inventory balances and there is not 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 do not 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 that you're consuming is serial-controlled, you cannot 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.

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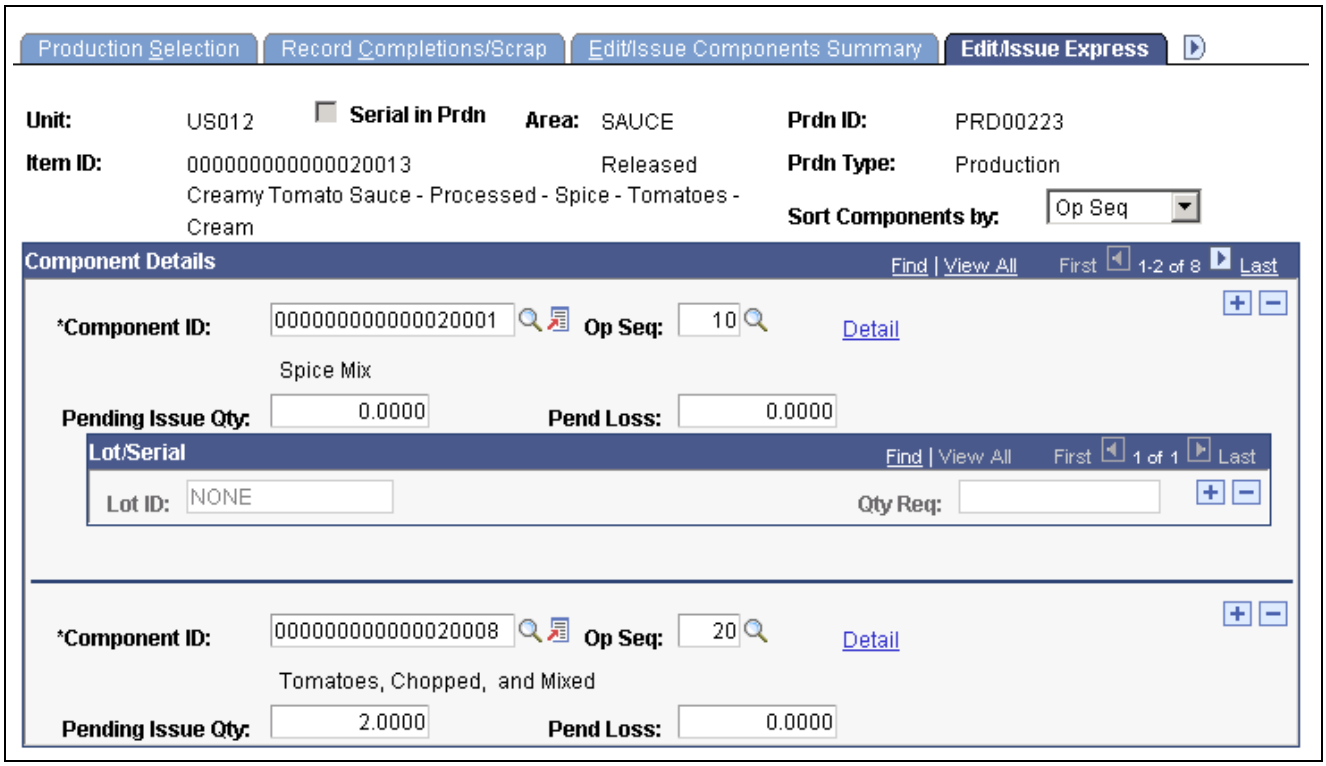

Edit/Issue Components - Edit/Issue Express page

Component Details You can change any of this information on this page:

- Component ID
- Pending issue quantity
- Operation sequence
- Pending loss

Consuming Serial-Controlled Components

Access the Lot/Serial Number Selection page.

Sel (select) Select the serial-numbered components that 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 that you want to consume from each lot.

Editing or Viewing Component Detail

Access the Edit/Issue Components Detail page.

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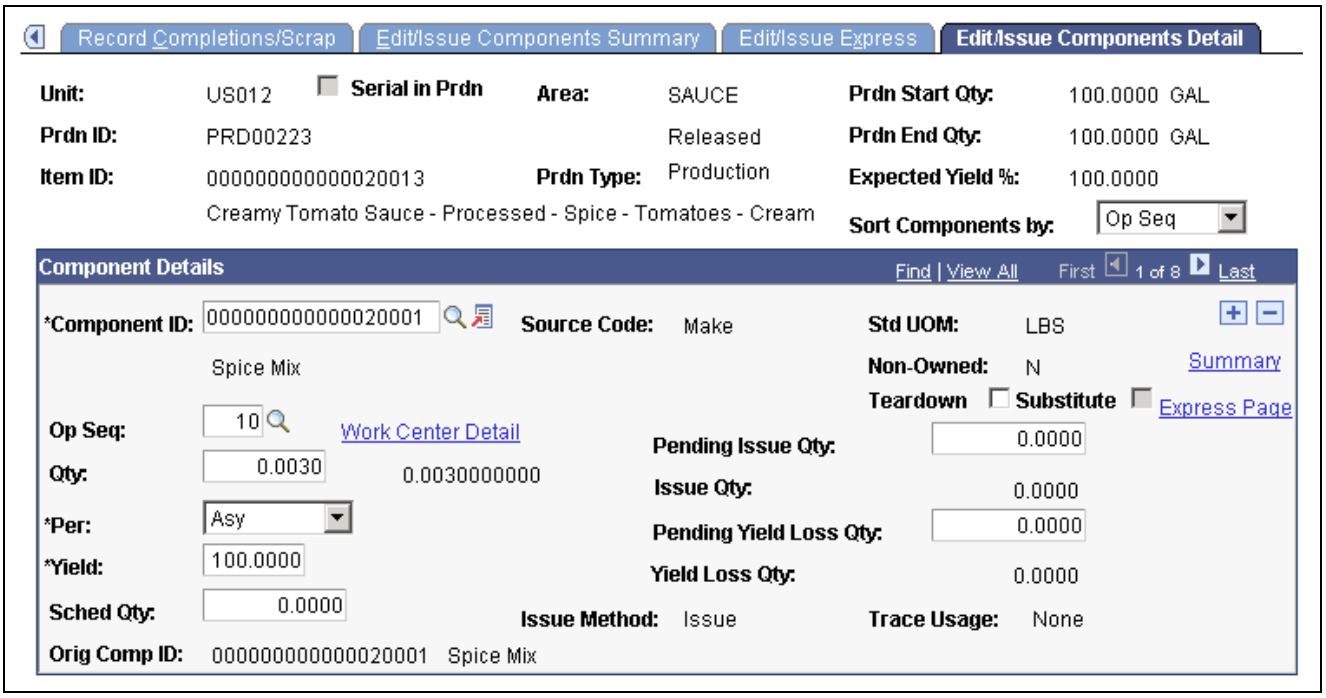

Edit/Issue Components Detail page

Component Details

Component ID, Op Seq (operation sequence), **Qty** (quantity), **quantity Per, Yield,** and **Sched Qty** (scheduled quantity)

Enter or modify 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) and **Pending Yield Loss Qty** (pending yield loss quantity)

Although these values appear by default from the Edit/Issue Components Summary page, you can change them here.

Note. If you are not completing end items, a pending issue or pending yield loss quantity greater than zero indicates that 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 cannot modify kitted components here. This field is used for production IDs only.

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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 are not 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.

Running 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 run this process to update production quantities for production schedule completions and scrap. You 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 COBOL /SQR Process (SFPDCDRV)

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 • SCM Integrations, 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. Process Scheduler runs the Completions/Scrap Update process at user-defined intervals.

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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 that 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 brings the completed quantity balance for that operation to 6.

This reversing entry:

- Rebalances the completions or scrap count.
- In the case of a production schedule, rolls back the reversing entry through all prior operations.
- In the case of a production ID, rolls back the reversing entry through the specified prior operation, or back to the previous count point.
- Automatically returns any components that were consumed at the current operation to the appropriate WIP location.
- Creates a reversing entry for earned labor, machine, and overhead costs.

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Pages Used to Create Reversing Entries to Correct Data Entry Errors

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	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) Select the serial numbers of the serial-controlled components to be returned.
Lot/Serial Number Selection scroll area	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions and Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) 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 **Production ID** Select values to reverse entries for a production ID.

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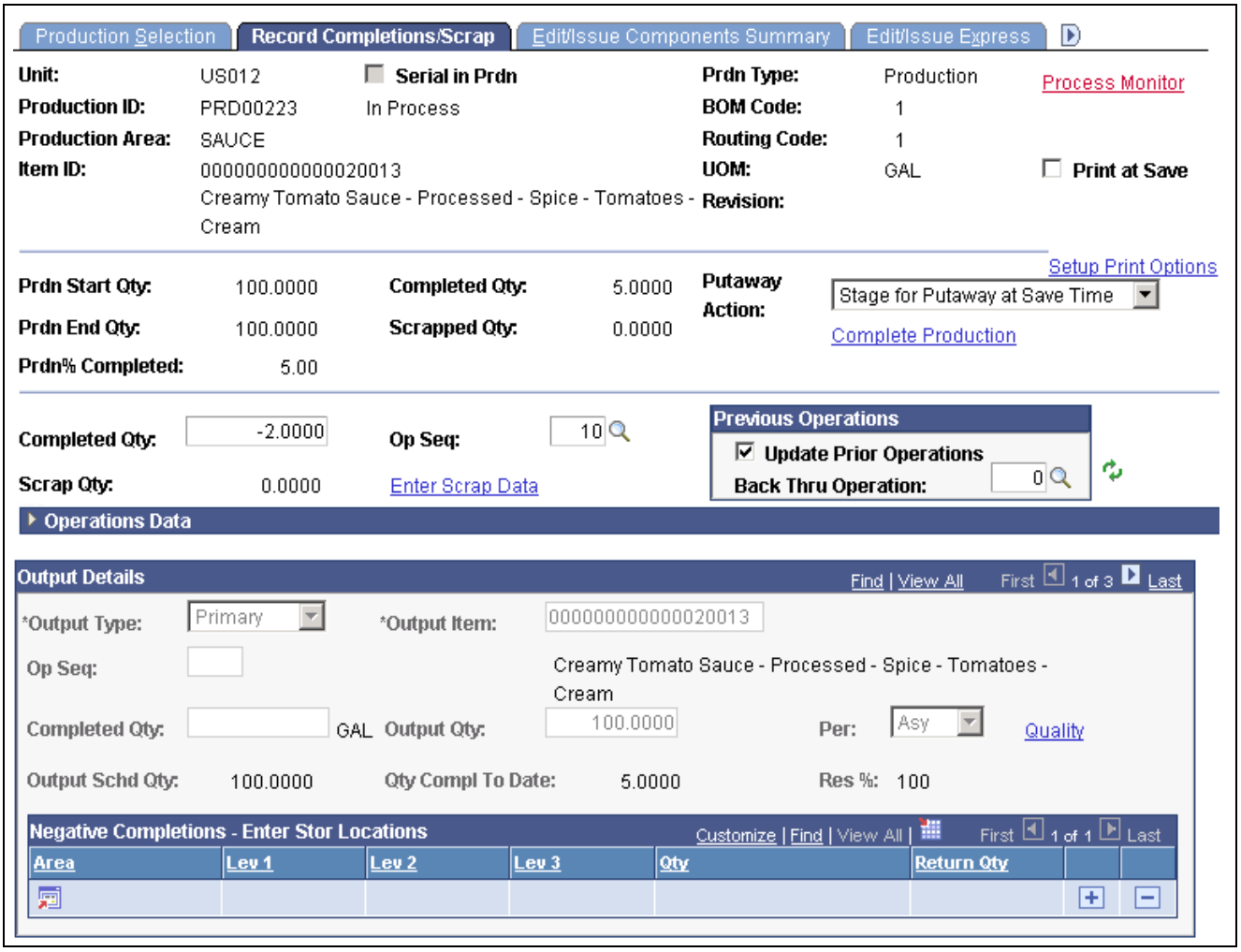
Unit, Production Area, and **Item**	Select values to reverse entries for a production schedule.
BOM/Rtg Effdt	Enter an effective date to determine the particular BOM and routing combination for which you want to complete.
Peg Schedule	Click this link if you want to select a specific production schedule.
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 are 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.



Record Completions/Scrap page

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Completed Qty (completed quantity) Enter a *negative* return quantity in this field.

Note. If you enter a negative quantity in the *Completed Qty* (completed quantity) field, and you didn't select the negative completion on the Record Completions/Scrap - Production Selection page, you receive a message asking if you're doing a negative transaction. If Yes, then the transaction automatically selects the *Negative Completions* option for you, and you do not 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 that 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 *negative* number in this field.

Serial IDs Click this link if you're correcting data entry errors for serial-controlled components. Select each serialized item that 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.

Example: Negative Completions When Using Count Points

Count point operations: 30, 50

Production start quantity: 10

Step 1

Production start quantity completed: 10

Completing at operation sequence: 30

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Back through 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 or returned: -5

Reversing end item completions at operation sequence: 3

Update previous back through 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
40	5	0	0
50 (count point)	0	0	0

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Example: Negative Completions When Not Using Count Points

Production start quantity: 10

Step 1

Production start quantity completed: 10

Completing at operation sequence: 30

Back through 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 also must 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 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 are not 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.

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- 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 are 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 cannot earn setup costs 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 run the Complete Production process.

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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 enables 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.

Viewing Scrap and Earned Conversion Cost Information

On a periodic basis, you want to monitor scrap and earned conversion costs associated with production. Viewing this information gives you a good idea of how the manufacturing floor is performing. PeopleSoft Manufacturing provides you with the ability to view scrap and earned conversion costs for production IDs and schedules in the production environment.

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Pages Used to View Scrap and Earned Conversion Cost 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.

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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 the 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 the 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.

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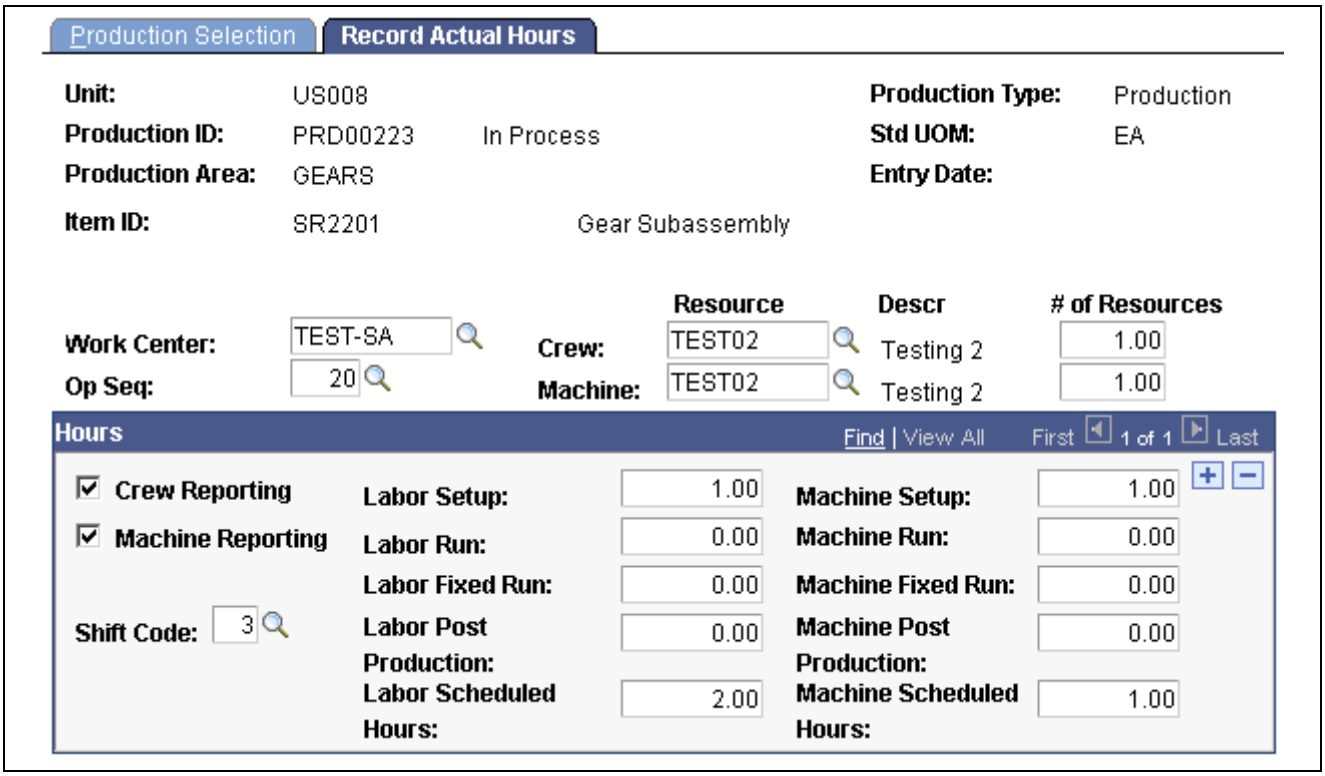

Record Actual Hours page

Op Seq (operation sequence) and **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 appears on the page.

You can, however, change 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 or 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 that 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 that you record by the number of machines to determine the total number of actual machine hours for performance reporting.

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Labor Hours or **Machine Hours**

Enter the number of hours based on:

- Setup
- 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 postproduction 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.

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CHAPTER 24

Recording Completions and Scrap Using Electronic Data Collection

This chapter provides an overview of the process of recording completions and scrap using electronic data collection and discusses how to:

- Record completions using electronic data collection.
- Process electronic data collection completions transactions.
- Process other electronic data collection transactions.
- Edit components.
- Record actual machine and labor hours.

Understanding the Process of Recording Completions and Scrap Using Electronic Data Collection

You can record completions and scrap for the production using electronic data collection.

You can access the electronic data collection transaction pages through the SCM Integrations 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 the 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.

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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 do not 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) and **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)	(Optional) Select the account to which you want to charge the scrap.
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 and scrap production with a single output.
- Record multiple output completions.

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Pages Used to Record Completions Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Completion/Scrap	BCT_MG_CPL	SCM Integrations, 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	SCM Integrations, 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.

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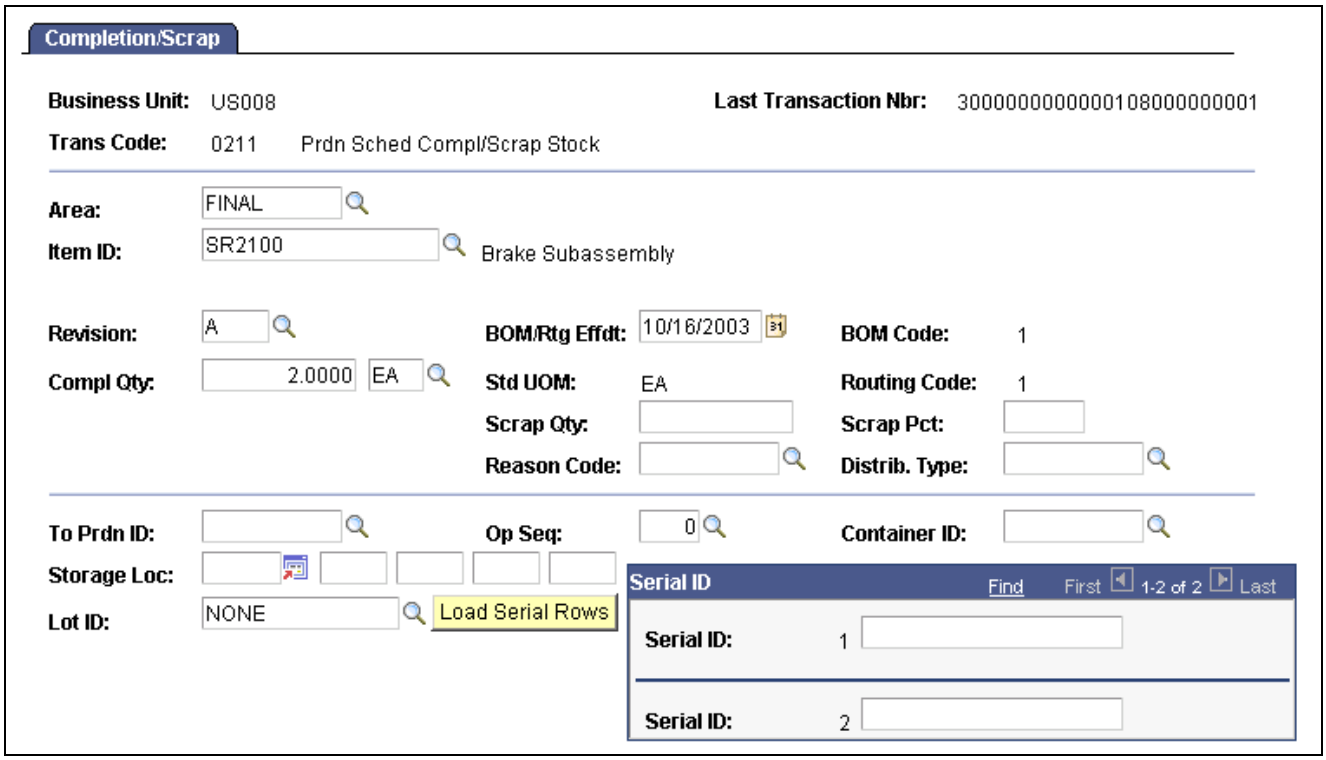

Completion/Scrap page (for production schedules)

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 are not 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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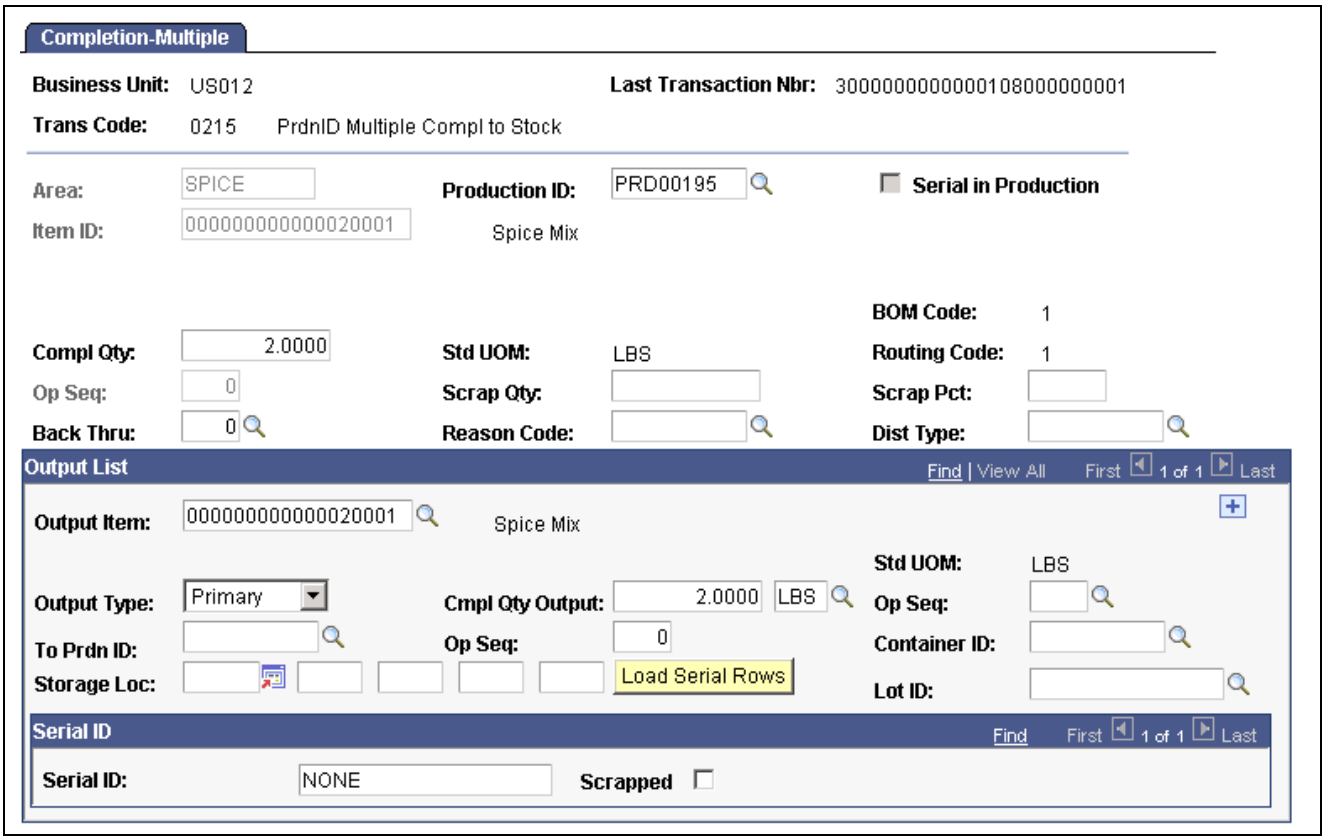

Completion-Multiple page (for production IDs)

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,** and **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.

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Load Serial Rows If the end item is serial-controlled or being tracked using serial genealogy (serial in production), enter a completed quantity, which should include any *scrap* 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 cannot 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 indicate 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

To set up your system to generate bar code labels, use the Setup UCC/EAN Manufacturer ID (BCT_MFGID_SETUP) component.

See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, "Understanding SCM Integration".

After you've run the Completions/Scrap process to update the systems with completions data, create and generate completions labels.

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Pages Used to Process Other Electronic Data Collection Transactions

Page Name	Object Name	Navigation	Usage
Production Selection	RUN_SFS7004	SCM Integrations, Barcode Labels, Completion Label, Production Select	Select the production to create bar-coded labels for end item completions.
Completion Labels,	RUN_SFS7004B	SCM Integrations, Barcode Labels, Completion Label, Completion Labels	Enter the production quantity and number of labels that you want to create.

Creating Completions Labels

Access the Production Selection page.

Production ID Select a 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 do not select this 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

This section provides overviews of the process of editing or issuing components using electronic data collection and the Production Order Issue EIP and discusses how to record production component issues and returns.

Understanding the Process of 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 cannot use an electronic data collection system to issue, return, or substitute components for production schedules.

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You can access the electronic data collection transaction pages through the SCM Integrations 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 an 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 have a status of Released, In Process, Pending, or Pending Complete. This can be done before the manufacturing process begins, any time during the manufacturing process or at completions.

Page Used to Edit Components Using Electronic Data Collection

Page Name	Object Name	Navigation	Usage
Component Issues/Returns	BCT_MG_CISS	SCM Integrations, 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 and Returns

Access the Component Issues/Returns page.

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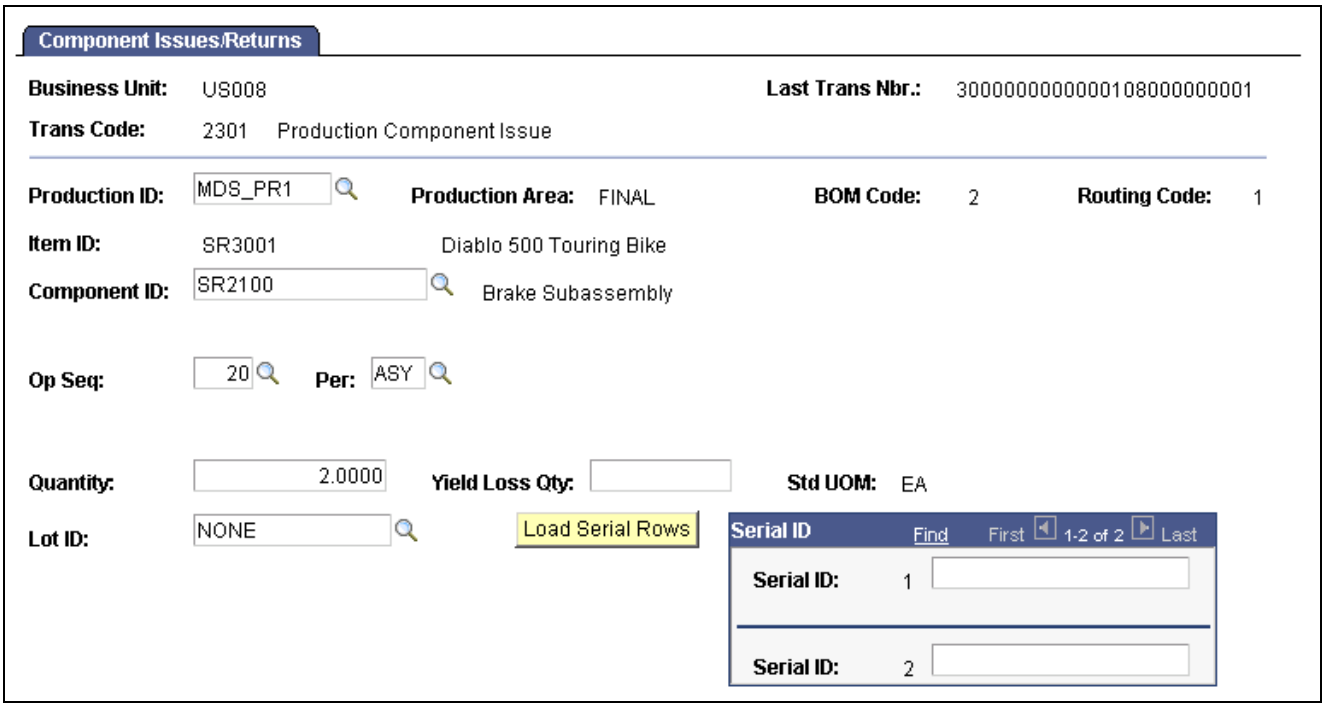

Component Issues/Returns page

Component ID Select the component that 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 the 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 cannot 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 SCM Integrations 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 Machine and Labor Hours

Page Name	Object Name	Navigation	Usage
Actual Hours	BCT_MG_ACT	SCM Integrations, 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	SCM Integrations, 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.

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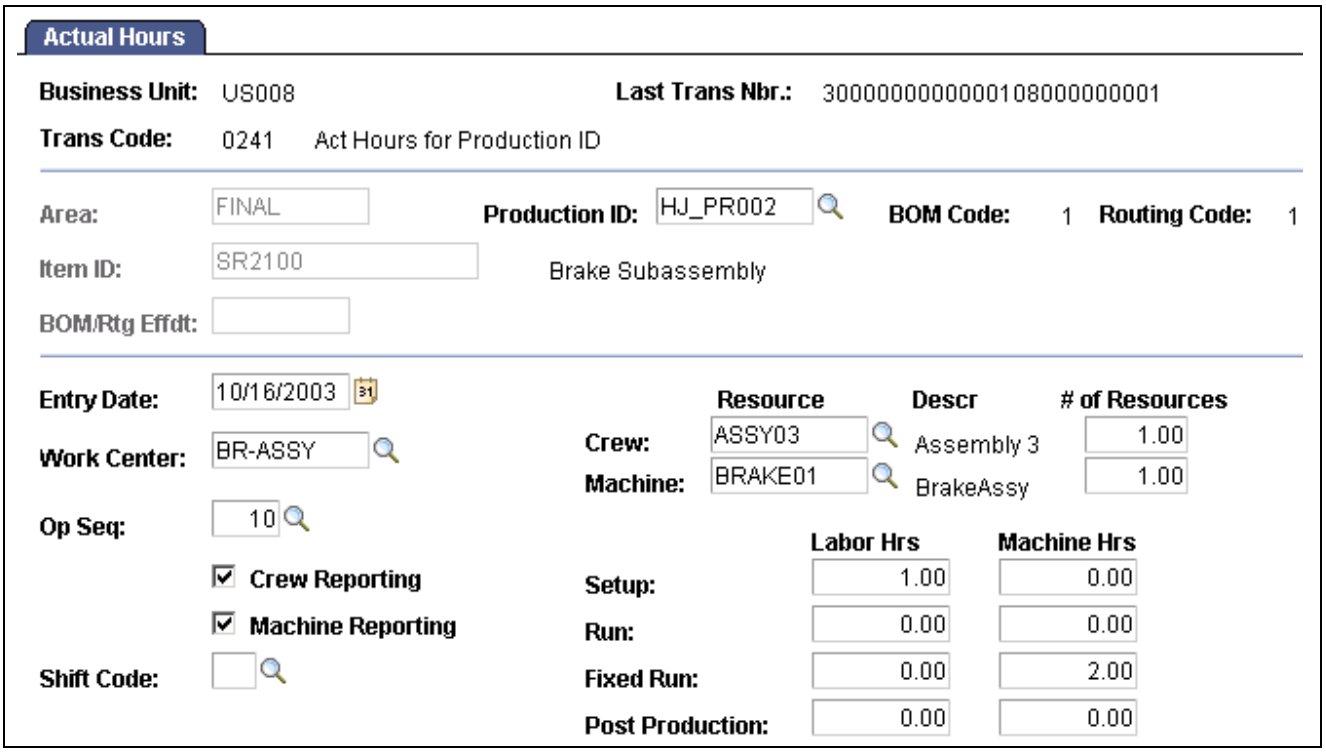

Actual Hours page (electronic data collection)

Note. You cannot 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, and **Op Seq** (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 appears.

You can, however, change the values for crews or machines.

# of Resources — Displays the number of resources for the crew and machine. 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 is 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.

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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 restart 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 process (SFPGACTH) at user-defined intervals.

See Also

Chapter 23, "Completing Operations and Recording Scrap," page 455

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CHAPTER 25

Subcontracting

This chapter provides an overview of subcontracting using PeopleSoft Manufacturing and discusses how to:

- Select subcontracted operations for purchase order creation.
- Manage purchase order changes.
- Receive end items from vendors.
- Record completed operations and scrap for subcontracted operations.
- Move completed end items.
- Complete production for subcontracted operations.
- Edit or issue components for subcontracted operations.
- Create reversing entries.
- Record 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, you select production IDs with subcontracted operations and send the information to PeopleSoft Purchasing where purchase orders are created.

  You record operation completions for both in-house and, once the end items are received back from the vendor, 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, you assign lot and serial numbers.

- You determine how much lead time you need to generate and process a purchase order for the subcontracted operation.

  Using PeopleSoft Manufacturing, you can also optionally define a subcontracted item that is a non-inventory item that represents the outside processing services. When defining this subcontracted item you can specify the purchasing attributes for this item. You can then associate this subcontracted item to the subcontracted operation. The subcontracted purchase order will then be created with this subcontracted item. You can also define a purchasing contract, such as a blanket order, for the subcontracted item to utilize the PeopleSoft Purchasing contract functionality.

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If you are using electronic data collection or enable the subcontract streamline option 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

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 458.

2. Use the Record Completions/Scrap component to make data entry corrections if required.
3. Use the Select Subcontract Production 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, and approve and dispatch the purchase order to the vendor.

   If a subcontracted item is associated with a subcontracted operation, then the purchase order will be generated with the subcontracted item and its purchasing attributes and contract information (if available) during the creation of the purchase order.

   Use the PO Stage Load, PO Calculations, PO Creation, Approve Amounts, Approve ChartFields, and Dispatch POs components in PeopleSoft Purchasing to process the subcontracted purchase order.

5. Send end items to outside vendors for subcontracted processing.
6. Receive end items back from vendors using the Receiving page in PeopleSoft Purchasing.

   See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Receiving Shipments," Processing Receipts.

7. Use the Subcontracted Receipt page to record completed subcontracted operations and scrap for the manufactured end item.
8. (Optional) Edit components.
9. Record completions and scrap for any additional in-house operations for the manufactured end item.

   See Chapter 24, "Recording Completions and Scrap Using Electronic Data Collection," page 517.

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.

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You cannot subcontract operations for configured items.

- (Optional) Specify the vendor that will be performing the operation or task.
- (Optional) Define a subcontracted item that represents the task to be done on the manufacturing end item.

Note. If you define a subcontracted item, then you must specify the subcontracted item and vendor relationship using the Purchasing Attributes - Item Vendor page.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Attributes.

- (Optional) Define queue and in-transit 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 the subcontracted operations.
- Designate components as subcontractor supplied on the BOM components page.
- Define nonowned components and locations.
- Define purchase order loader 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 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.
	Note. Subcontracted items that are processed (manufactured) by an outside vendor will also be included.
Prdn Type (production type)	The type of production: *Production, Rework,* or *Teardown.*
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.

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Selecting Subcontracted Operations for Purchase Order Creation

When part or all of the 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 or material or both to a partially completed end item.

Using the Select Subcontract Prdn for PO page in PeopleSoft Manufacturing, you 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 process (SFS5000), the system automatically transfers the subcontracted operations information for purchase order creation to PeopleSoft Purchasing, including production ID and subcontracted information (vendor name and manufactured item or subcontracted item) 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 is processed like any regular purchase order within PeopleSoft Purchasing.

To create purchase orders for subcontracted operations, verify that:

- The production ID has a status of 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 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, Subcontract Production, Subcontracted PO Report	View the status of purchase orders that you've requested for subcontracted production.
Subcontract Components Report	RUN_SFS5001	Production Control, Process Production, Subcontract Production, Subcontract Components Report	Displays the production IDs and the components associated with subcontracted operations. See Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS5001 - Subcontract Components Report, page 607.

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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. Options are:

- 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 process (SFS5000) at user-defined intervals.

Extract to PO only when prior Op Seq is complete Select this check box to ensure that the subcontract purchase order is 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 process (PO_POSTAGE).

   This process is run with the PO Stage Load page (Purchasing, Purchase Orders, Stage/Source Requests). This process 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 process (PO_POCALC).

   This process is run with the PO Calculations - Run Controls page (Purchasing, Purchase Orders, Stage/Source Requests).This is an Application Engine process that does most of the processing to create a purchase order.

3. Run the Create Purchase Orders process (PO_POCREATE).

   This process is run with the Create PO page (Purchasing, Purchase Orders, Stage/Source Requests). This is an Application Engine process that generates the purchase orders that will be staged for approval and dispatching.

   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.*
   - If the subcontracted item ID is associated to the subcontracted operation: the subcontracted item ID and its description are used
   - Quantity and unit of measure.

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- 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 if the subcontracted item ID is not associated to the subcontracted operation. Otherwise, the purchase order unit price is based on the subcontracted item's unit price from the valid contract or from the purchasing item and vendor relationship.

4. Once you've created the purchase orders, you must approve and dispatch them before you can send the purchase order to the vendor.

   Use the Amount Approval, ChartField Approval, and Dispatch POs components 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 607

Managing Purchase Order Changes

Sometimes you may need to change a 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 that 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 may also need to change the purchase order when any end items have been returned from the vendor as scrap.

If a subcontracted operation has more than one purchase order, the system will not automatically create change requests. You will need to manually create the change requests.

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 is processed by PeopleSoft Purchasing using the Change Load Application Engine process (PO_CHNGLOAD) and the Change Purchase Order Application Engine process (PO_POCHNG).

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.

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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 the purchasing department to reschedule the purchase order.

If multiple subcontracted purchase orders exist for the same subcontracted operation, no change order requests will be created from PeopleSoft Manufacturing.

Canceling or Deleting a Subcontracted Purchase Order

If you cancel or delete the subcontracted PO, line, or schedule, the system resets the subcontracted purchase order status for the associated production ID or operation sequences associated with the purchase order, line, or schedule. Therefore, you need to rerun the process to generate a subcontracted purchase order.

Receiving End Items from Vendors

Receiving the end items back from the vendor is a two-step process, but the process can be streamlined so that it is only one step. The process to receive the end items using the two-step process is:

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.

If you setup subcontract streamlining in PeopleSoft Purchasing, then the process to receive end items is that the Receiving functionality records the receipt of the end items back from the vendor. Upon saving the receipt the system will perform the purchase order receipt and the production ID completion in one step by automatically generating electronic data collection transactions for the subcontracted completions data. To specify that you want to use subcontracting streamlining, select the Interface Receipt and Subcontract Streamline check boxes on the Maintain Receipts - Receiving page.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, “Receiving Shipments,” Managing Receipts.

Once the vendor has completed the subcontracted work, the end items are returned to Receiving. To receive end items back from the subcontractor, use the Maintain Receipts - Receiving 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:

Return for Replacement Return the end item to the vendor with the expectation that it will be replaced. The return quantity is equal to the reject quantity with a reject action of *Return to Replacement.*

The received rejected quantity for production is the received quantity and the received rejected quantity is zero.

PeopleSoft Purchasing does 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.

PeopleSoft Purchasing records the Reject quantity as scrap on the production Subcontracted Receipt page.

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This table summarizes the receiving reject actions and effects:

Action	Receiving Record	PS_RECV_SUBREC_MG	Purchase Order 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 manufactured end items automatically record the subcontracted completions data. You do not 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 might include a quality manager or a production control manager.

If you are integrating with a Manufacturing Execution System (MES), you can receive subcontracted operation completions from the MES to the PeopleSoft system. 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.

Note. If you have set up your environment to perform subcontract streamlining then the recording of subcontracted operations is unnecessary.

See Also

Chapter 23, "Completing Operations and Recording Scrap," Integrating PeopleSoft Manufacturing with a Third-Party System, page 461

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, "Understanding SCM Integration"

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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	SF_COMPL_ID	Production Control, Process Production, Complete Production, Record Completions/Scrap	(Optional) 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/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.

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Page Name	Object Name	Navigation	Usage
Rapid Serial Numbers	AUTO_SERIAL_WRK	Production Control, Process Production, Complete Production, Record Completions/Scrap Click the Generate Serial IDs link.	(Optional) 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	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Complete Production, Record Completions/Scrap, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) 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.
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.

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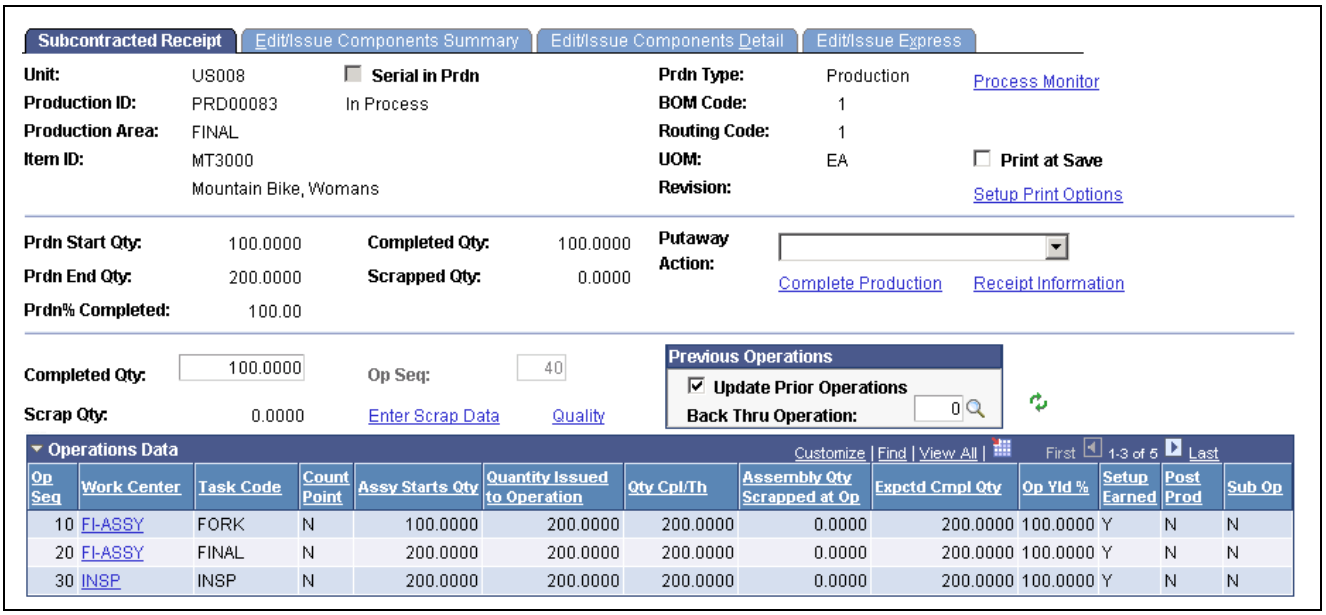

Subcontracted Receipt page

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 this link to initiate a data entry session and to access either the Data Entry - Subgroup Method page or the Data Entry - Sample Method page in PeopleSoft Quality, depending on the data entry method that 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 Enterprise Quality 9.0 PeopleBook, "Collecting Quality Data"

Reviewing Subcontract Receipt Information

Access the Receipt Information page.

Recv Rejected Qty (received rejected quantity) Displays the quantity that Receiving rejected from the vendor and that was recorded in PeopleSoft Purchasing. Receiving assigns one of these indicators to the rejected quantity:

- *Return for Replacement*
- *Return for Credit*

Only received quantities that have a status of *Return for Credit* appear in this field.

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Prdn Accepted Qty (production accepted quantity) — Displays the quantity that was actually recorded as a completion using the Subcontract Receipt page.

Prdn Rejected Qty (production rejected quantity) — Displays 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 the 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 477.

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Pages Used to Move Completed End Items

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 to the process for other production.

See Chapter 23, “Completing Operations and Recording Scrap,” Running the Completions Update COBOL/SQR Process (SFPDCDRV), page 504.

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Pages Used to Complete Production 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 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 493.

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	SF_EDIT_COMPS_EXPR	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Edit/Issue Express	(Optional) Select lot- or serial-controlled components that have pending issue or pending loss quantities.

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Page Name	Object Name	Navigation	Usage
Lot/Serial Number Selection	SF_ED_CMP_SBP_GRD	Production Control, Process Production, Subcontract Production, Receive Subcontract Assembly, Edit/Issue Express Click the Select Lot/Serial link.	(Optional) Select the lot or serial numbers (or both) 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, 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.

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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 the 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 eight end items at operation 20, but only six 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:

- Rebalances the completions or scrap count.
- Rolls back the reversing entry only through the subcontracted operation.
- Automatically returns any components that were consumed at the current operation to the appropriate WIP location.
- Creates 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 477

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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	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.	(Optional) Select the serial numbers of the serial-controlled components to be returned.
Lot/Serial Number Selection scroll area	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.	(Optional) Identify the lots from which you want to return lot-controlled components.

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Recording and Viewing 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 525.

Pages Used to Record and View Actual Labor and Machine Hours

Page Name	Object Name	Navigation	Usage
Production Selection	SF_ACTHR_SELECTION	Production Control, Process Production, Complete Production, Record Actual Hours, Production Selection	Select the 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 the 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 resource details for the crew or machine.

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CHAPTER 26

Closing Production

This chapter provides an overview of the production close process and discusses how to:

- Analyze potential variances.
- Initiate the Close Production process (SFS1100).
- Reopen production.

Understanding the Production Close Process

After you've completed production, you will close production and calculate variances for postings to the general ledger. You will also 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 no variances are posted.

Periodically, you can review this report to highlight the variances immediately so that 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 581

Analyzing Potential Variances

After completing production, use the Potential Production Variance report to view potential variances that exist in production.

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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 before 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 598

Initiating the Close Production Process

After you complete production for the day or for a production ID, you need to close production to any further material or labor transactions. The production status is changed to *Closed for Accounting* after all related transactions have been completed and potential variances have been analyzed. When the final close for production (the accounting close) occurs, 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 or 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.

After it is closed for accounting purposes, PeopleSoft Manufacturing calculates these variances:

- Configuration Yield Loss.
- Material Usage.

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- Component Yield.
- Lot Size (for material, labor, and machine).
- Routing Process.
- Rework.
- Teardown.
- Outside Processing Variance.
- Mix Variance.
- Operation Yield Variance.

Production schedules with a status of *In Process* 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 Enterprise Cost Management 9.0 PeopleBook, "Analyzing Manufacturing"

Appendix A, "Delivered Workflows for PeopleSoft Manufacturing," page 581

Pages Used to Initiate 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 options:

- Production ID
- Production area
- Item ID

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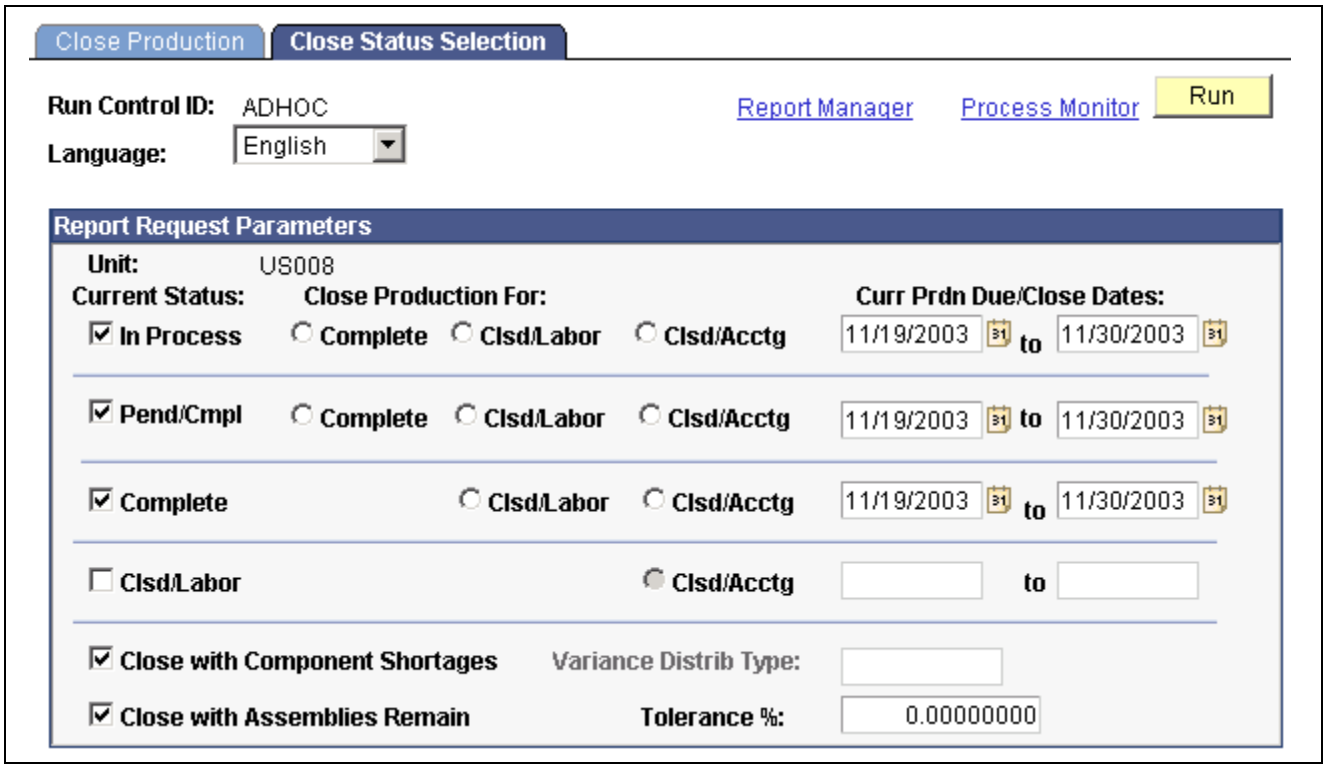
All or a Range Narrow the production to close by combining any of these options. For example, you can close only those production IDs within a selected production area for a single item.

Select Production Schedules Select this check box to close production schedules based on:

- Production area
- Item ID

Defining Closing Production Criteria

Access the Close Status Selection page.



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)

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Curr Prdn Due/Close Dates (current production due and close dates)

Enter the appropriate date ranges. If you are 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) Displays the variance distribution type, which 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) appears, 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 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 percent, this production ID will not close because the quantity remaining to be completed is 8 percent of the order quantity. The default is 0 percent.

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 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 orders 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 cannot close a production ID or a production schedule quantity that falls within the selection criteria, the production ID, area, item, and day shift information display 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.

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- Outstanding consumed quantity.

  In this instance, a component was consumed during a backflush, but there was not 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 nonzero 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 cannot 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 percentage, the production ID or production schedule will not be closed. For example, if you have an order quantity of 100, 80 of which are completed, and you enter a tolerance of 5 percent, production will not be closed because at least 95 assemblies must be completed.

- Subcontracted purchase order quantity outstanding.

  If the quantity of assemblies sent to the vendor is not equal to the quantity of scrapped and completed assemblies received back from the vendor, then you cannot 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 that you cannot 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 (that is, 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 that 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.

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See Also

PeopleSoft Enterprise Cost Management 9.0 PeopleBook, "Analyzing Manufacturing"

Appendix B, "PeopleSoft Manufacturing Report Descriptions," SFS1100 - Production Close Report, page 598

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 *Pending Complete* 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 600

Defining Additional Reopen Production Criteria

Access the Reopen Status Selection page.

Current Status Select a current production status for the production that you want to reopen.

Curr Prdn Due/Close Dates (current production due and 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

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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 process (SFS1200) 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 600

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CHAPTER 27

Archiving and Purging Production Data

This chapter provides overviews of the production archive and purge process (SF_PURGE) and the ramifications of archiving and purging production data and discusses how to:

- Enter parameters to archive or purge production data.
- Select archive parameters.

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 these points 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 these 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

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer

Chapter 27, "Archiving and Purging Production Data," Understanding the Ramifications of Archiving and Purging Production Data, page 557

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Archiving and Purging Production Data

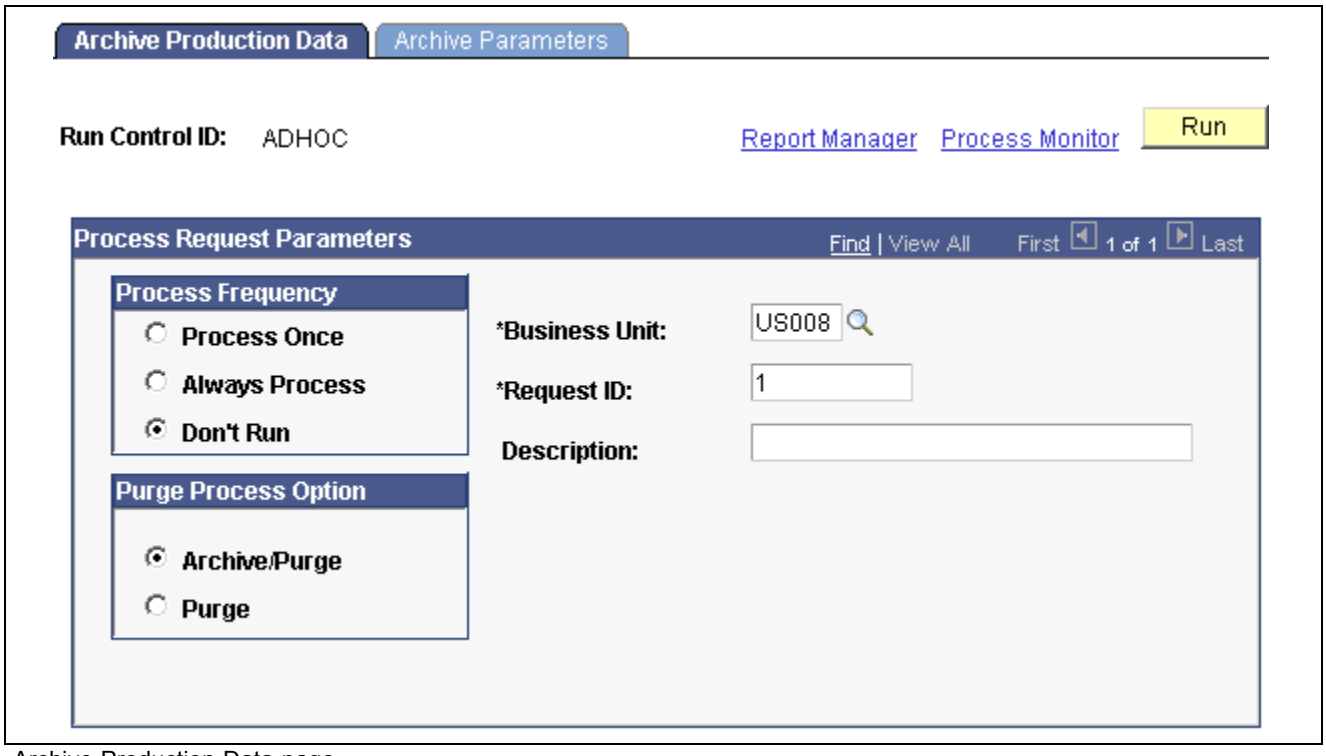
Once you have completed production, determine if you want to move or purge production data.

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 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.

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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 *due* date.

Warning! The purging function is 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.

Understanding the Ramifications of Archiving and Purging Production Data

Keep these points in mind when you determine which production data you want to archive or purge:

- For production ID splits, if you purge this data, you will not be able to see the split history.
- For 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.
- For accounting line drilldowns, you must make sure that the accounting lines are posted to the journal entry before purging this data.

  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 345

PeopleSoft Enterprise Product Configurator 9.0 PeopleBook, "Using PeopleSoft Enterprise Product Configurator"

PeopleSoft Enterprise Cost Management 9.0 PeopleBook, "Costing Transactions and Creating Accounting Entries"

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CHAPTER 28

Understanding Scheduling Operations

This chapter discusses:

- Production scheduling in PeopleSoft Manufacturing.
- Examples of production scheduling.

Production Scheduling in PeopleSoft Manufacturing

In PeopleSoft Manufacturing, you can maintain the schedule for production using the PeopleSoft Manufacturing scheduling algorithms or PeopleSoft Supply Planning solvers. Although the PeopleSoft Supply Planning solvers use production data from PeopleSoft Manufacturing to create and maintain a production plan, the production plan 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 does 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 is not exceeded in any one day.

Although it is recommended that you use the PeopleSoft Supply Planning 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 the 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.

Factors Affecting Scheduling with PeopleSoft Manufacturing

If you are using PeopleSoft Manufacturing to schedule production, in addition to planned lead times, these factors affect the actual start date and time and the actual due date and time of each operation:

- Operation overlap, based on a percentage or send ahead quantity.
- Whether setup can occur during queue time or at any time after production begins.
- Whether setup time is included in scheduling the operation.
- Operation intensity.

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- 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 cannot 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 *Firmed* or *Released* status when an operation list is 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 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, production dates and actual dates are the same. If you have production shifts that span two days, the actual date for production may be different from the production date. The system determines an actual date by the actual time that a production is scheduled to start or end within the production shift.

Defining Production Scheduling Methods

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 the due date and time, it is backward scheduled.

  In this case, the system calculates the actual start 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 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 determined.

PeopleSoft Manufacturing *always* backward schedules production schedules. When adding a new production schedule, you 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 that it's modified.

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Factors Affecting Scheduling with PeopleSoft Supply Planning

PeopleSoft Supply Planning considers several factors when determining the actual start and due date and time of production, teardown, or rework orders, as well as the actual start date and time and actual due date and 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 *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. When the routing is 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 Supply Planning PeopleBook

Examples of Production Scheduling

The following examples illustrate how PeopleSoft Manufacturing creates and maintains operation schedules. These examples illustrate how the system calculates actual start and due dates and times for different operations using forward and backward scheduling.

Note. These examples assume that you are not using the PeopleSoft Supply Planning solvers to schedule production.

The examples use these types of shop floor operations:

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- Example 1: Operations with no overlap; queue and setup are done sequentially.
- Example 2: Operations with no overlap; queue and setup are done concurrently; queue time is less than setup time.
- Example 3: Operations with no overlap, queue and setup are done concurrently; setup time is less than queue time.
- Example 4: Operations with no overlap; setup is not included.
- Example 5: Operation overlap; queue and setup are done sequentially.

These production times are used for all examples:

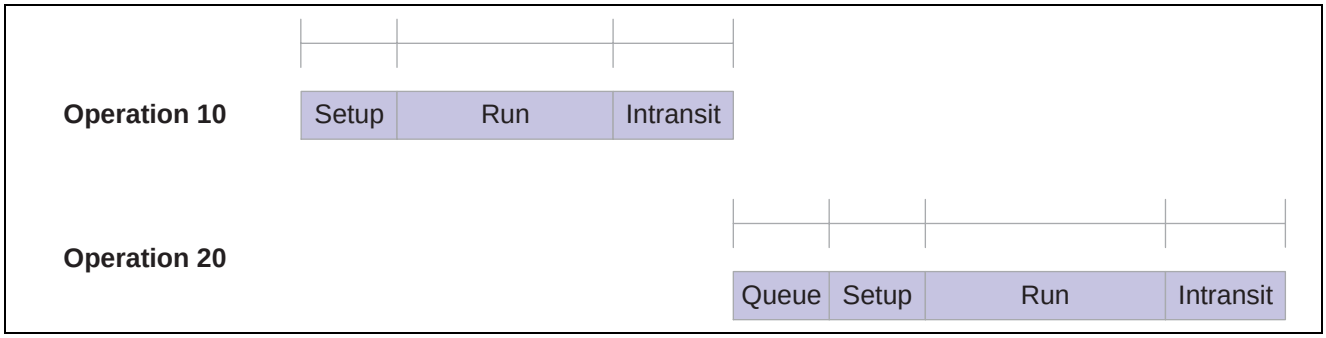
Op	Queue	Setup	Run	Intransit	Overlap
10	None	1 hour	5 hours (.5 hr/unit)	2 hours	None
20	1 hour	3 hours	10 hours (1 hr/unit)	1 hour	None

Note. Even though PeopleSoft Manufacturing calculates start and due dates 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 an 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 one hour, and setup time is three 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.

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Forward Scheduling Calculations

Production ID Start Date and Time = Day 1, 8:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the first operation (Operation 10):

Step	To Calculate	Use	Notes
1	Operation 10 start date and time.	Production ID's start date and time.	This calculation assumes that queue cannot occur at the first operation.
2	Operation 10 run start date and time.	Operation start date and time + setup time.	None.
3a or	Operation 10 run time (time and unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.
3b	Operation 10 run time (units/time).	Operation start quantity and run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 10 due date and time.	Run start date and time + run time.	None.

This table lists the steps that you take to calculate start and due dates and times for the second operation (Operation 20):

Step	To Calculate	Use	Notes
1	Operation 20 start date and time.	Previous operation's (Operation 10) due date and time + previous operation's in transit time + current operation's queue time.	None.
2	Operation 20 run start date and time.	Current operation start date and time + setup time.	None.
3a, or	Operation 20 run time (time and unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.

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Step	To Calculate	Use	Notes
3b	Operation 20 run time (units/time).	Operation start quantity and run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 20 due date and time.	Current operation run start date and time + run time.	If you have a schedule with more than two operations, repeat steps 1 through 4 in this table until all subsequent operation due dates and times are calculated.

Backward Scheduling Calculations

Production ID Due Date and Time = Day 2, 6:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the last operation (Operation 20):

Step	To Calculate	Use	Notes
1	Operation 20 due date and time.	Production ID's due date and time − current operation's in transit time.	None.
2a, or	Operation 20 run time (time and unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the 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 the run rate is in terms of units per time unit.
3	Operation 20 run start date and time.	Current operation's due date and time − run time.	None.
4	Operation 20 start date and time.	Current operation's run start date and time − setup time.	None.

This table lists the steps that you take to calculate start and due dates and times for the prior operation (Operation 10):

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Step	To calculate	Use	Notes
1	Operation 10 due date and time.	Subsequent operation's (Operation 20) start date and time − subsequent operation's queue time − current operation's in transit time.	None.
2a, or	Operation 10 run time (time/unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.
2b	Operation 10 run time (units and time).	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.
3	Operation 10 run start date and time.	Current operation's due date and time − run time.	None.
4	Operation 10 start date and time.	Current operation's run start date and time − setup time.	If you have a schedule with more than two operations, repeat steps 1 through 4 in this table until all previous operation due dates and 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:

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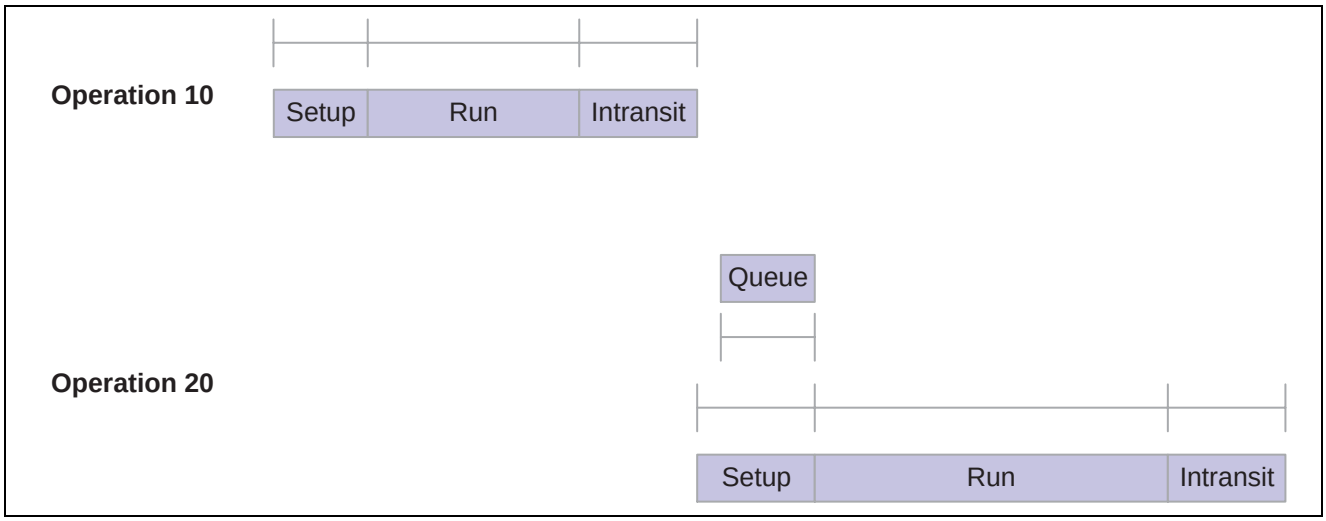

Example 2: Queue time is one hour, and setup time is three hours

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 and Time = Day 1, 8:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the first operation (Operation 10):

Step	To Calculate	Use	Notes
1	Operation 10 start date and time.	Production ID's start date and time.	This calculation assumes that queue doesn't occur at the first operation.
2	Operation 10 run start date and time.	Operation start date and time + setup time.	None.
3a, or	Operation 10 run time (time/unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.

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Step	To Calculate	Use	Notes
3b	Operation 10 run time (units and time).	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 10 due date and time.	Run start date and time + run time.	None.

This table lists the steps that you take to calculate start and due dates and times for the second operation (Operation 20):

Step	To Calculate	Use	Notes
1	Operation 20 start date and time.	Previous operation's (Operation 10) due date and time + prior operation's in transit time.	This calculation assumes that queue time is less than setup time.
2	Operation 20 run start date and time.	Current operation start date and time + setup time.	None.
3a, or	Operation 20 run time (time/unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.
3b	Operation 20 run time (units and time).	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 20 due date and time.	Current operation run start date and time + run time.	If you have a schedule with more than two operations, repeat steps 1 through 4 in this table until all subsequent operation due dates and times are calculated.

Backward Scheduling Calculations

Production ID Due Date and Time = Day 2, 5:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the last operation (Operation 20):

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Step	To Calculate	Use	Notes
1	Operation 20 due date and time.	Production ID's due date and time − current operation's in transit time.	None.
2a, or	Operation 20 run time (time/unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.
2b	Operation 20 run time (units and time).	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.
3	Operation 20 run start date and time.	Current operation's due date and time − run time.	None.
4	Operation 20 start date and time.	Current operation's run start date and time − setup time.	None.

This table lists the steps that you take to calculate start and due dates and times for the prior operation (Operation 10):

Step	To Calculate	Use	Notes
1	Operation 10 due date and time.	Subsequent operation's (Operation 20) start date and time − current operation's in transit time.	This calculation assumes that queue time is less than setup time.
2a, or	Operation 10 run time (time/unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.
2b	Operation 10 run time (units and time).	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.

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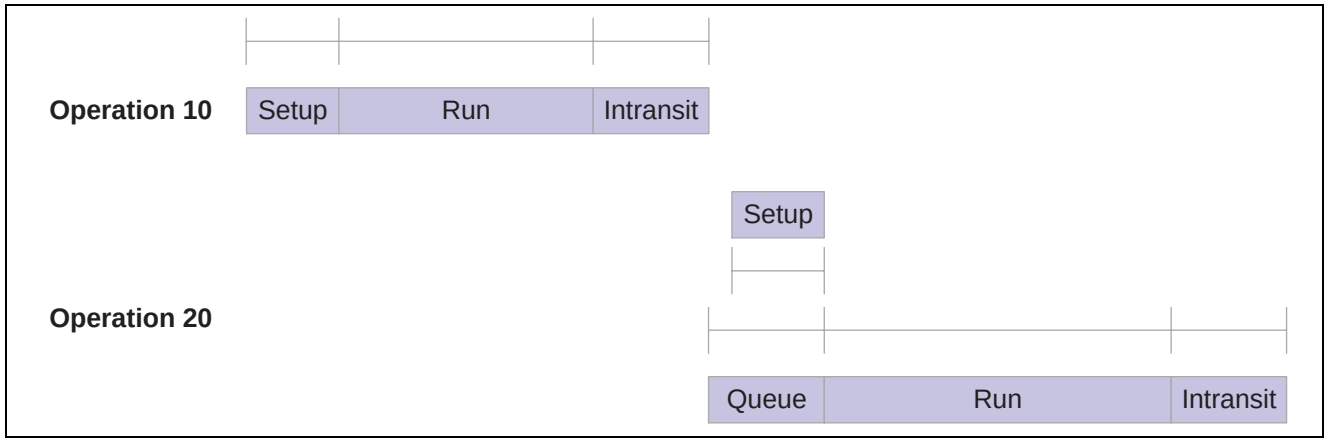
Step	To Calculate	Use	Notes
3	Operation 10 run start date and time.	Current operation's due date and time − run time.	None.
4	Operation 10 start date and time.	Current operation's run start date and time − setup time.	If you have a schedule with more than two operations, repeat steps 1 through 4 in this table until all previous operation due dates and 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 three hours and setup takes one 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 and Time = Day 1, 8:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the first operation (Operation 10):

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Step	To Calculate	Use	Notes
1	Operation 10 start date and time.	Production ID's start date and time.	This calculation assumes that queue doesn't occur at the first operation.
2	Operation 10 run start date and time.	Operation start date and time + setup time.	None.
3a, or	Operation 10 run time (time/unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.
3b	Operation 10 run time (units and time).	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 10 due date and time.	Run start date and time + run time.	None.

This table lists the steps that you take to calculate start and due dates and times for the second operation (Operation 20):

Step	To Calculate	Use	Notes
1	Operation 20 start date and time.	Prior operation's (Operation 10) due date and time + prior operation's in transit time + (queue − setup time of current operation).	This calculation assumes that setup time is less than queue time.
2	Operation 20 run start date and time.	Current operation start date and time + setup time.	None.
3a or	Operation 20 run time (time/unit).	Operation start quantity × run rate (converted to hours) + fixed run (converted to hours).	Use this calculation if the run rate is in terms of time per unit.

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Step	To Calculate	Use	Notes
3b	Operation 20 run time (units and time).	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 20 due date and time.	Current operation run start date and time + run time.	If you have a schedule with more than two operations, repeat steps 1 through 4 in this table until all subsequent operation due dates and times are calculated.

Backward Scheduling Calculations

Production ID Due Date and Time = Day 2, 5:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the last operation (Operation 20):

Step	To Calculate	Use	Notes
1	Operation 20 due date and time	Production ID's due date and 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 the run rate is in terms of time per unit.
2b	Operation 20 run time (units and time)	Operation start quantity/ run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of units per time unit.
3	Operation 20 run start date and time	Current operation's due date and time - run time	None.
4	Operation 20 start date and time	Current operation's run start date and time - setup time	None.

This table lists the steps that you take to calculate start and due dates and times for the prior operation (Operation 10):

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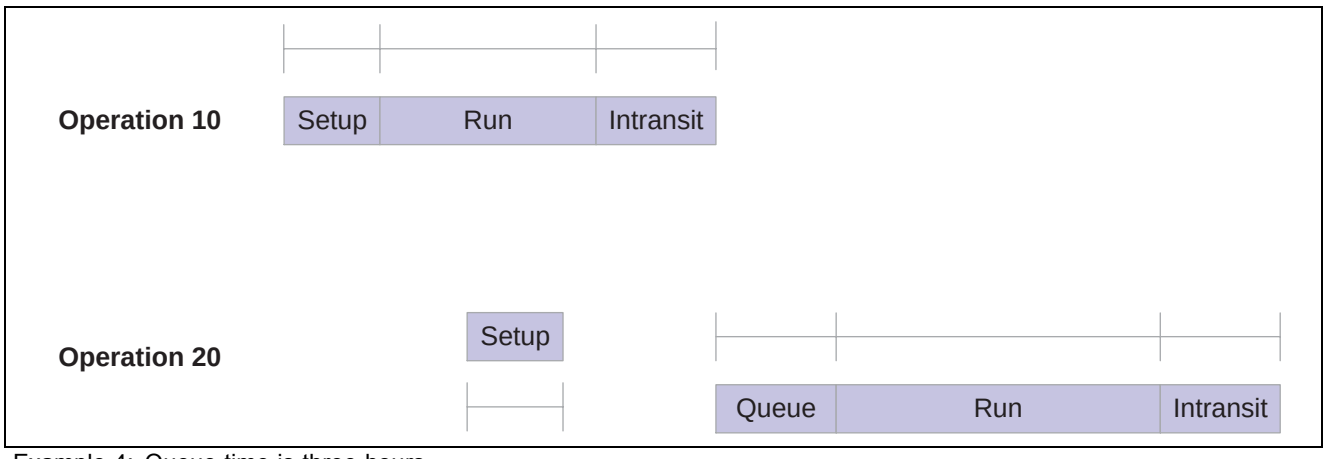
Step	To Calculate	Use	Notes
1	Operation 10 due date and time	Subsequent operation's (Operation 20) start date and time - (queue time - setup time of subsequent operation) - current operation's intransit time	This calculation assumes that setup time is less than queue time.
2a, or	Operation 10 run time (time/unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of time per unit.
2b	Operation 10 run time (units and time)	Operation start quantity/ run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of units per time unit.
3	Operation 10 run start date and time	Current operation's due date and time - run time	None.
4	Operation 10 start date and time	Current operation's run start date and 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 and times are calculated.

Example 4

This example uses operations with no overlap. The setup is not included:



Example 4: Queue time is three hours

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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 and Time = Day 1, 8:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the first operation (Operation 10):

Step	To Calculate	Use	Notes
1	Operation 10 start date and time	Production ID's start date and time	This calculation assumes that queue doesn't occur in the first operation.
2	Operation 10 run start date and time	Operation start date and 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 the run rate is in terms of time per unit.
3b	Operation 10 run time (units and time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 10 due date and time	Run start date and time + run time	None.

This table lists the steps that you take to calculate start and due dates and times for the second operation (Operation 20):

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Step	To Calculate	Use	Notes
1	Operation 20 start date and time	Prior operation's (Operation 10) due date and time + prior operation's intransit time + current operation's queue time - current operation's setup time	This calculation assumes that setup can be completed any time after the first operation run has started. The start date and time represent the latest possible time that you should begin setup.
2	Operation 20 run start date and time	Current operation start date and time + setup time	None.
3a, or	Operation 20 run time (time and unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of time per unit.
3b	Operation 20 run time (units/time)	Operation start quantity and run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 20 due date and time	Current operation run start date and 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 and times are calculated.

Backward Scheduling Calculations

Production ID Due Date and Time = Day 2, 3:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the last operation (Operation 20):

Step	To Calculate	Use	Notes
1	Operation 20 due date and time	Production ID's due date and time - current operation's intransit time	None.
2a, or	Operation 20 run time (time and unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of time per unit.

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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 the run rate is in terms of units per time unit.
3	Operation 20 run start date and time	Current operation's due date and time - run time	None.
4	Operation 20 start date and time	Current operation's run start date and time - setup time	This calculation assumes that setup can be completed any time after the first operation run has started. The start date and time represent the latest possible time that you should begin setup.

This table lists the steps that you take to calculate start and due dates and times for the prior operation (Operation 10):

Step	To Calculate	Use	Notes
1	Operation 10 due date and time	Subsequent operation's (Operation 20) start date and time - subsequent operation's queue time - current operation's intransit time	The run start date and time is used and setup is not 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 the run rate is in terms of time per unit.
2b	Operation 10 run time (units and time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of units per time unit.

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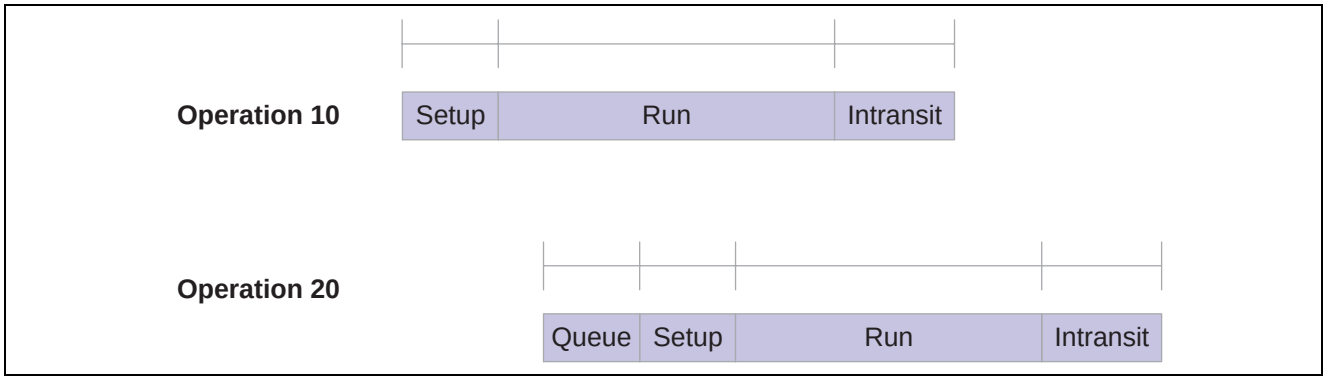
Step	To Calculate	Use	Notes
3	Operation 10 run start date and time	Current operation's due date and time - run time	None.
4	Operation 10 start date and time	Current operation's run start date and time - setup time	If you have a schedule with more than two operations, repeat steps 1-4 in this table until all prior operation due dates and times are calculated.

Example 5

In this example the operations overlap. The queue and setup are done sequentially.

Assume that 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 that all units are available for processing at the start of the run or soon after:



Example 5: 80 percent 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 and Time = Day 1, 8:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the first operation (Operation 10):

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Step	To Calculate	Use	Notes
1	Operation 10 start date and time	Production ID's start date and time	This calculation assumes that queue doesn't occur in the first operation.
2	Operation 10 run start date and time	Operation start date and 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 the run rate is in terms of time per unit.
3b	Operation 10 run time (units and time)	Operation start quantity / run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the run rate is in terms of units per time unit.
4	Operation 10 due date and time	Run start date and time + run time	None.

This table lists the steps that you take to calculate start and due dates and times for the second operation (Operation 20):

Step	To Calculate	Use	Notes
1a, or	Operation 20 start date and 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 and 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 and time	Current operation start date and time + setup time	None.

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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 the 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 the run rate is in terms of units per time unit.
4	Operation 20 due date and time	Current operation run start date and 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 and times are calculated.

Backward Scheduling Calculations

Production ID Due Date and Time = Day 2, 2:00 a.m.

This table lists the steps that you take to calculate the start and due date and times for the last operation (Operation 20):

Step	To Calculate	Use	Notes
1	Operation 20's due date and time	Production ID's due date and 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 the 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 the run rate is in terms of units per time unit.
3	Operation 20 run start date and time	Current operation's due date and time - run time	None.
4	Operation 20 start date and time	Current operation's run start date and time - setup time	None.

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This table lists the steps that you take to calculate start and due dates and 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 and time, when operation overlap is expressed as a percentage	Subsequent operation's (Operation 20) start date and 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 the 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 the run rate is in terms of units per time unit.
3	Operation 10 run start date and time	Current operation's due date and time - run time	None.
4	Operation 10 start date and time	Current operation's run start date and 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 and times are calculated.

This table lists the steps that you take to calculate start and due dates and 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 and time, when operation overlap is expressed as a send ahead quantity	Subsequent operation's (Operation 20) start date and time - current operation's intransit time - subsequent operation's queue time + [current operation's run time x (Operation start quantity - send ahead quantity)]	None.

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Step	To Calculate	Use	Notes
2a, or	Operation 10 run time (time and unit)	Operation start quantity x run rate (converted to hours) + fixed run (converted to hours)	Use this calculation if the 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 the run rate is in terms of units per time unit.
3	Operation 10 run start date and time	Current operation's due date and time - run time	None.
4	Operation 10 start date and time	Current operation's run start date and 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 and times are calculated.

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APPENDIX A

Delivered Workflows for PeopleSoft Manufacturing

This appendix discusses delivered workflows for PeopleSoft Manufacturing.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology

Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications

Chapter 4, “Establishing Production Calendars,” page 41

Chapter 8, “Maintaining Bills of Material,” page 89

Chapter 13, “Maintaining Tasks,” page 209

Chapter 12, “Defining Work Centers,” page 193

Chapter 14, “Structuring Routings,” page 221

Chapter 18, “Maintaining Production Orders and Production Schedules,” page 311

Chapter 22, “Issuing Material to Production,” page 417

Chapter 23, “Completing Operations and Recording Scrap,” page 455

Chapter 26, “Closing Production,” page 547

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

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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 engineer 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

This section discusses the Identify Production with Pending Quantities workflow.

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Description

Event Description	Runs the PeopleSoft Application Engine SF_WFPRDCMP process.
Action Description	Notifies the production supervisor that there is nonzero quantity in the pending issue quantity or pending loss quantity fields of a component.
Notification Method	Worklist

Workflow Objects

Event	SF_PRDN_PENDQTYS
Workflow Action	SF Prdn Comp Pending Qty
Role	Production Supervisor

Potential Prdn Variance Report

This 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

This 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.

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Workflow Objects

Event	Calendar Notification
Workflow Action	Prdn Calendar
Role	Planner

Production ID Change

This section discusses the Production ID Change workflow.

Description

Event Description	A production ID is changed 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

This section discusses the Production Ready to Close workflow.

Description

Event Description	Runs the 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

This section discusses the Replenishment Notification workflow.

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Description

Event Description	Inventory reaches a minimum quantity during backflush, completions, or editing and issuing components.
Action Description	Notifies the 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

This 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

This 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

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Workflow Objects

Event	Task Change Notification
Workflow Action	Task Change Notification
Role	Manufacturing Engineer

Work Center Calendar Code Change

This section discusses the Work Center Calendar Code Change workflow.

Description

Event Description	Changes 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

This 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

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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

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

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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 based 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

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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

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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

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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 Firmed, Released, In Process, Pending Complete, Complete, Closed for Labor, and Closed to Accounting.	Production Control, Define Production, Reports, Component Where Used Report	RUN_SFS2006

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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 Firmed, 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
SFS5001 Subcontract Components Report	Lists the production IDs and the components associated with subcontracted operations.	Production Control, Process Production, Subcontract Production, Subcontract Components Report	RUN_SFS5001
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.

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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.

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- 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.

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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.

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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:

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- 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.

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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:

- *Components:* Searches to see if the items are specified as a component on a BOM.
- *Substitutes:* Searches to see if the items are substitute items on a BOM.
- *Outputs:* Searches to see if the items are substitute items on a BOM.
- *All:* Searches to see whether items are components or substitutes.
- *Range:* 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)

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- Prdn Area (production area)
- Item ID

Allor 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 percent of 5, this production ID won't close because the quantity remaining to be completed is 8 percent of the order quantity. The default is 0 percent. The system closes any

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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:

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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:

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- 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.

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Print Bar Coded Control Flags Select this check box to print bar code control flag information.

Note. If the reports are not printing bar codes as requested, check the SETENV.SQC file to make sure the 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:

- *Start Date:* 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.

- *Due Date:* 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.

- *Past Due Report:* 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 the 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.

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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 *Ready for Printing*. 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 *Ready for Printing* and *Printed.*

Reprints Only — Print production documents for every production ID within the range with a production document status of *Printed.*

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:

- *Item*
- *Prdn Area* (production area)
- *Prdn ID* (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 the reports are not printing bar codes as requested, check the SETENV.SQC file to make sure the PRINTER_TYPE environmental variable is set correctly.

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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:

- *Due Date*
- *Item*
- *Prdn Area* (production area)
- *Prdn Due Date* (production due date)
- *Prdn Start Date* (production start date)
- *Start Date*

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:

- *Entered*
- *Firmed*
- *Released*
- *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 IDsand **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.

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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:

- *Prdn Start* (production start). Select production based on start dates.
- *Prdn Due* (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:

- *Item*
- *Prdn Area* (production area)
- *Prdn ID* (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:

- *Firmed*
- *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:

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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:

- *Item ID*
- *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*

SFS5001 - Subcontract Components Report

This report displays the production IDs and the components associated with subcontracted operations.

The Subcontract Components Report page includes:

Selection Criteria

Unit Select a specific PeopleSoft Manufacturing business unit. This is a required field.

Select any of these optional fields. If you leave the fields blank, the system retrieves all applicable information:

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All or **Range** Select either option for one of these fields:

- Op Start Dt (operation start dates)
- Prdn ID (production IDs)
- Operation Sequence: Select the specific subcontracted operation for the component or leave the field blank to retrieve all subcontracted operation sequences associated with the production ID.
- Prdn Area (production area)
- Item ID
- Vendor ID: Select the specific subcontracted vendor or leave the field blank to return all appropriate production IDs and associated subcontracted operations based on other selection criteria.

Issue Method Selection

Select the issue method for the subcontacted components. Values are:

- Kit
- Issue
- Replenishment

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 the selection by any of the 4 location levels set up in the inventory. If you selected a range of production areas, you can't select a range of WIP locations.

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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 the 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.

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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.

Viewing Standard Financial Reports

:

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Application Fundamentals Reports".

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Glossary of PeopleSoft Enterprise 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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise 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 Enterprise 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.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft Enterprise 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 Enterprise 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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise 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."

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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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise 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 process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

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 Enterprise 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.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise 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.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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 Enterprise 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 Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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 *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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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, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise 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.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise 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 Enterprise. 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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

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 Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. 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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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.

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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 Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). 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.

detailed business process

A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension

In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt

Items shipped from a warehouse or vendor to another warehouse.

direct ship

Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree

In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division

In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

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 Enterprise 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 Enterprise 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 *Enterprise Incentive Management ledger.* 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.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise 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 Enterprise 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.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise 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 Enterprise 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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

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.

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fund In PeopleSoft Enterprise 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.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

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, and user interaction objects.

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incentive rule In PeopleSoft Enterprise 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 Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise 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.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* 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.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise 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.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

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 *rates*) 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.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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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.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise 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 *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise 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.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise 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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise 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.

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meta-SQL Meta-SQL constructs expand into platform-specific 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 Metastrings are special expressions included in SQL string literals. The metastrings, 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 Enterprise 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 Enterprise 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.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

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 Enterprise and non-PeopleSoft Enterprise 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 *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise 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.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure 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.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise 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 Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise 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.

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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 A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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 *record input value-added tax flag.* Within PeopleSoft Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

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 Enterprise 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.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

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.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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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.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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 Enterprise 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.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise 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.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

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.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise 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 Enterprise 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.

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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 *basis* 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 Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

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.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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 Enterprise 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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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 *value-added tax exception.* 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 *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise 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 link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* 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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