



JD Edwards World

Shop Floor Control – Discrete Guide

Version A9.1

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JD Edwards World
Shop Floor Control - Discrete Guide

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Contents

1 Overview

Overview to Shop Floor Control – Discrete	1-1
System Integration.....	1-2
Features	1-3
Process Flow	1-6
Tables for Shop Floor Control.....	1-7
Types of Manufacturing.....	1-9
Enterprise Requirements Planning and Execution System.....	1-9
Sales Order Management System.....	1-11
Procurement System.....	1-12
Menu Overview	1-14

2 Discrete Manufacturing

Overview to Discrete Manufacturing	2-1
About Discrete Manufacturing	2-1
Understand Work Orders Overview.....	2-5
About Work Orders.....	2-5
What Happens When You Attach a Parts List?	2-7
When Do You Attach Routing Instructions?.....	2-9
How Does the System Calculate the Start Date?	2-11
What Is Shop Paperwork?	2-12
What Is Backscheduling?	2-12
Blending, Filling, and Packaging.....	2-14
Create Work Orders.....	2-15
Creating Work Orders.....	2-15
Entering Work Order Headers.....	2-15
Attaching the Parts List Interactively.....	2-28
Attaching the Routing Instructions Interactively	2-39
Assigning Serial Numbers.....	2-46
Process Work Orders.....	2-49
Processing Work Orders	2-49
Run Order Processing	2-52

Printing a Summary of Work Orders	2-53
Understand Commitments Overview	2-55
About Commitments	2-55
Work with Commitments	2-59
Working with Commitments	2-59
Defining the Commitment Rules.....	2-59
Defining Commitments at a Work Center Location	2-63
Managing Commitments for Grade and Potency Controlled Items	2-68
Creating Commitments for Potent Units	2-69
Reposting Work Order Commitments	2-72
Understand Grade and Potency Overview.....	2-75
About Grade and Potency	2-75
Grade and Potency Control.....	2-76
Lot Control Items.....	2-76
Understand Lot Processing Overview	2-79
About Lot Processing.....	2-79
Enter Lot Information	2-83
Entering Lot Information.....	2-83
Entering Lot Information for Items.....	2-83
Entering Information for Lots.....	2-87
Work with Lot Availability	2-93
Working with Lot Availability	2-93
Viewing Lot Availability	2-93
Working with Lot Quantities.....	2-96
Working with Lot Activity Dates	2-99
Working with Lot Statuses.....	2-104
View Lot Transactions	2-107
Viewing Lot Transactions.....	2-107
Printing Trace and Track Reports	2-108
Reviewing Trace and Track Information	2-108
Setting up Trace and Track Inclusion Rules	2-111
Reclassify Lots	2-115
Reclassifying Lots.....	2-115
Review Availability and Shortages.....	2-121
Reviewing Availability and Shortages	2-121

Defining Availability Calculations for a Branch.....	2-121
Reviewing Availability	2-123
Managing Shortage Information.....	2-126
Printing Shortages	2-130
Understand Issue Transactions Overview	2-133
About Issue Transactions.....	2-133
When Do You Issue Inventory?	2-133
How Do You Issue Inventory?.....	2-134
From Where is Inventory Issued?.....	2-135
What Tables Store Data when Issuing Inventory?	2-136
Where in the Process Do You Issue Inventory?.....	2-137
Issue Materials	2-139
Issuing Materials.....	2-139
Issuing Materials by Preflushing	2-140
Issuing Materials Manually	2-140
Recording Component Scrap	2-144
Schedule Work Orders	2-147
Scheduling Work Orders	2-147
Where in the Process Do You Schedule Work?	2-148
Reviewing Work Order Information.....	2-149
Revising Work Order Information	2-151
Printing Scheduling Information for Work Centers	2-152
Work with Hours and Quantities.....	2-153
Working with Hours and Quantities	2-153
Where in the Process Do You Enter Hours and Quantities?.....	2-155
Entering Hours and Quantities Manually	2-155
Entering Hours and Quantities through Payroll Time Entry	2-159
Updating Hours and Quantities	2-162
Reviewing Hours and Quantities Transactions.....	2-163
Complete Work Orders	2-167
Completing Work Orders	2-167
Completing a Work Order without Backflushing.....	2-169
Completing a Work Order through Backflush	2-171
Completing Partial Quantities on Work Orders.....	2-176
Processing Work Orders through Super Backflush	2-179
Processing Work Orders Using Quantity at Operation.....	2-185
Completing a Work Order with Serialized Components.....	2-188
Lot Status Processing at Work Order Completion	2-193

Revise the Status of a Work Order 2-195

- Revising the Status of a Work Order 2-195
- Changing the Status of a Work Order to “Closed” 2-196
- Purging a Work Order 2-197

Process Kanbans 2-199

- Processing Kanbans..... 2-199
- Processing Kanban Consumption by Item..... 2-200
- Processing Kanban Supply by Item 2-202
- Processing Kanban Status Override..... 2-206

Review Information..... 2-207

- Reviewing Information..... 2-207
- Reviewing Material Information 2-207
- Reviewing Item Ledger Information 2-214
- Reviewing Work Order Status..... 2-218
- Reviewing Parts List Comparison..... 2-219

Print Material and Operation Reports..... 2-223

- Printing Discrete Manufacturing Reports 2-223

3 Repetitive Manufacturing

Overview to Repetitive Manufacturing 3-1

- About Repetitive Manufacturing 3-1

Enter Rates 3-3

- Entering Rates 3-3

Schedule Rates..... 3-9

- Scheduling Rates 3-9
- Scheduling Items on a Production Line 3-9
- Sequencing Rates by Classification Scheme or Manually 3-11
- Reviewing Production Across Lines..... 3-13

Complete Rates 3-15

- Completing Rates 3-15

Review Information..... 3-21

- Reviewing Information..... 3-21
- Reviewing Production Status 3-21
- Reviewing Production History 3-22
- Reviewing Line Dispatch List..... 3-23

Process Kanbans.....	3-27
Processing Kanbans.....	3-27
Processing Kanban Consumption by Item.....	3-28
Processing Kanban Supply by Item.....	3-30
Processing Kanban Status Override.....	3-34
Close Rates	3-35
Closing Rates.....	3-35
4 System Setup	
Overview to System Setup.....	4-1
About System Setup.....	4-1
Set Up Work Order Codes.....	4-3
Setting Up Work Order Codes.....	4-3
Set Up Manufacturing Information	4-11
Setting Up Manufacturing Information.....	4-11
Setting Up Standard Procedures.....	4-11
Setting Up Employee Labor Rates.....	4-13
Setting Up the Shop Floor Calendar.....	4-14
Setting Up Manufacturing Constants	4-17
Setting Up Work Centers	4-24
Setting Up Resource Units.....	4-29
Setting Up Line and Item Relationships.....	4-32
5 Processing Options	
Discrete Manufacturing Processing Options.....	5-1
Manufacturing Work Order Entry (P48013)	5-1
Generate and Print Work Orders (P31410).....	5-6
General User-Defined Codes (P0005A).....	5-11
Work Order Repost (P3190).....	5-11
Lot Master Revisions (P4108)	5-12
Lot Availability (P41280)	5-13
Lot Tracing and Tracking (P41203).....	5-14
Item Reclassifications (P4116)	5-14
Part/Ingredient Availability (P30205)	5-16
Parts List Inquiry (P3121)	5-16
Item Shortage Workbench (P3128)	5-17
Shortage Revisions (P3118).....	5-17
Work Order Component Shortage List (P31418).....	5-17

Work Order Inventory Issues (P31113)	5-18
Component Scrap Transactions (P31116).....	5-20
Manufacturing Scheduling Workbench (P31225)	5-20
Work Order Time Entry (P311221)	5-22
Manufacturing/Payroll Time Entry (P061181).....	5-23
Production Status (P31226)	5-25
Work Order Completion - Full (P31114)	5-25
Release Backorders (P42117).....	5-28
Super Backflush (P31123)	5-31
Work Order Purge (P4801P)	5-32
Kanban Consumption/Supply (P3157).....	5-32
Kanban Status Override (P3163)	5-35
Co-/By-Products Produced by Process (P30201).....	5-36
Item Availability (P41202).....	5-36
Supply & Demand (P4021).....	5-38
Item Ledger - Costs (P4111)	5-41
Parts List Comparison (P31117)	5-42

Repetitive Manufacturing Processing Options..... 5-43

Enter/Change Rate Schedule (P3109).....	5-43
Line Scheduling Workbench (P3153).....	5-47
Line Sequencing Workbench (P3156)	5-48
Schedule Review (P3152).....	5-49
Rate Transactions Workbench (P3119)	5-49
Super Backflush (P31123)	5-50
Work Order Time Entry (P311221)	5-51
Production Status (P31226)	5-52
Production History (P31227).....	5-53
Line Dispatch List (P3159).....	5-53
Kanban Consumption/Supply (P3157).....	5-53
Kanban Status Override (P3163)	5-56
Batch Rate Close by Date (P3191).....	5-57

System Setup Processing Options..... 5-59

General User-Defined Codes (P0005A)	5-59
Generic Rate/Message Records Program (P00191)	5-59
Work Center Resource Units Refresh (P3007G)	5-59
Kanban Size Calculation (P30450).....	5-60

6 Appendices

Appendix A – Flash Messages in Shop Floor Control 6-1

About Flash Messages in Shop Floor control	6-1
W.O. Scheduling.....	6-1

Operation Scheduling.....	6-2
Urgent.....	6-2
Appendix B – Lead Times	6-3
Overview.....	6-3
Introduction to Lead Times	6-3
Work Order Start Dates	6-5
Operation Start and Due Dates.....	6-6
Overlapping Operations	6-7
Overlapping and Concurrent Operations	6-8
Calculating Lead Times	6-9
Appendix C – Functional Servers.....	6-15
About Functional Servers	6-15

1 Overview

Overview to Shop Floor Control – Discrete

The JD Edwards World Shop Floor Control system implements the material plan by managing the flow of materials inside the plant. An effectively managed Shop Floor Control system serves as a mediator between production control and the shop floor. It allows you to manage and track manufacturing work orders and rate schedules. It utilizes data from the shop floor to maintain and communicate status information regarding materials, work centers, routings, and end operations required to complete the production requests.

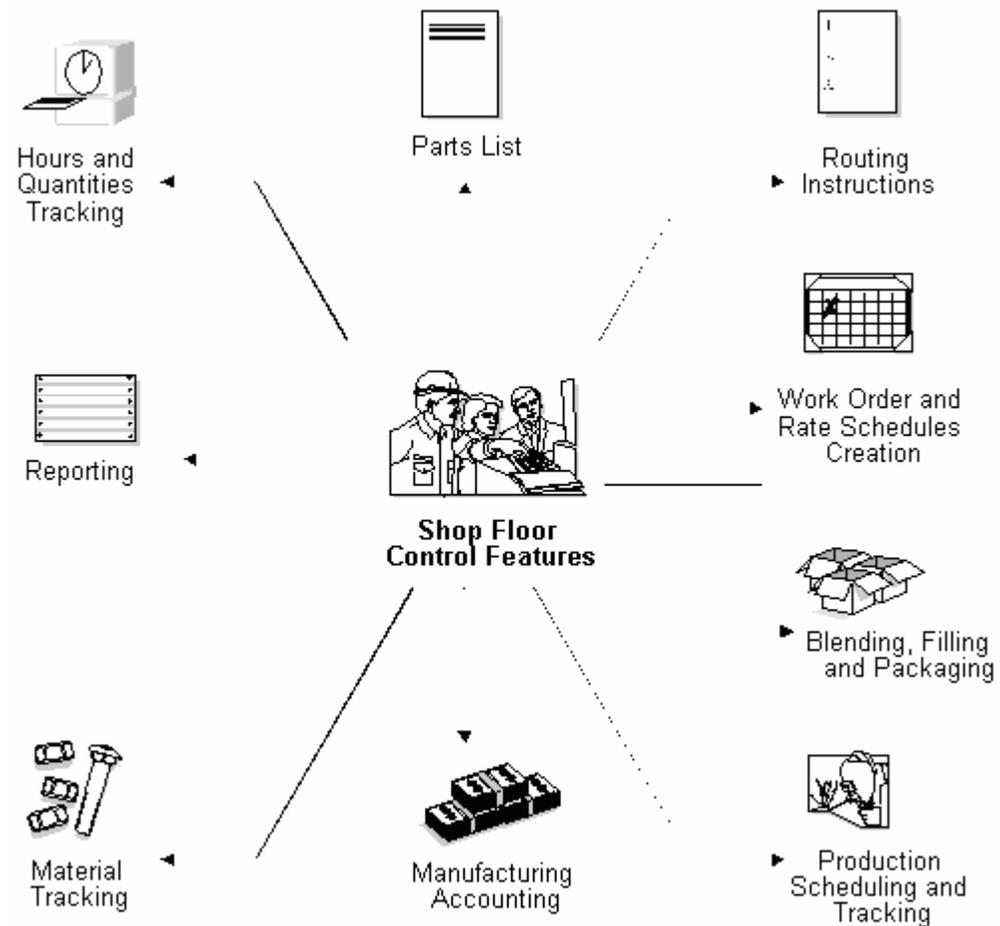
This section contains the following:

- [Features](#)
- [Process Flow](#)
- [Tables for Shop Floor Control](#)
- [Types of Manufacturing](#)
- [Enterprise Requirements Planning and Execution System](#)
- [Sales Order Management System](#)
- [Procurement System](#)
- [Menu Overview](#)

- The *Warehouse Management* system allows you to originate picking requests through Manufacturing systems, which further enhances the automated method of tracking inventory movement within a warehouse.

Features

The following graphic illustrates the features available to you in the Shop Floor Control system. These features are described in detail following this graphic.



Hours and Quantities Tracking

- Enter and track time and quantities completed and scrapped by work order and by employee
- Allocate and track resource usage by work center per calendar month
- Review and analyze reports of work orders with detail by operation of standard versus actual for:
 - Setup, labor, and machine time
 - Quantity complete and scrapped

- Charge actual hours and quantities to a work order as each manufacturing step is completed

Routing Instructions

- Generate a routing automatically when a work order is processed
- Use master routings or non-standard routings for items and indicate when to use each item
- Change the work centers and procedures for each operation on the routing
- Modify the sequence and status of each operation on the routing
- Make real-time modifications to routing instructions
- Display quantity ordered, completed, and scrapped for each operation

Work Order and Rate Creation

- Enter work orders and rates manually
- Create work orders and rates automatically from Material Requirements Planning (MRP) by answering action messages, or from sales order entry and select kits for assemble-to-order environments
- Generate shop floor paperwork automatically, including standard parts lists and routing instructions
- Differentiate work orders and rates by type, priority, and status
- Group work orders by a parent number (a useful feature for job numbers that contain many work order numbers)
- Automatically generate purchase orders for sub-contracted operations on the routing for work orders and rates

Blending, Filling, and Packaging

- Produce and track work orders for the filling and packaging of lube oil finished goods when only one product is produced with no co- or by-product requirements

Production Scheduling and Tracking

- Schedule work center production for rate schedules, work orders, or both
- Track and compare planned production schedules against actual schedules
- Use the online scheduling workbench to review, dispatch, and update production scheduling information in real-time
- Calculate start and complete dates for each work order by operation from the Shop Floor Control Routing Instructions table (F3112)
- Maintain the rate schedule after using rate based MRP

Manufacturing Accounting

- Plan and track standard costs for setup, labor, material, and overhead
- Compare planned costs against actual costs and calculate a variance amount
- Create journal entries to charge actual and variance costs to a work order or rate schedule in the general ledger
- Track weighted average costs, for setup, labor, material and overhead

Material Tracking

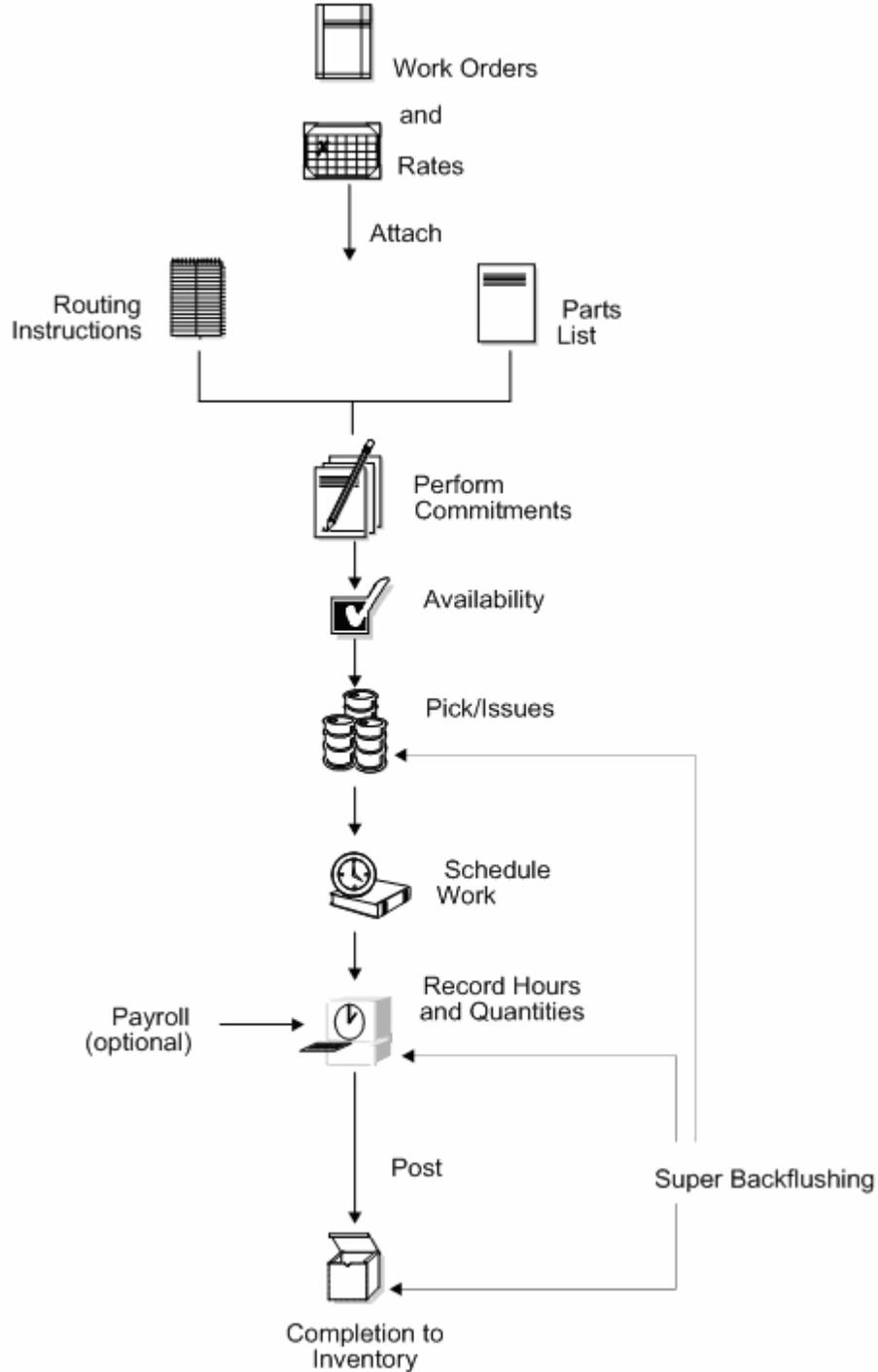
- Create a parts list automatically when you process a work order
- Display the quantity on order, on hand, and available for each part
- Access detailed information about supply and demand quantities
- Check the availability of the components required to manufacture a parent item and generate a shortage list
- Issue the parts to a work order using a manual, preflush, or backflush method
- Backflush both quantities of components issued to a work order and the labor expended with pay point operations
- Enter and track completions to inventory when parent items are completed
- Attach the parts list and routing instructions to the work order and print shop floor paperwork
- Track where lots are used, and split and trace where lots come from with advanced lot control
- Maintain and monitor work orders created from the Configuration Management system for configured items
- Generate an inventory shortage list by work order and item
- Enter issue transactions for inventory items associated with a work order
- Generate a picking request in the Warehouse Management system to select a location and move the inventory (this occurs after the Manufacturing system creates a parts list without a work center attached, and checks availability)

Reporting

- Run reports that compare actual values with planned values and indicate the variance between the two
- Run shortage reports by item or work order to identify potential manufacturing constraints due to a lack of availability of required components
- Print shop floor paperwork, such as work orders, parts lists, and routings for items
- Review daily shop work lists to monitor job status, identify queue problems at work centers, and flag other areas, such as engineering changes or lost material

Process Flow

The following graphic illustrates all of the processes involved in the Shop Floor Control system. The arrows show the flow from process to process, beginning with a work order and ending with an inventory completion.



Tables for Shop Floor Control

The following is a list of the tables used throughout the Shop Floor Control system:

Table	Description
Business Unit Master (F0006)	Identifies branch, plant, warehouse, and business unit (entity) information, such as company, description (name), and category codes assigned to that entity.
Generic Message/Rate (F00191)	Contains codes that correspond to a text message. In the Shop Floor Control system, this is used for routing text on a work order.
Account Master (F0901)	Maintains the account data for the general ledger.
Account Ledger (F0911)	Stores the transaction records for the general ledger.
Work Center Master (F30006)	Contains detail data about all defined work centers.
Bill of Materials Master (F3002)	Defines and maintains warehouse (plant level) information about bills of materials, such as quantities of components, as well as features, options, and levels of detail for each bill.
Item Cost Component Add-Ons (F30026)	Contains frozen standard costs for journal entry creation for work orders.
Routing Master (F3003)	Stores routing information, including operation sequences, and work centers, as well as run, setup, and machine time.
Job Shop Manufacturing Constants (F3009)	Contains general branch/plant information.
Kanban Master (F3016)	Contains the set of kanban cards associated with an item. Each kanban defines the supplying location, consuming location, quantity, and unit of measure. The system uses next numbers to control the kanban identification number. If the system pulls the item from an external source, the supplier's number is included.
Work Order Variance (F3102)	Stores the work order variance that shows the difference in costs from when the standards were set at the beginning of the accounting period.
Work Order Serial Numbers (F3105)	Contains the fields that identify work order assemblies with lot serial numbers.
Item/Line Relationship Master (F3109)	Stores the relationships between items and production lines. The system uses one of the records as the default rate generation rule.
Schedule Quantity Detail (F31091)	Contains the daily quantities making up a work order or a rate. The system uses this file for scheduling and sequencing production lines and work centers.
Shop Floor Control Parts List (F3111)	Contains the components used on a work order.

Table	Description
Shop Floor Control Routing Instructions (F3112)	Contains the instructions specific for manufacturing work orders.
Work Order Time Transactions (F31122)	Stores the labor transactions reported on a work order.
Shortage Maintenance Master (F3118)	Contains component shortages for work orders.
MPS/MRP/DRP Message (F3411)	Contains the supply and demand relationship among the branches.
Forecast (F3460)	Contains the forecast data that Resource Requirements Planning (RRP) validates. It is then used as input to MPS/MRP/DRP.
Inventory Constants (F41001)	Used to control day-to-day transactions that occur within the Inventory Management system. Directs the nature of certain integrated operations between Inventory Management and other systems, such as Sales Order Management, Procurement, and General Accounting.
Item Master (F4101)	Stores basic information about each item defined for inventory, such as description, search name, and units of measure.
Item Branch (F4102)	Defines and maintains warehouse or plant level information, such as costs, quantities, category codes, and physical locations.
Item Location (F41021)	Specifies all inventory locations for an item.
Item Cross Reference (F4104)	Enables you to relate item numbers for a specific purpose.
Lot Master (F4108)	Defines the actual potency of a lot.
Item Ledger (F4111)	Stores transaction history for all items.
Item History (F4115)	Stores usage data for items optional in some Shop Floor Control system transaction programs.
Warehouse Requests (F4600)	Stores putaway, picking, and replenishment movement requests.
Warehouse Suggestions (F4611)	Contains the warehouse requests after they have been processed by putaway, picking, or replenishment.
Work Order Master (F4801)	Stores the work order information, such as item numbers, quantities, and dates.
Work Order Instruction/Disposition (F4802)	Contains text and instructions for specific work orders that are identified by different record types.

Types of Manufacturing

Depending on the type of product being produced, almost all manufacturing can be defined in one of two ways:

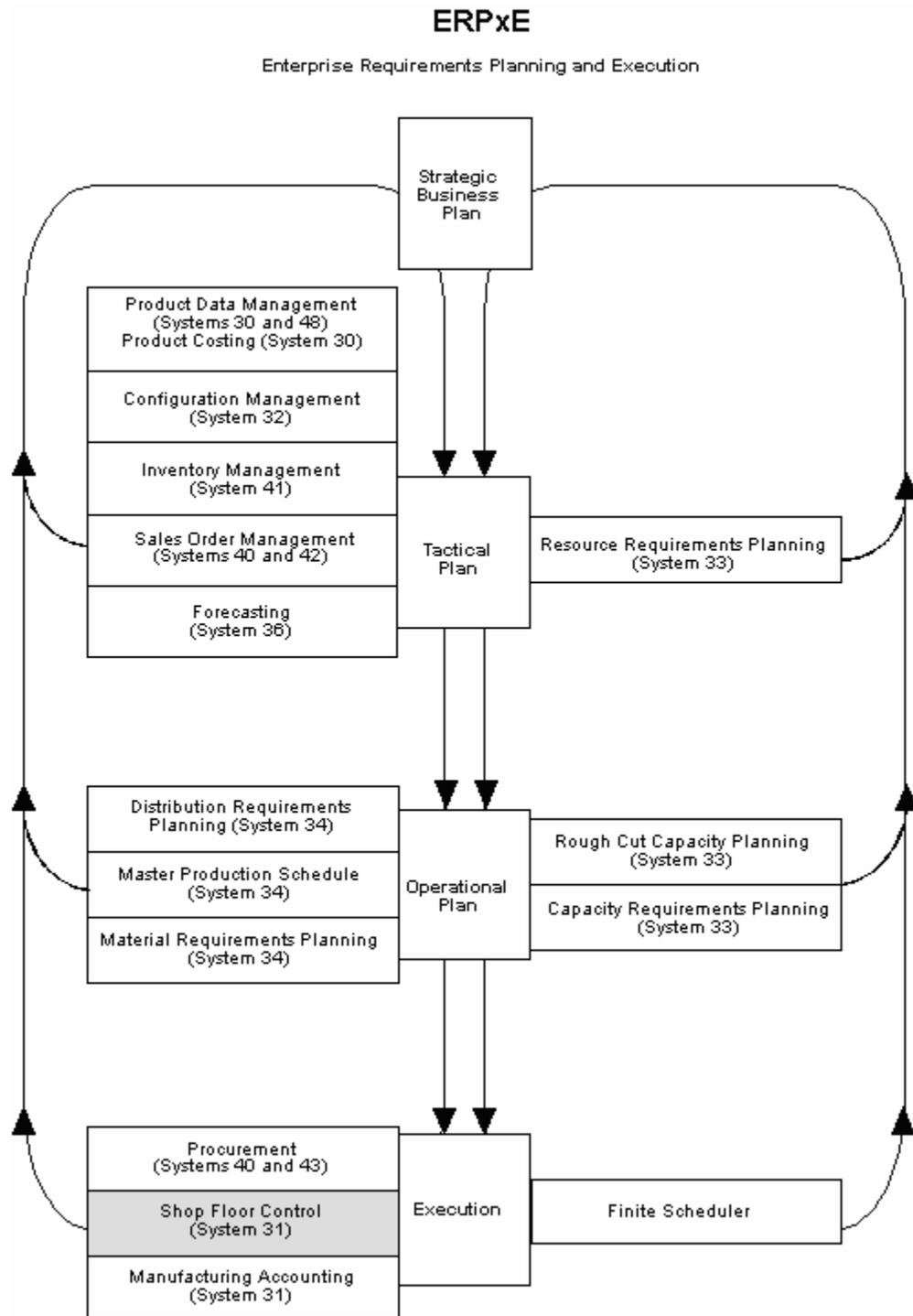
- Discrete
- Process

Both discrete and process manufacturing use bills of material and routings. The bills of material contain individual parts or components, such as a nut, bolt, wire, plastic, or metal part of a fixed or variable quantity. Products can be broken down into subassemblies that go into various larger assemblies.

Enterprise Requirements Planning and Execution System

Shop Floor Control is one of the many systems that make up the Enterprise Requirements Planning and Execution (ERP_x) system. The ERP_x system enables you to coordinate your inventory, raw material, and labor resources to deliver products according to a managed schedule. ERP_x is fully integrated and ensures that information is kept current and accurate across all your business operations. It is a closed-loop manufacturing system that formalizes the activities of company and operations planning, as well as the execution of those plans.

The following systems make up the JD Edwards World ERPx product group.



Sales Order Management System

Order entry is a process of accepting and translating what the customer wants into terms used by the manufacturer or distributor. Sales order entry is the main input to tracking the accuracy of the master production schedule.

There are three levels of sales order entry:

- *Basic* – Create shipping documents for make-to-stock finished goods
- *Advanced* – Create assembly orders for assemble-to-order products stocked at lower levels
- *Complex* – Create design project orders to develop, prototype, and test engineer-to-order products

Sales order entry has operational guidelines in which it must:

- Produce output corresponding to items in inventory or parents in the bill of material
- Be used on an as-occurring basis in order to properly reflect available-to-promise

Features of Sales Order Management

The main features of Sales Order Management can be divided into three categories: Simplicity, flexibility, and adaptability.

Simplicity

- Automatic order numbering
- Automatic, multiple choices of costing
- Automatic, flexible pricing, including specials and contracts
- Automatic online credit check with order hold online
- Online order summary and total with tax calculation
- Efficient customer billing

Flexibility

- User defined order types, transaction types, and transaction flow
- User controlled format and functions of order entry form
- Messages for specifications and instructions
- Multiple customer, bill-to, and ship-to addresses
- Back order control and online back order release
- Hold order processing and online release
- Individual or batch order printing
- Online or batch printing

- Serial number tracking

Adaptability

- Item substitutions and replacements
- Multiple shipments and invoices per order
- Credit processing for returned goods
- Comprehensive sales and tax data collection
- Direct ship
- Transfer orders to create purchase and sales orders
- Direct interfaces to Address Book, Accounts Receivable, Inventory Management, and General Ledger systems

Procurement System

Purchasing is the execution of the internal schedule through the acquisition of material or services from an external source. You use the Procurement system to obtain the best quality parts at the most reasonable rates at the correct time. After you enter a purchase order and its detail information, you can record the receipt of an order line.

Features of Procurement

The main features of purchasing can be divided into three categories: Simplicity, flexibility, and adaptability.

Simplicity

- Automatic order numbering.
- Shared tables with the Inventory Management system for automatic costing of purchase orders. Tracks number of orders placed, leadtime, and unit costs. Quantities on order are reflected in inventory inquiries.
- Online order summary and total.
- Standard form formats for entry programs provide ease of learning.

Flexibility

- Combined inventory and non-inventory purchasing. This allows purchase order lines to send receipt costs to inventory or to a general ledger account or a project.
- Budget checking for general ledger account purchases. You can use one of three budget checking methods against user-selected budget ledger type.
- Requisition management. This permits an order to flow through an online requisition process prior to the actual approval of the order for purchase.

- User defined order types, transaction types, and transaction flows. This gives wide-ranging flexibility for setup and customization without programming changes.
- Unit or extended receipt costing. The system can calculate the correct extended amount or unit cost, depending upon your usage.
- Ease of data changes for order line delivery. You can also make data changes for multiple orders at the same time.

Adaptability

- Multiple receipts, or receipt with a cancel remaining, or open order line cancel allowed, as required
- Fully integrated with other JD Edwards World systems, including Inventory Management, Accounts Payable, General Accounting, and Address Book systems
- A matching function in Accounts Payable and Procurement receipts provides for changes to purchase order cost based upon customer invoice
- Buyers' reports and forms display purchase order quantities based on item-specific reorder point and economic order quantity
- Purchase Order Generator to simplify purchase order creation, including online view of economic order quantity, re-order point, and days stock available
- Change order controls, which furnish detail records of changes
- Model purchase orders and blanket orders providing easy duplication and release of prior orders without additional order entry keying

Menu Overview

Menu Overview - Shop Floor Control Discrete Manufacturing

Manufacturing System G3
Shop Floor Control G31



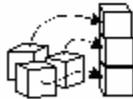
Daily Operations

- * Daily Order Preparation - Discrete G3111
- * Daily Order Reporting - Discrete G3112
- * Daily Processing - Repetitive G3115



Periodic Operations

- * Periodic Functions - Discrete G3121



Setup Operations

- * Shop Floor Control Setup G3141



Advanced and Technical Operations

- * Advanced Shop Floor Control G3131

Fast Path Commands

The following table illustrates the fast path commands you can use to move among the Shop Floor Control menus. From any menu, enter the fast path command at the command line.

Fast Path	Menu	Title
ASF	G3131	Advanced Shop Floor Control
PSFD	G3121	Periodic Functions - Discrete
DOPD	G3111	Daily Order Preparation - Discrete
DORD	G3112	Daily Order Reporting - Discrete
DRB	G3115	Rate Based Scheduling
SFCS	G3141	Shop Floor Control Setup

2 Discrete Manufacturing

Overview to Discrete Manufacturing

Objectives

- To learn how to attach a parts list and routing instructions to a work order
- To understand how, when, and where to make commitments
- To understand how availability is calculated and how to track shortages
- To identify the four methods of issuing materials
- To enter hours and quantities and post them to the manufacturing system
- To learn how to record completions and release backorders

About Discrete Manufacturing

Discrete manufacturing produces products, such as tables or bicycles, using resources or parts. Discrete manufacturing is usually characterized by the strategy used, such as:

- Make-to-stock, using either a highly repetitive or process order based system
- Any of the “to-orders,” such as make-to-order, assemble-to-order, or engineer-to-order
- The one-off or job shop environment

Cars, furniture, electronics, and airplanes are examples of products of discrete manufacturing.

Discrete manufacturing consists of the following:

- Understanding work orders
- Creating work orders
- Processing work orders
- Understanding commitments
- Working with commitments
- Understanding grade and potency
- Understanding lot processing
- Entering lot information
- Working with lot availability
- Viewing lot transactions

- Reclassifying lots (optional)
- Reviewing availability and shortages (optional)
- Understanding issue transactions
- Issuing materials
- Scheduling work orders
- Working with hours and quantities
- Completing work orders
- Revising the status of work orders
- Process kanbans
- Reviewing information (optional)
- Printing Discrete Manufacturing reports (optional)

Blending, Filling, and Packaging

JD Edwards World has enhanced the Manufacturing systems to manage the manufacturing of bulk blended and filled products. These enhancements include accounting for gains and losses, recording ambient and standard quantity variations, and the reconciliation of bulk products in tanks.

See Also

- *Bulk Stock Management Guide*

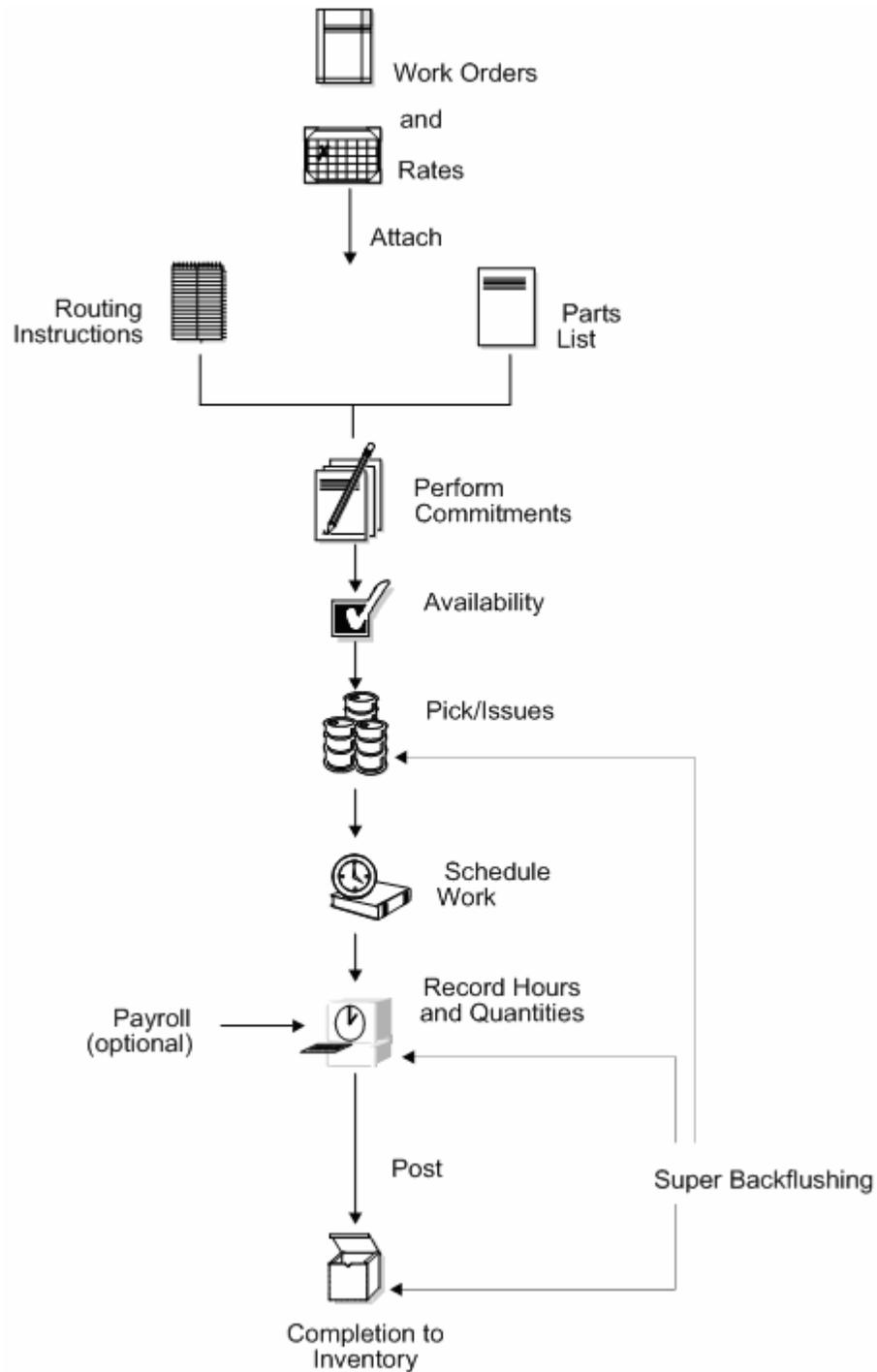
How Are Units of Measure Used?

Not all items are planned, scheduled, or produced in their primary unit of measure. To accommodate this, full unit of measure capabilities are allowed throughout the Shop Floor Control system.

Most entry programs have a unit of measure next to the quantity fields, and the unit of measure is stored in the database tables, along with the quantities. The system uses three fields in the Item Master table, Component Unit of Measure, Production Unit of Measure, and Primary Unit of Measure, throughout shop floor as defaults in entry forms. The Primary Unit of Measure *must* be the smallest of the three units of measure.

Transactions in Shop Floor Control

The following graphic illustrates the transactions throughout the Shop Floor Control system. You will see this graphic throughout this guide, with different areas highlighted to indicate where you are in the process.



Understand Work Orders Overview

About Work Orders

Work orders consist of a work order header, a parts list, and routing instructions. The work order header specifies the quantity of the item requested and the date it is required. The parts list and routing instructions specify the components, operations, and resources required to complete the work order.

You create a work order header using one of three methods:

- MRP
- Manually
- Work Order from Sales Order

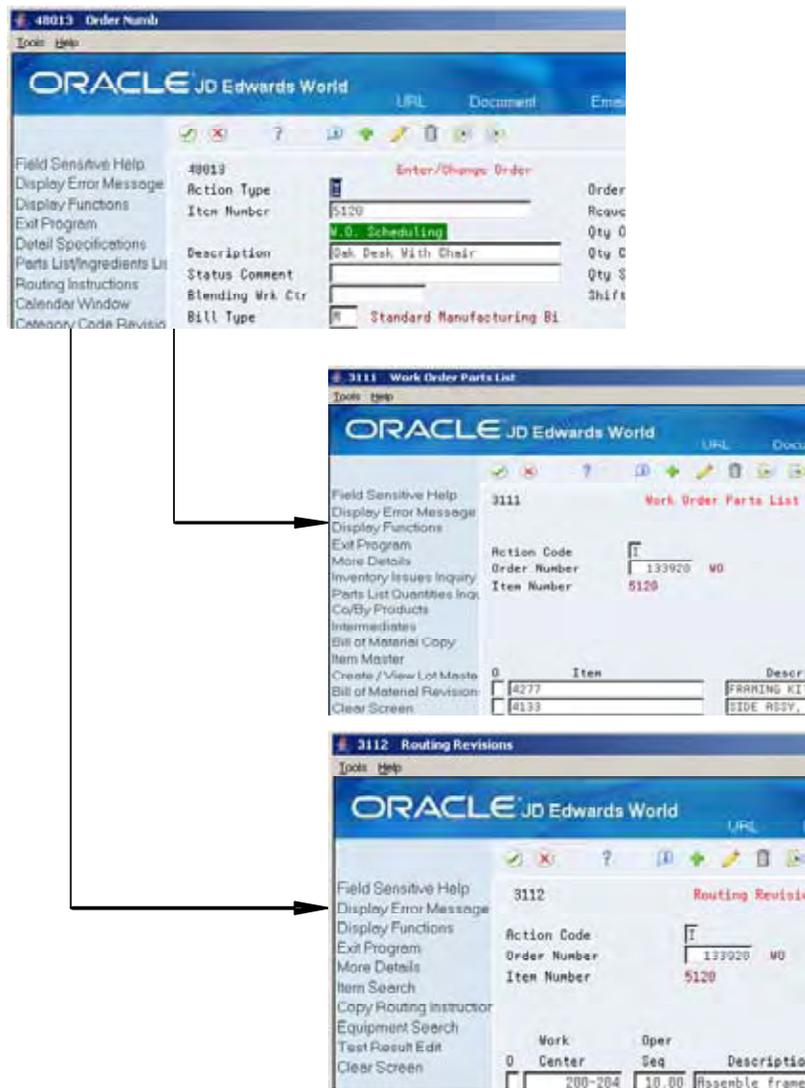
You then attach the parts list and routing instructions either manually or using a batch program. This batch program also allows you to process multiple work orders, which includes:

- Updating the status of each work order
- Supplying the date to use for effectivity checking
- Issuing inventory
- Printing shop paperwork
- Calculating standard costs for configured items
- Allowing substitute items to be used

Usually, you enter all of the work order headers and then attach the parts lists and routing instructions together, to create the work order, using the batch program (Order Processing). However, if you need to change a part on the work order parts list or specify substitutes, you must manually attach the parts list and routing instructions, or manually change them after you run the batch program.

When you manually attach routing instructions to your work order, you can identify the percent of run time a sequence can overlap the previous operation.

The following graphic illustrates the work order structure.



Regardless of the method you use to attach the parts list and routing instructions, you can define the unit of measure to be used for backscheduling the work order. To do so, you use the processing options for both the Enter/Change Order and the Order Processing programs.

After you determine the resources required to produce the items requested, you can schedule the work order and begin the work. As you complete items on the work order, you report:

- Items completed
- Materials used
- Quantities scrapped
- Hours of machine and personnel time expended

You can report completions by operation so you can track work order activity as it is in process. Using the feature cost percent for configured items and the resource

percent for process items, you can also calculate costs by operation and track inventory throughout the production process.

This section contains the following:

- [What Happens When You Attach a Parts List?](#)
- [When Do You Attach Routing Instructions?](#)
- [How Does the System Calculate the Start Date?](#)
- [What Is Shop Paperwork?](#)
- [What Is Backscheduling?](#)
- [Blending, Filling, and Packaging](#)

What Happens When You Attach a Parts List?

You attach the parts list after you enter a work order header. A parts list is a list of the components and their quantities required to complete the work order. You can attach the parts list:

- Manually
- By setting a processing option in order entry to automatically attach it after the routing is attached
- Automatically, using Order Processing

You attach a parts list using the batch program the same way as attaching a parts list manually (non-batch). For batch bills and routings, the system determines which parts list to use by matching the work order quantity for the bill type specified on the work order header. If the system does not find a batch size that matches, it looks in the following order until a match is found:

- Specified bill type with a zero batch quantity
- Type M bill with the specified quantity
- Type M bill with a zero batch quantity

If no match is found, no parts list is attached, and you must attach the parts list manually.

Components are included in or excluded from the parts list for a work order based on their effectivity dates. The quantity of each component is increased by its scrap factor and operation scrap, if applicable.

The following table illustrates several scenarios pertaining to shrink, scrap, and operational yield.

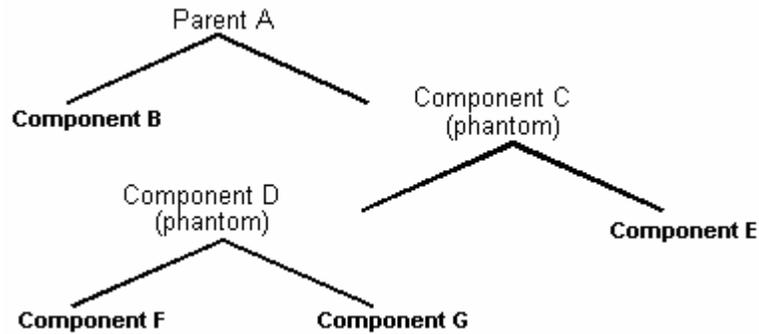
333					
212					
(2)					
OP 10					
424					
(4)					
OP 10					
123					
(1)					
OP 10					
122					
(12)					
OP 10					
121					
(2)					
OP 25					
444					
(1)					
OP 30					
Component					
Quantity Per					
Operation					
Order with no shrink, scrap or yield - quantity = 10:					
	212	424	123	122	121
	Component				444
	20	40	10	120	20
	Quantity Per				10
Order with 10% shrink on parent 333 - quantity = 10					
	212	424	123	122	121
	Component				444
	22	44	11	132	22
	Quantity Per				11
Order with 10% scrap on component item 444 - quantity 10					
	212	424	123	122	121
	Component				444
	20	40	10	120	20
	Quantity Per				11
Order with 95% yield at operation 10 and 95% yield at operation 25 - quantity 10					
	212	424	123	122	121
	Component				444
	22	44	11	133	21
	Quantity Per				10
Order with 10% shrink on parent 333, 10% scrap on component 444, 95% yield on operations 10 and 25 - quantity = 10					
	212	424	123	122	121
	Component				444
	24	49	12	146	23
	Quantity Per				12

Phantom Items

The Material Requirements Planning (MRP) system does not plan to produce phantom items, but will take their existence into account. The Shop Floor Control system includes lower-level components of phantom items when you attach a parts list. Phantom items:

- Are not planned by MRP
- Can be any lower-level component in the bill for a parent item
- Can be used to define a subassembly within a parent item when the subassembly is not stocked in inventory nor planned by MRP, but is consumed into the parent

In the following example, the parts list would include items B, E, F, and G.



The system calculates component quantities according to the order quantity on the work order if they are variable quantity items. If you activate the rounding feature in the Item Master table (F4101), the system rounds up the extended quantity value to a whole number if it has a decimal value greater than or equal to .01.

The system uses the leadtime offset for each component to determine that component's requested date. If a component does not have a leadtime offset, its requested date will be the start date of the work order, or the start date of the associated operation sequence on the routing. A component can have a negative leadtime offset, indicating that it is required before the start date of the work order. Examples are items that need processing or inspection before they can be used in an assembly. If the requested date for a component falls beyond the order completion date, the system enters the order completion date for the item.

When Do You Attach Routing Instructions?

You attach the routing instructions after you enter a work order header. A routing instruction is a list of the operations and resources required to complete the quantity of items requested from the shop floor. You can attach the routing instructions:

- Manually
- By setting a processing option in order entry to automatically attach it after the parts list is attached
- Automatically, using Order Processing

Regardless of whether you manually attach the routing instructions or use the batch program, you should attach it at the same time that you attach the parts list. The system uses the routing to verify information about each item on the parts list.

Outside Operations

You might have steps on your routing that are completed by outside operations. In this case, you need to identify those steps and either run order processing or interactively attach the routing to create purchase orders for the steps. When you record the receipt, a window automatically displays for you to update the routing quantities and status as necessary.

on the purchase order. System-generated item numbers for outside operations do not have unit costs defined. Therefore, if you do not define outside operations as items, they will carry a zero unit cost when you perform a cost rollup for the parent item.

The new item's quantity on the purchase order and the supplier instructions are updated with the current information.

The system indicates *NO PO in the Related Order field on the routing instructions if it cannot create a purchase order for the following reasons:

- No Item Master or Item Branch record was found for the parent item on the routing that has an outside operation.
- The processing options in the purchasing order activity rules were not set up for line type, document type, and status.

How Does the System Calculate the Start Date?

The system uses level leadtime or leadtime per unit to calculate the start dates of work orders from the due dates.

Fixed Leadtime

If an item on the work order has a fixed leadtime, the system uses the level leadtime to backschedule to determine the start date.

For example:

- Work order due date = 10/15/18
- Level leadtime = three days
- Start date = 10/12/18

The system calculates the start date for the work order by subtracting the level leadtime or leadtime per unit, depending on the fixed or variable leadtime flag, from the required date. The system displays an error message if one of the following occurs:

- The start date differs from the date of the first operation sequence on the item's routing.
- The operation sequence dates could not be calculated using back scheduling.

Variable Leadtime

If an item on the work order has a variable leadtime, the system uses the leadtime per unit to backschedule to determine the start date. The system uses the following calculation:

$$\frac{(\text{Leadtime per unit} \times \text{order quantity} / \text{TIMB (item branch)}) + \text{setup} + \text{queue}}{\text{Work hours per day}}$$

For example:

- Work order due date = 10/15/18
- Leadtime per unit = 32 hours
- Work order quantity = 1000
- Setup = 1 hour
- Queue = 9 hours

The system calculates the start date by counting back two working days on the shop floor calendar from the due date. The work order start date is 10/13/18.

See Also

- *Appendix B — Leadtimes*

What Is Shop Paperwork?

Shop paperwork consists of the following printouts:

- Work orders with or without the parts list or routing information
- Shop packet summary
- Parts list shortages

Shop paperwork can be generated when you process the work order using the batch program, or by running the batch program in print only mode.

What Is Backscheduling?

To meet the MRP required date for an order, the Shop Floor Control system assigns a completion date for the work order routing that is one day prior to the MRP required date.

Then, the system assigns the start and requested dates to each operation in the routing for the work order. Assigning the start and requested dates for each operation is called backscheduling.

Backscheduling ensures that the material is out of production and available on the required date. For example, a work order routing completion date of February 15 ensures that the items produced will be out of production and available for shipping or sale on the MRP required date of February 16.

3112 Routing Revisions

ORACLE JD Edwards World

Branch/Plant: R30
Requested: 09/08/17

Action Code: [F]
Order Number: 65055 WO
Item Number: 5120
Oak Desk With Chair

Work Center	Oper Seq	Description	Machine	Run Hours	Cons
				Labo	Prod
200-204	10.00	Assemble frame		20.00	Cons
200-204	20.00	Assemble sides/back to frame		16.00	Cons
200-204	30.00	Attach drawer slide kits		15.20	Cons
200-204	40.00	Attach top		7.20	Cons
200-202	50.00	Finish		2.00	Cons
200-204	60.00	Package with chair		12.00	Cons

Opt: 5=Text F4=Full Details F6=Item Search F10=Copy Routings F24=More

3112 Routing Revisions

ORACLE JD Edwards World

Branch/Plant: R30
Requested: 09/08/17

Action Code: [F]
Order Number: 65055 WO
Item Number: 5120
Oak Desk With Chair

Work Center	Oper Seq	Description	Machine	Run Hours	Cons
				Labo	Prod
200-204	10.00	Assemble frame		20.00	Cons
		Start		Setup Hours	2.50
		Requested: 08/27/17	Op Typ	Rel PD	Queue Hours
		09/28/17	Pay Pt	Equip	Move Hours
				Line/Cell	2.50
		Next Oper.	Craft.	Inst No	Time Basis
				1.0	1
		Overlap %	Crew	Supplier	Employee #
		Yield %	Dum %	Resource	UOM
		.00	.00		
		Repl Loc			
200-204	20.00	Assemble sides/back to frame		16.00	Cons
		Start		Setup Hours	
		Requested: 09/01/17	Op Typ	Rel PD	Queue Hours
			Pay Pt	Equip	Move Hours
				Line/Cell	
		Next Oper.	Craft.	Inst No	Time Basis
				1.0	1
		Overlap %	Crew	Supplier	Employee #
		Yield %	Dum %	Resource	UOM
		.00	.00		
		Repl Loc			

Opt: 5=Text F4=Full Details F6=Item Search F10=Copy Routings F24=More

After you have defined your work order routing, the system:

- Retrieves the resource units for the work center of the routing operation. Resource units are factored (that is, increased or decreased) by the resource unit efficiency and utilization percentages.
- Consumes the hours (queue, run, then move hours), using the calculations for either fixed or variable leadtime.
- Scales the work center's remaining units proportionate to the previous operation's remaining units. For example, if 25% of the previous work center's units remain available, the current work center's units available to schedule for

the same day will equal 25% of its daily total. This assumes that all work centers have consumed 50% of available units by the middle of the calendar work day.

Blending, Filling, and Packaging

Use Discrete Manufacturing to produce and track work orders for the filling and packaging of lube oil finished goods when only one product is produced with no co- or by-product requirements.

See Also

- *Bulk Stock Management Guide*

Create Work Orders

Creating Work Orders

A work order is a request to produce a certain quantity of an item by a given date.

This section contains the following:

- [Entering Work Order Headers](#)
- [Attaching the Parts List Interactively](#)
- [Attaching the Routing Instructions Interactively](#)
- [Assigning Serial Numbers](#)

Entering Work Order Headers



From Shop Floor Control (G31), choose **Discrete Daily Order Preparation**
From Daily Order Preparation - Discrete (G3111), choose **Enter/Change Order**

To enter a work order header, you identify the item, its branch/plant and quantity, and the requested date for the work order. You may, optionally, enter other information not required at order entry, such as the revision level for the bill of material or associated sales information.

The system calculates the start date based on the requested date that you enter. If the requested date is before the current date or is not defined as a work day, a warning message appears. The system cannot calculate the start date for the work order if the requested date is in error.

JD Edwards World recommends that you use different document types to identify the different types of work orders, such as rework, repair, or prototypes.

Use Engineering Change Order (ECO) Revision to create a work order against a prior revision level by:

- Selecting a revision level to attach to the work order
- Manually entering a different revision level

Entering work order headers includes the following tasks:

- Entering identifying information
- Entering scheduling information
- Entering descriptive information (optional)
- Entering planning information (optional)

- Entering responsible persons (optional)
- Entering sold to information (optional)
- Entering accounting information (optional)
- Entering a revision level (optional)

Before You Begin

- Use the processing options for order entry to control how the system processes information on the order and to access associated information, such as the order's parts list and routing instructions.
- Set up the shop floor calendar for the work days and months that the order activity will span, including leadtimes. See *Setting Up Shop Floor Calendar*.
- Set up the document types that you use to identify different work order types in the following places:
 - User Defined Codes (00/DT) table
 - Processing options of the Supply/Demand Inclusion Rules program, if the new document types are to be used in other parts of the Manufacturing system
- Enter the unit of measure in the processing options that you want the system to use for backcheduling the routing operations for an item.
- Check the availability of the parts that are needed to complete a work order before you create the work order. See *Reviewing Availability and Shortages*.
- Set up valid work center locations. See *Setting Up Work Centers*.
- Use the processing options to initiate Warehouse Management system integration. See *Advanced Warehouse Management Guide* for information about setting up Warehouse Management.

What You Should Know About

Locating related sales order information You can access Order Address Information if you need the address of the customer on the sales order related to your work order. Blank fields appear when there is no sales order associated with your work order.

Adding description details You can access Work Order Detail Entry to add detail to the work order description (F5). If the work order is printed the detail will appear as text lines.

Manufacturing Accounting system If you use summarized journal entries in Manufacturing Accounting, the system uses Next Numbering to assign document numbers by document type for the batch of work orders being summarized.

See *Reviewing Summarized Work Orders* in the *Product Costing and Manufacturing Accounting Guide*.

Blending, filling, and packaging

Use a processing option for the Enter/Change Order program for the blending and filling processes. You specify the program ID of the Formula Optimization routine the system calls when you select to optimize the formula from the parts list.

When you generate a work order parts list the system checks the allowed products matrix for an incompatibility between the parts list and the blending tank. The incompatibilities appear as errors.

See *Bulk Stock Management Guide*.

Quality Management test results

As you create a work order, you can:

- Use Preference Profiles to maintain tests for the parent item.
- Maintain generic text to indicate when to test materials, and with which test.
- Enter test results for the tests defined for the parent item.

See *Working with Test Results in the Quality Management Guide* for more information.

Import/Export

This program supports Import/Export Functionality. See *Technical Foundation* for more information.

To enter identifying information

On Enter/Change Order

Complete the following fields:

- Item Number
- Branch/Plant

Field	Explanation
Item Number	A number that the system assigns to an item. It can be in short, long, or 3rd item number format.
Branch/Plant	<p>A code that represents a high-level business unit. It can be used to reference a branch or plant that might have departments or jobs, which represent lower-level business units (data item MCU), subordinate to it. For example:</p> <ul style="list-style-type: none">▪ Branch/Plant (MMCU)▪ Dept A (MCU)▪ Dept B (MCU)▪ Job 123 (MCU) <p>Business unit security is based on the higher-level business unit.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control and Manufacturing Accounting: This field identifies the branch/ plant in which the item resides.</p>

To enter scheduling information

An error message appears if a scheduling problem exists on your work order. This message indicates that there is a difference between the work order start date and one or both of the following:

- The start date of the first routing operation
- The calculated start date for the work order, which indicates difficulty in back scheduling

On Enter/Change Order

Complete the following fields:

- Requested
- Quantity Ordered

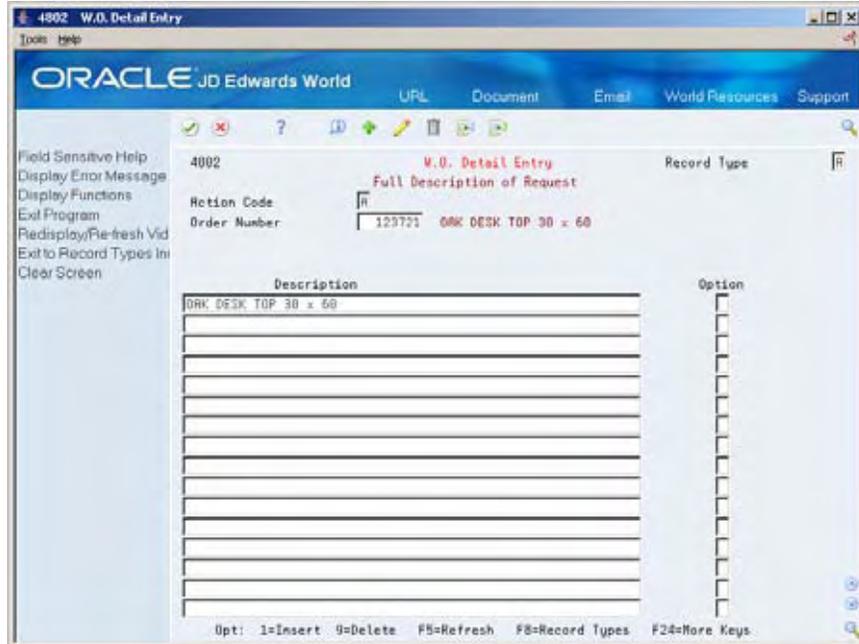
Field	Explanation
Requested	<p>The date that an item is to arrive or that an action is to be complete.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control:</p> <p>When you change the requested date:</p> <ul style="list-style-type: none"> ▪ The system calculates a new start date based on the new requested date if you delete the date in the Start Date field before you enter the new requested date. If you do not delete the start date, the system does not recalculate or change it. ▪ The system recalculates the operation start and complete dates according to the scheduling rules defined.
Qty Ordered	<p>The quantity of units affected by this transaction.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control Discrete Manufacturing:</p> <p>When you change the order quantity, the system recalculates the following:</p> <ul style="list-style-type: none"> ▪ The component-required quantities and commitments ▪ The operation start and complete dates, if the leadtimes are variable <p>Note: Order quantity should not be changed after transactions have occurred against the order.</p> <p>In the process industry:</p> <p>The quantity of co-/by-products produced by the process.</p>

To enter descriptive information

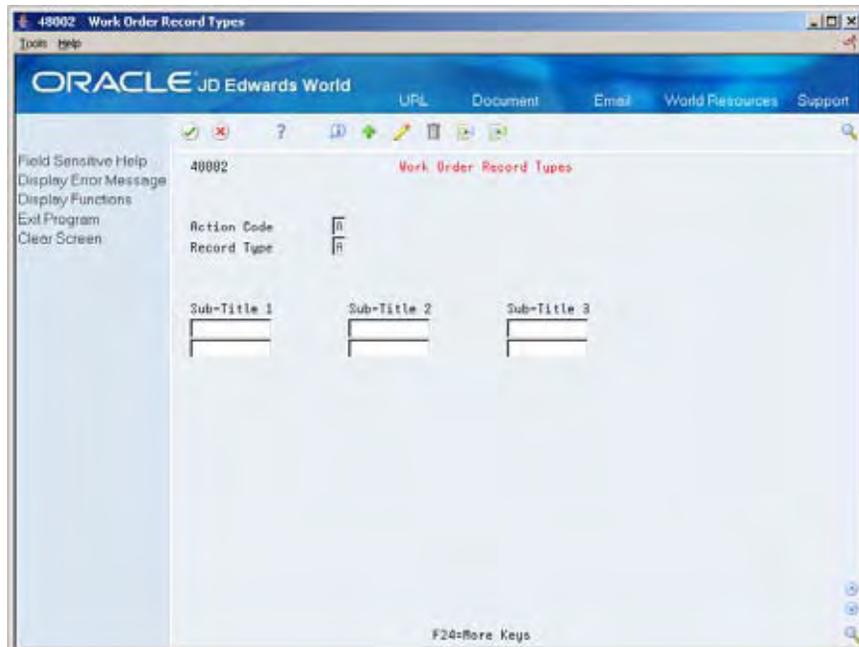
You can enter descriptive information to further identify the work order, such as classification, priority, lot identification, parent item, and the revision level of the related bill of material.

On Enter/Change Order

1. Complete the following optional fields:
 - Type
 - Priority
 - Remarks
 - Lot Number
 - Parent Work Order Number
 - Revision Level
2. Choose Work Order Detail Entry.



3. On Work Order Detail Entry, complete the following field to add detail text regarding the work order:
 - Description
4. Choose Work Order Record Types.



5. On Work Order Record Types, complete the following fields to identify up to three additional headings for the detail form:
 - Subtitle I

- Subtitle II
 - Subtitle III
6. Choose Work Order Category Codes.

7. On Work Order Category Codes, complete the following optional fields:

- Phase (Category Code 1)
- Category Code 2
- Category Code 3
- Category Code 4
- Category Code 5
- Status
- Service Type
- Skill Type
- Experience Level
- Category Code 10
- Originator
- Supervisor
- Standard Description
- Search Cross Reference

Field	Explanation
Type	<p>A user defined code (00/TY) that indicates the type classification of a work order or engineering change order.</p> <p>You can use work order type as a selection criteria for work order approvals.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control:</p> <p>If you leave this field blank on order entry, the system uses the value specified in the processing options.</p>
Priority	<p>A user defined code (system 00, type PR) that indicates the relative priority of a work order or engineering change order in relation to other orders.</p> <p>A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work order you create on those forms and on the Project Setup form. You can either accept or override the default value.</p>
Remarks:	<p>Extended description field for work order information.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control:</p> <p>If you leave this field blank, the system displays the description for the item from the Item Master table. However, you can override this default by changing the field on the work order header.</p>
Lot/SN	<p>A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.</p>
Parent W.O. No	<p>This is the parent work order number. You can use this number to:</p> <ol style="list-style-type: none"> 1. Enter default values for newly added work orders, for example, Type, Priority, Status, or Manager. 2. Group work orders for project setup and reporting <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control:</p> <p>You can manually enter this number to:</p> <ul style="list-style-type: none"> ▪ Identify multi-level configured items ▪ Provide the default for work orders for the lower configured item (if you enter it for the top-level configured item) ▪ Group work orders for project setup and reporting

Field	Explanation
Revision Level	Indicates the revision level of a bill of material. It is usually used in conjunction with an engineering change notice or order (ECN or ECO). The revision level of the bill of material should match the revision level of its associated routing (data item RREV), although the system does not check this. This value is defined and maintained by the user.
Sub-Title Description	A subtitle, description, remark, name, or address. The text you type in this field appears as a column head on the Work Order Detail Entry form for the record type indicated.
Category Code 1	A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time. Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.
Status	A user defined code (system 00, type W6) that indicates the status of the work order.
Service Type	A user defined code (system 00, type W7) that indicates the service type for the work order.
Skill Type	The type or category of work order. <i>Form-specific information</i> For Shop Floor Control: A user defined code (system 00, type W8) that indicates the skill type for the work order.
Experience Level	The type or category of work order. <i>Form-specific information</i> For Shop Floor Control: A user defined code (system 00, type W9) that indicates the experience level for the work order.
Address Number - Originator	The address book number of the person who originated the change request.

Field	Explanation
Supervisor	<p>The address book number of the supervisor.</p> <p>Note: A processing option for some forms allows you to enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers & Supervisor form. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. You can either accept or override the default value.</p>
Message Number	<p>A user defined code (system 48, type SN) that is assigned to a standard note, message, or general narrative explanation. You can use this code to add instructional information to a work order. You set up codes for this field on Standard Description.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Equipment/Plant Maintenance users:</p> <p>You can use this code to assign narrative text for a standard procedure. The information appears on the Item PM schedule and the work order routing.</p>
Reference	<p>An alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.</p>

To enter planning information

You can identify where the work order is in the process and if it has been frozen.

On Enter/Change Order

Complete the following optional fields:

- Status Comment
- Status
- Freeze Code

Field	Explanation
Status Comment	A brief description to explain the status of the work order.
Status	<p>A user defined code (00/SS) that describes the status of a work order or engineering change order. Any status change from 90 thru 99 automatically updates the date completed.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control:</p> <p>A processing option for order entry lets you enter a default value for this field.</p>

Field	Explanation
Freeze Code	A code that indicates if the order is frozen. MPS/MRP will not plan for frozen orders. Valid codes are: Y Yes, freeze the order N No, do not freeze the order (Default)

To enter responsible persons

You can identify the persons associated with the work order.

On Enter/Change Order

Complete the following optional fields:

- Planner
- Supervisor
- Customer

Field	Explanation
Planner	The address book number of a manager or planner. Note: A processing option for some forms lets you enter a default value for this field based on values for Category Codes 1 (Phase), 2, and 3. Set up the default values on the Default Managers and Supervisors form. After you set up the default values and the processing option, the information displays automatically on any work orders you create if the category code criterion is met. (You can either accept or override the default value.) <i>Form-specific information</i> For Shop Floor Control: If you leave this field blank, the system uses the planner for the item in the Branch/Plant table.
Customer	The address number you want to retrieve. You can use the short format, the long format, or the tax ID (preceded by the indicators listed in the Address Book constants).

To enter sold to information

You can identify associated sales information for the work order.

On Enter/Change Order

Complete the following optional fields:

- Reference

- Customer
- Associated Sales Order

The fields listed above will contain default information if there is a sales order associated with this work order.

Field	Explanation
Associated SO	A number that identifies a secondary purchase order, sales order, or work order associated with the original order. This is for information only.

To enter accounting information

You can identify the business unit to be charged and its account.

On Enter/Change Order

Complete the following optional fields:

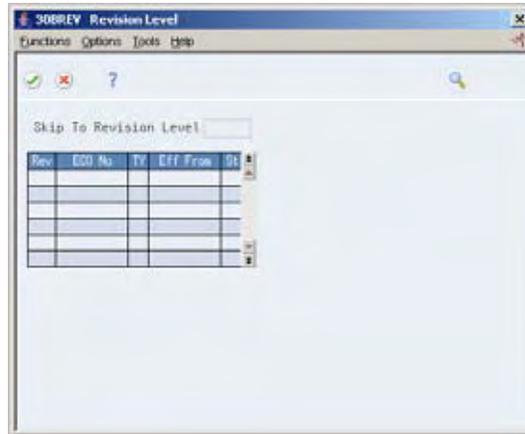
- Charge to Cost Center
- Cost Code

Field	Explanation
Charge to CC	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>The default business unit for journal entries for the work order. The business unit on the AAI tables must be blank.</p>
Cost Code	<p>A subdivision of an object account. Subsidiary accounts include more detailed records of the accounting activity for an object account.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control and Manufacturing Accounting:</p> <p>If a value is not entered in the AAI table for subsidiary account, the system uses this value as a default in journal entries.</p>

To enter a revision level

On Enter/Change Order

1. Do one of the following:
 - Complete the following field:
 - Revision Level
 - Access the list of revision levels from which you can select for the work order by pressing F1.



2. On Revision Level, select the revision level to be placed on the work order header.
The system closes the Revision Level window.
3. On Enter/Change Order, add the revision level to the work order header by pressing Enter.

Field	Explanation
Revision Level	Indicates the revision level of a bill of material. It is usually used in conjunction with an engineering change notice or order (ECN or ECO). The revision level of the bill of material should match the revision level of its associated routing (data item RREV), although the system does not check this. This value is defined and maintained by the user.

See Also

- *Work with PC Import/Export* in the *Technical Foundation Guide*

Processing Options

See [Manufacturing Work Order Entry \(P48013\)](#).

Attaching the Parts List Interactively

	From Shop Floor Control (G31), choose Discrete Daily Order Preparation From Daily Order Preparation - Discrete (G3111), choose Enter/Change Order
---	--

After you enter your work order header, you attach a parts list to it. You can attach the parts lists:

- Interactively, using a function key
- Manually, entering the parts
- In batch mode, using Order Processing

If a bill of material already exists in the system for the item, you can copy the bill of material information into the parts list. You can then attach this parts list to your order. You attach the parts list interactively using function keys.

After you attach the parts list to your work order header, you can:

- Specify or change a substitute item or quantities from different locations
- Choose substitute items and their quantities on hand when a component shortage is encountered

Use a processing option 18 for Enter/Change Order to specify the substitute processing that you want to use:

- Commit using the commitment control set in Manufacturing Constants
- Commit using the commitment control set in Manufacturing Constants, but use substitutes for shortages
- Commit using the commitment control set in Manufacturing Constants, but use substitutes if the quantity available can cover the shortage
- Commit using the commitment control set in Manufacturing Constants, but display substitute availability when substitute quantity available can cover the shortage

Attaching the parts list interactively includes the following tasks:

- Attaching the parts list
- Entering substitutions (optional)
- Choosing substitute items (optional)
- Entering multiple locations (optional)

What You Should Know About

Attaching the parts list manually

You use the manual method to change a part on the bill of material or attach different substitutes. Or, you can change these parts after interactive or batch attachment.

See *Processing Work Orders*.

Attaching the parts list using the batch program

Use the Order Processing program, and the appropriate processing option, to attach the parts list to the work order header.

See *Processing Work Orders*.

Copying a parts list from one work order to another

You can copy the parts list of a previously entered work order and attach it to a new work order. To do so:

- Locate the parts list of the existing work order
- Change the order number to the new work order
- Add the record

Parts list substitutions

In order to have parts list substitutions performed automatically, the Manufacturing Constants (P3009) must be set to hard commit at the creation of the parts list.

Bill of Material substitutes may be used in a soft commit environment. Once the parts list has been created, option 7 can be taken against a component on the Work Order Parts List program (P3111) to bring up the Substitute Availability Window. After a selection has been made, the soft commitments for the original component are relieved, whilst the substitute items are added to the parts list and their quantities soft committed.

Item Cross-Reference substitutions can also be entered on items in a parts list. They can only be entered manually.

Parts list and grade-controlled lots

To help ensure product quality, a warning message is generated when the component being attached is defined as a grade-controlled lot and the grade falls outside the valid grade range.

Using the generic text window

Access Work Order Component Master Text to create a separate generic text entry for each work order. This window enables you to provide more information and specific instructions per order. Any modifications you make to the text will not impact the text that was originally attached to the bill of material.

You can also access the User Information and Text Model Selection windows to view user and date updates, as well as model selections.

Warehouse Management interface

If you use Warehouse Management and generate a parts list, the system searches for inventory in the staging or work center location. If you did not define a staging or work center location or inventory is not located, the system generates a pick request. The pick request notifies you of the need for materials from the warehouse.

After the system creates the pick request, the Warehouse Management system processes instructions and creates suggestions for you to confirm. Then, the system updates the parts list and increases the quantity on hand for the To location and decreases the quantity on hand for the From location.

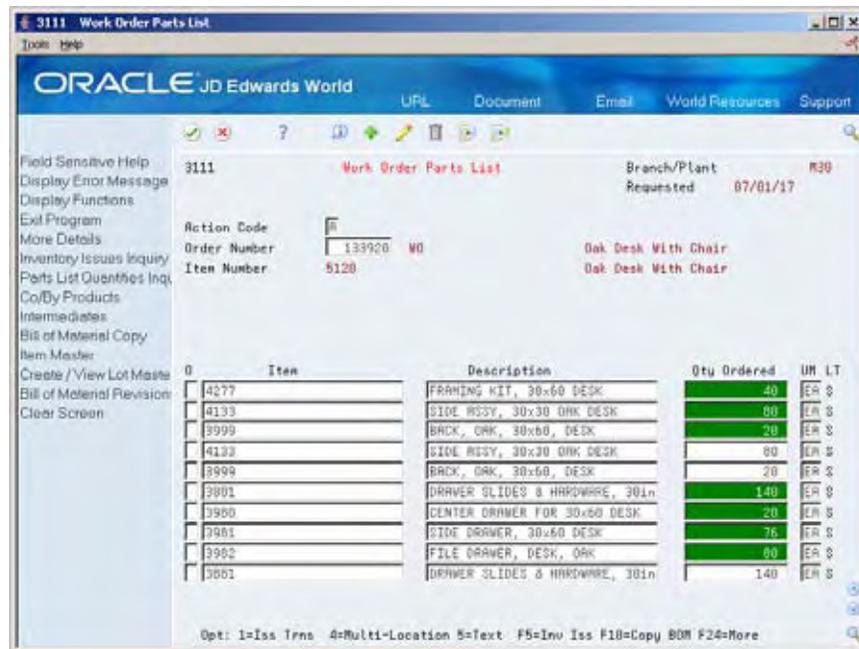
When you recreate the parts list and the items are in warehouse two things can occur:

- Order Processing (P31415) prints In Warehouse for all items with the proper material status code
- Order Processing (P31410) prints a message indicating warehouse pick request exists, parts list not generated

To attach the parts list

On Enter/Change Order

1. Choose Work Order Parts List.



2. On Work Order Parts List, choose the appropriate function key to copy the bill of material.
3. Add the bill of material to the parts list.
4. Review the following fields:

- Item
 - Quantity Ordered
 - Description
 - Quantity Ordered Unit of Measure
 - Line Type
5. Access the detail area.

Item	Description	Qty Ordered	Unit of Measure
4277	FRAMING KIT, 30x60 DECK	40	EA

Operations Seq: 10.00
 Requested: 06/24/17
 Revision Level: []
 Material Status: []
 From Grade: []
 From Potency: []
 Fixed/Variable: F
 Issue & Receipt: 1
 Oper Scrap %: .00

Branch/Plant: R30
 Location: []
 Issue Type Code: T
 Through Grade: []
 Through Potency: []
 Supplier: []
 Memo Lot 1: []
 Memo Lot 2: []

Opt: 1=Iss Trns 4=Multi-Location 5=Text F5=Inv Iss F10=Copy BOM F24=More

6. Review the following fields:

- Revision Level
- Material Status
- Location
- Lot
- Operations Sequence
- Requested
- Fixed/Variable
- Issue Type Code
- Branch/Plant
- From Potency
- Through Potency
- From Grade
- Through Grade
- Supplier

- Issue and Receipts

Field	Explanation
Description	A brief description of an item, a remark, or an explanation.
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant.
LT	<p>A code that controls how the system processes lines on a transaction. It controls the systems with which the transaction interfaces (General Ledger, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management). It also specifies the conditions under which a line prints on reports and is included in calculations. Codes include:</p> <p>S Stock item</p> <p>J Job cost</p> <p>N Non-stock item</p> <p>F Freight</p> <p>T Text information</p> <p>M Miscellaneous charges and credits</p> <p>W Work order</p>
UM	<p>A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>If you leave this field blank for an existing component, the system uses the value in the Bill of Material Master table. If you leave this field blank for a new component, the system uses the component unit of measure from the Item Master table. For both of these situations, the system updates the quantities in the Item Location table in primary unit of measure.</p>

Field	Explanation
Operations Seq	<p>In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.</p> <p>In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.</p> <p>In engineering change orders, this number is used to sequence the assembly steps for the engineering change.</p> <p>Skip To fields allow you to enter an operation sequence that you want to begin the display of information.</p> <p>You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.</p>
Revision Level	<p>The current revision level of a component on the bill of material. It is usually used with an engineering change notice or order (ECN or ECO).</p>
Material Status	<p>A code (table 31/MS) that identifies the current status of a particular component on the work order.</p>
Fixed/Variable	<p>Indicates if the quantity per assembly for an item on the bill of material varies according to the quantity of the parent item produced or is fixed regardless of the parent quantity. This value also determines if the component quantity is a percent of the parent quantity. Valid values are:</p> <p>F Fixed Quantity</p> <p>V Variable Quantity (Default)</p> <p>% Quantities are expressed as a percentage and must total 100%</p> <p>For fixed quantity components, the Work Order and MRP systems do not extend the component's quantity per assembly value by the order quantity.</p> <p>For Process Manufacturing, the system stores percent components. Therefore, the system treats zero batch sizes like variable quantity components, and treats batch sizes greater than zero like fixed quantity components.</p>

Field	Explanation
Issue Type Code	<p>A code that defines how the system issues each component in the bill of material from stock. In shop floor control, it indicates how the system issues a part to a work order. Valid codes are:</p> <p>I Manual issue (default)</p> <p>F Floor stock (no issue)</p> <p>B Backflush (when part is reported as complete)</p> <p>P Preflush (when parts list is generated)</p> <p>U Super backflush (at pay-point operation)</p> <p>S Sub-contract item (send to supplier)</p> <p>Blank Shippable end item</p> <p>You can issue a component in more than one way within a specific branch/plant by using a different code on the bill of material and work order parts list. The bill of material code overrides the branch/plant value.</p>
Potency	<p>A code that indicates the potency of the lot, which is expressed as a percentage of active or useful material (for example, the percentage of alcohol in a solution). The actual potency of a lot is defined in the Lot Master table (F4108).</p>
Grade	<p>This field contains the grade of a lot expressed as an alphanumeric code. The grade is used to indicate the quality of the lot. For example:</p> <p>A1 Premium grade</p> <p>A2 Secondary grade</p> <p>The grade for a lot is stored in Lot Master table (F4108).</p>
From Potency	<p>A number that indicates the minimum potency, or percentage of active ingredients, acceptable for an item.</p> <p>The system displays a warning message if you try to purchase or issue items that do not meet the minimum acceptable potency. The system does not allow you to sell items that do not meet the minimum acceptable potency.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>The From Potency field and the Through Potency field define the allowable percent of active ingredients for an item. The From Potency value should be less than the Through Potency value. These values are also used to determine the potency requirements of a component in a bill of material or an item in a purchase or sales order.</p> <p>For example, the value of the From Potency equals 70.000%, and the value of the Through Potency equals 80.000%. In this case, inventory allocations for this item are made for lots for which the potency is greater than or equal to 70.000%, and less than or equal to 80.000%.</p>

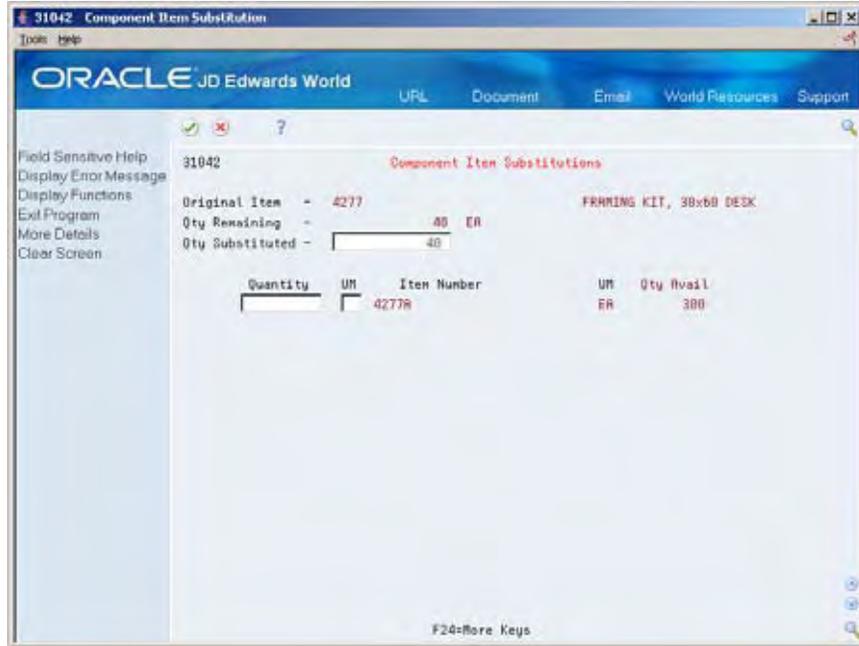
Field	Explanation
From Grade	<p>A code (system 40, type LG) that indicates the minimum grade that is acceptable for an item.</p> <p>The system displays a warning message if you try to purchase or issue items with grades that do not meet the minimum grade acceptable. The system does not allow you to sell items with grades that do not meet the minimum acceptable level.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>The From Grade and the Through Grade fields define the allowable grades for an item. The From Grade should be less than the Through Grade. These values are also used to determine the grade requirements of a component in a bill of material or an item in a purchase or sales order.</p> <p>For example, the value of the From Grade equals A01, and the value of the Through Grade equals A05. In this case, inventory allocations for this item will be made for lots for which the grade is greater than or equal to A01, and less than or equal to A05.</p>
Address Number - Input (Mode Unknown)	The address number you want to retrieve. You can use the short format, the long format, or the tax ID (preceded by the indicators listed in the Address Book constants).
Issue and Receipt	<p>Indicates if an item is under a pay on consumption agreement.</p> <p>Blank Purchases will be paid upon receipt of the item.</p> <p>1 Purchases will be paid when issued to the plant floor.</p>
Oper Scrap %	The system uses this value to increase or decrease the amount of materials to account for loss within the operation. The system updates this value on Enter/Change Bill of Material when you run the Planned Yield Update program. The system calculates this value by compounding the yield percentages from the last operation to the first operation. Use a processing option in Enter/Change Routing to enable the system to calculate the component scrap percent.

To enter substitutions

You can specify substitutions for the component items. To do this, enter the substitute quantities in the Component Item Substitutions form. If there is no quantity available, no information appears on this form.

On Enter/Change Order

1. Choose Work Order Parts List.
2. On Work Order Parts List, choose Component Item Substitutions.



3. On Component Item Substitutions, complete the following field:

- Quantity

4. Review the following default information:

- Quantity Substituted
- Unit of Measure
- Item Number
- Description
- Quantity Available

Field	Explanation
Qty Substituted -	The number of units affected by this transaction.

Field	Explanation
Unit of Measure as Input	The basic measurement used to designate the quantity of an inventory item. Examples are: BA bale LB pound BG bag MB per thousand pieces BU bundle MF per thousand feet BX box MW per thousand weight CB per hundred pieces PC piece CF per hundred feet PR pair CS per hundred square feet RL roll CW per hundred weight SF square feet DM drum SK skein DZ dozen TN ton EA each FT feet
Quantity on Hand - Primary units	The number of units that are physically in stock. The quantity on-hand displays in the primary unit of measure.

To choose substitute items

When the system encounters a component shortage, you can choose the available substitutes and quantity. After you enter the information, the system adds the selected items and quantities to the parts list and deducts the equivalent quantity from the component. You cannot access this form unless there is at least one quantity available.

On Enter/Change Order

1. Choose Work Order Parts List.
2. On Work Order Parts List, choose Substitute Availability.

Quantity	U/I	Item	U/I	On Hand	Quantity	Available
60	EA	3001	EA	1250		60

3. On Substitute Availability, review the following information:
 - Quantity
 - Item
 - Quantity on Hand
 - Quantity Available
4. Change the following field as needed:
 - Quantity
5. Select the record to place the equivalent quantity for the component in the parts list.

The system calculates this quantity using the substitute item setup values (fixed or variable, partial, and so on).

To enter multiple locations

You can specify more than one commitment location for the item. However, if you select a location that is not the primary location specified on the parts list, the system hard commits the item.

On Enter/Change Order

1. Choose Work Order Parts List.
2. On Work Order Parts List, choose Select Multiple Locations.

Quantity	Location	Lot	Brn/Plt	Available
140	10		M30	50
140	10		M30	200

3. On Select Multiple Locations, complete the following fields:

- Quantity
- Location
- Lot
- Branch/Plant

Field	Explanation
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant. <i>Form-specific information</i> If you select a location that is not the primary location specified on the parts list for a specific item, the system hard commits that item.
Available	The quantity available can be the on-hand balance minus commitments, reservations, and backorders. Availability is user defined and can be set up in branch/plant constants.

Attaching the Routing Instructions Interactively

	From Shop Floor Control (G31), choose Discrete Daily Order Preparation From Daily Order Preparation - Discrete (G3111), choose Enter/Change Order
--	--

After you enter your work order header, you attach the routing instructions to it. You can attach the routing instructions:

- Interactively, using a function key
- Manually, entering the routing instructions
- In batch mode, using Order Processing

You can copy the routing instructions from an existing work order and attach it to your work order header. You do this using a function key.

Before You Begin

- Verify that a record for the parent item exists in the Item Master and Item Branch tables
- Enter the document type, line type, and status code for the purchase order in the processing options for Order Processing

What You Should Know About

Attaching the routing instructions manually

You use the manual method to change a step in the operation that the Order Processing program assigns, or you can change this after interactive or batch attachment.

See *Processing Work Orders*.

Attaching the routing instructions using the batch program

Use the Order Processing program and the appropriate processing option to attach the routing instructions to the work order header.

See *Processing Work Orders*.

Locating a routing

When you locate a routing, the system displays the operations that are effective at the start date of the work order and those that are standard instructions or text lines. If a routing is not attached to the work order, no values appear in the fields.

Creating a purchase order for outside operations

You must create a purchase order for any step in the routing instructions that involves a subcontractor. Do this using the Enter/Change Routing program. After you enter purchase order information, supplier, type of operation, purchase order, and cost type, you may run the Order Processing batch program or interactively attach the routing to create the purchase order.

Changing the status of a routing operation

If you change the status of a routing operation, the system can create duplicate purchase orders for that operation.

Deleting an outside operation for a routing

If you delete an outside operation with an associated purchase order, the system deletes the purchase order if the original status of the routing operation remains unchanged. When the system deletes the purchase order, it updates the quantity on purchase order value for the primary location and the open amount in the supplier instructions.

Aligning work order start date and routing first operation start date

When using variable lead time, the work order start date and routing first operation start date frequently do not match due to differences in calculations. On the Manufacturing Work Order Entry program (P48013), processing option 33 can be set so that the work order start date is automatically updated with the start date of the first routing operation. Because it includes additional resource units that can be added to the Work Center Master, the routing first operation start date is considered more accurate.

Item records

A record for the item in the work order must exist in the Item Branch table (F4102). If the system does not find the record, it creates one in the table.

Attaching notes to a work order

Access the Notes window to create a separate generic text entry for each work order. This window enables you to provide more information and specific instructions per order. Any modifications that you make to the text will not impact the text that was originally attached to the item's routing.

You can also access User Audit Information and Select Notes Template to view user and date updates, as well as templates.

Using the Warehouse Management system

If you set up the work center as a valid location, the system checks the work center for availability before you use Warehouse Management.

6. Access the detail area.

3112 Routing Revisions

ORACLE JD Edwards World

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Item Search
Copy Routing Instruction
Equipment Search
Test Result Edit
Clear Screen

3112 Routing Revisions Branch/Plant R39
Requested 07/01/17

Action Code n
Order Number 133920 W0 Oak Desk With Chair
Item Number 5120 Oak Desk With Chair

Work Center	Oper Seq	Description	Machine	Labor	Prod
200-204	10.00	Assemble frame		20.00	Cons
Start	06/23/17	Op Typ	Rel PD	Setup Hours	2.50
Requested	06/24/17	Pay Pt	Equip	Queue Hours	.50
Next Oper.		Craft	Line/Cell	Move Hours	2.50
Overlap %		Crew	Inst No	Time Basis	1
Yield %	.00	Cum %	Supplier	Employee #	
Repl Loc		Resource		UOM	
200-204	20.00	Assemble sides/back to frame		16.00	Cons
Start	06/24/17	Op Typ	Rel PD	Setup Hours	
Requested	06/25/17	Pay Pt	Equip	Queue Hours	
Next Oper.		Craft	Line/Cell	Move Hours	
Overlap %		Crew	Inst No	Time Basis	1
Yield %	.00	Cum %	Supplier	Employee #	
Repl Loc		Resource		UOM	

Opt: 5=Text F4=Full Details F6=Item Search F10=Copy Routings F24=More

7. Review the following fields:

- Equipment
- Instruct Number
- Start
- Requested
- Type Operation
- Pay Point
- Crew
- Setup Hours
- Queue Hours
- Move Hours

Field	Explanation
Description - Line 2	A second, 30-character description, remark, or explanation.
Machine	This is the standard machine hours expected to be incurred in the normal production of this item.
Labor	<p>This is the standard hours of labor expected in the normal production of this item.</p> <p>The run labor hours in the Routing Master table (F3003) are the total hours it takes the specified crew size to complete the operation. The hours are multiplied by the crew size during shop floor release and product costing.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For engineering change orders:</p> <p>This is the standard hours of labor expected to complete this step for the ECO.</p>
Cons Prod	<p>This flag indicates whether consumed resources, produced resources, or both are defined for the operation. Possible values are:</p> <p>Blank No consumed or produced resources are defined for the operation.</p> <p>Cons Consumed resources (components, ingredients) are defined going into the operation.</p> <p>Prod Produced resources (co-products, by-products) are defined coming out of the operation.</p> <p>Both Both consumed resources (components, ingredients) and produced resources (co-products, by-products) are defined for the operation.</p> <p>Note: When using Process Manufacturing, if this field is highlighted, an intermediate exists for the operation.</p>
Yield %	<p>Represents the planned output yield percent for a step. The Planned Yield Update program uses this value to update the Cumulative Percent in the bill of material and the Operation Scrap Percent in the routing. Materials Requirements Planning uses the step scrap percent and the existing component scrap percent to plan component demand.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>This field is not input-capable. The system uses the value in the Routing table.</p>
Op Typ	<p>A user defined code (system 30, type OT) that indicates the type of operation. For example:</p> <p>A Alternate routing</p> <p>TT Travel time</p> <p>IT Idle time</p> <p>T Text (Enter text at Description)</p>

Field	Explanation
Pay Point Code	<p>A code that indicates if a work center will have labor, material, or both, backflushed through it when quantities are reported against operations occurring in the work center. The default value for this code is the routing sequence record unless overridden when the routing is defined. Valid codes are:</p> <p>0 Not a backflush work center B Backflush material and labor M Backflush material only L Backflush labor only P Preflush material only</p> <p>If you leave this field blank, the system uses the value in the Enter/Change Routing table.</p>
Crew	<p>The number of people who work in the specified work center or routing operation.</p> <p>The system multiplies the Run Labor value in the Routing Master table (F3003) by crew size during costing to generate total labor dollars.</p> <p>If the Prime Load Code is L or B, the system uses the total labor hours for backscheduling. If the Prime Load Code is C or M, the system uses the total machine hours for backscheduling without modification by crew size.</p>
% of Overlap	<p>The overlapping of successive operations. The actual overlap percentage entered for the operation sequence is the percent by which that operation overlaps the prior operation. For example, if you enter 80%, this indicates that work can begin on the overlapped operation when 20% of the prior operation is completed.</p> <p>Note:</p> <ol style="list-style-type: none"> Overlapping has no effect on move and queue calculations. The percent entered must be less than or equal to 100%. <p>Enter percents as whole numbers: 5% as 5.00</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>If you leave this field blank, the system uses the value in the Routing table.</p>
Unit or Tag Number	<p>A 12-character alphanumeric code used as an alternate identification number for an asset. This number is not required, nor does the system assign a number if you leave the field blank when you add an asset. If you use this number, it must be unique. For equipment, this is typically the number stenciled on the equipment.</p>

Field	Explanation
Time Basis	<p>A user defined code (system 30, type TB) that identifies the time basis or rate for machine or labor hours entered for any routing step. You can set rates per unit, per 10, per 1000, and so on.</p> <p>The system uses the values in the Description-2 field on the User Defined Codes form for costing and scheduling calculations. The description is what the code represents, but is not used in calculations.</p>
Setup Hours	The standard setup hours you expect to incur in the normal completion of this item.
Queue Hours	<p>The total time (in hours) that an order is expected to be in queue at work centers and moving between work centers.</p> <p>The system stores this value in the Item Branch table (F4102). You can calculate this value using the Leadtime Rollup program or you can enter it manually. When you run the Leadtime Rollup program, the system overrides manual entries with calculated values.</p>
Move Hours	<p>The planned time in hours that is required to move the order from this operation to the next operation in the same work center.</p> <p>If the Routing Master values are blank, the default value comes from the work order routing. However, the system uses these values only for backscheduling variable leadtime items.</p>

See Also

- *Processing Work Orders (P31410)* for instructions on running the Order Processing batch program

Assigning Serial Numbers

	From Shop Floor Control (G31), choose Discrete Daily Order Preparation From Daily Order Preparation - Discrete (G3111), choose Enter/Change Order
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Alternatively, you can choose Assembly Serial Numbers from the Daily Order Preparation - Discrete menu (G3111). However, if you access Assembly Serial Numbers from the menu, you can use it only to locate existing serial numbers. You cannot update or add serial numbers when you access this program from the menu.

You assign serial numbers to your work orders to track serialized items within lots. You can assign serial numbers to work orders at any time. When you enter serial numbers, the system creates Serial Number Master records, as well as Work Order (Lot/Serial Numbers) LSNs. The system does not validate any serial number that you enter until you complete the work order. If you do not assign a serial number to a serialized assembly, the system requires a number before you can complete the

work order. After you complete a work order, you cannot modify any serial numbers that are assigned to the assemblies.

You can assign serial numbers to specific assemblies at any time prior to completing the work order using Assign Work Order LSN. You can also assign serial numbers to specific assemblies at the time of work order completions using Associate Issued Item LSN's. You can associate serialized components to a specific assembly either at inventory issues or work order completions. You must issue serialized components in their respective primary unit of measure to allow for association.

Assembly Serial Numbers assumes a quantity of one in the unit of measure on the work order. For serialized assemblies, this will be the primary unit of measure. You cannot enter more serial numbers than the quantity on the work order.

Before You Begin

- Set the Lot Process Type and Serial Number Required fields on the Item Master Information form for serial number processing

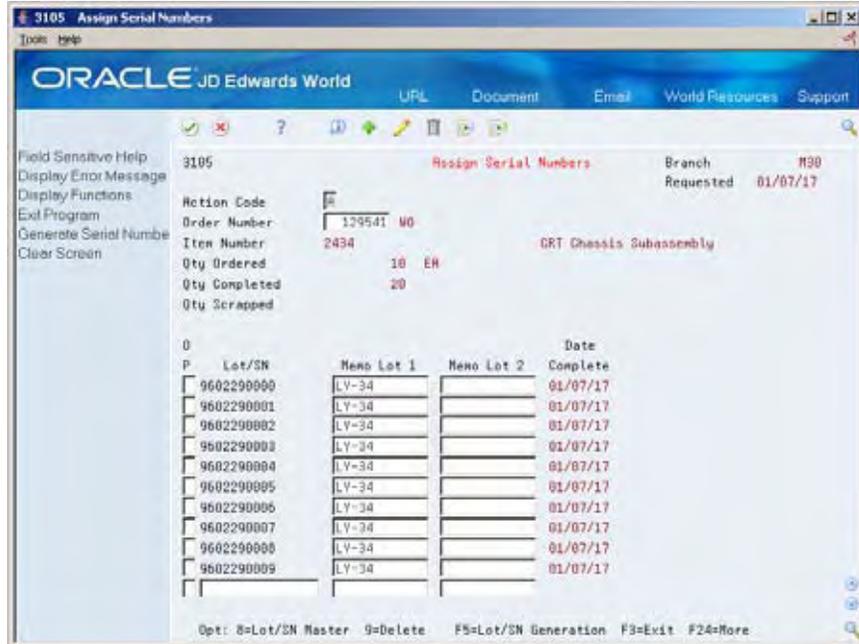
What You Should Know About

Deleting serial numbers You can only delete serial numbers if there is no activity detected for the number.

To assign serial numbers

On Enter/Change Order

1. To locate the work order you want to assign serial numbers to, complete the following field:
 - Order Number
2. Choose Assign Serial Numbers.



3. On Assign Work Order LSN's, choose LSN Generation to assign serial numbers to your work order.
4. To view the serial numbers that were assigned, relocate your order number.

Process Work Orders

Processing Work Orders

After you enter a work order header, you use the Order Processing batch program to generate shop paperwork, including the parts list and routing instructions, for each work order header. The program's processing options allow you to perform a wide range of functions. You can:

- Choose to generate a parts list, the routing instructions, or both
- Indicate the date to use for effectivity checking
- Change the status code of the work orders processed
- Choose to print various information about the work order, such as the routing, parts list, sales order text, and so forth
- Print a shop packet summary that lists processed work orders
- Enter the unit of measure for backscheduling
- Issue inventory automatically through a batch program
- Choose to generate a shortage report for the work orders
- Indicate which versions of associated programs you want to access
- Enter sales order information for kit processing and print the text lines of sales orders
- Create work orders against prior revision levels
- Record activities using bar code capabilities when printing the pick list or the exception report

You can organize and separate these functions by setting up several DREAM Writer versions with different data selection and processing option values to accomplish different tasks. For example, you could set up one version to generate the parts lists and routings for work orders, another version to print shop paperwork, and one version to perform batch inventory issues.

This section contains the following:

- [Run Order Processing](#)
- [Printing a Summary of Work Orders](#)

Before You Begin

- Determine which processing options to use before running this program.
- Set up valid work center locations. See *Setting Up Work Centers*.

- Use the processing options to initiate Warehouse Management system integration. See *Advanced Warehouse Management Guide* for information about setting up Warehouse Management.

What You Should Know About

Processing assembly inclusion rules for work orders created from configurator

Use Order Processing to process assembly inclusion rules from configurator and generate a parts list and routing, if they do not already exist.

Use rule type Q for components that the system will write only to the Shop Floor Control Parts List table (F3111). The system uses the Issue Type Code and Operations Sequence fields from the Assembly Inclusion Rules table (F3293) in this processing.

Use rule type P to:

- Print components on the sales order as separate line items
- Display different levels for configured components during Sales Order Entry

The system generates a parts list as follows:

- Using data from the Sales Order Detail table (F4211) generated from the parts list rules during Sales Order Entry to create records in the Shop Floor Control Parts List (F3111)
- Processing rule type Q for components to write additional components to the parts list

The system generates a routing by processing the related routing rules.

Blending, filling, and packaging

The system checks for any incompatibility between blending tank's or fill line's associated allowed product matrix and the work orders parts list, and displays any errors.

See *Bulk Stock Management Guide*.

Regenerating the parts list

When you run Order Processing, the system deletes any previously generated or manually entered parts list that is attached to the work order. You can manually enter changes to the system-generated parts list. If you add parts to the list, the system commits them from the primary location in the Item Location program.

You should *not* regenerate the parts list if any part on the list has been issued to the work order. If you regenerate the parts list after material has been issued, you must manually adjust the list to prevent duplication of component quantities. You should also be aware that the Work Order Variance file (F3102) will be incorrect if you regenerate the parts list after material has been issued.

Regenerating the routing instructions

When you run Order Processing, the system deletes any previously generated or manually entered routing. You should not regenerate the routing instructions for the work order if hours and quantities are recorded against any of its operations.

You can set the processing options for order entry to update the routing instructions if you change the work order. The system recalculates the run labor and run machine hours based on the quantity ordered on the work order.

If the system finds an error in calculating the date for an operation sequence, it enters the work order start and requested dates for that operation.

Consolidating a parts list

Use a processing option to print a consolidated parts list which provides you with a means to pick inventory needed for the manufacturing process. You may process many work orders in a single run.

The items are consolidated based on item name, location, lot, unit of measure, and branch/plant. The system prints each branch/plant encountered on a separate page and prints each occurrence of an item that is in a different location, lot, or unit of measure on a separate line.

Parts list substitutions

If substitutes have been defined for items on the parts list and processing option 23 has been set on Generate and Print Work Orders (P31410), substitutions will be made automatically, so long as the Manufacturing Constants (P3009) are set to perform a hard commit at the creation of the parts list. When selecting substitutes, the system will look at the availability of substitute items based on the order that they appear on the Component Substitutes screen (30025).

Bill of Material substitutes may be used in a soft commit environment. Once the parts list has been created, option 7 can be taken against a component on the Work Order Parts List program (P3111) to bring up the Substitute Availability Window. After a selection has been made, the soft commitments for the original component are relieved, whilst the substitute items are added to the parts list and their quantities soft committed.

Item Cross-Reference substitutions can also be entered on items in a parts list. They can only be entered manually.

Warehouse Management interface

If you use Warehouse Management and process a work order, the system does not search for inventory. Instead, the system generates a pick request. The pick request notifies you of the need for materials from the warehouse.

After the system creates the pick request, the Warehouse Management system processes instructions and creates suggestions for you to confirm. Then, the system updates the parts list and increases the quantity on hand for the To location and decreases the quantity on hand for the From location.

You can specify in the processing options if you want a consolidated pick list for multiple work orders to be printed, as well as the individual pick lists.

Quality Management test results

As you process work orders, you can use processing options to set values for the status of the work order and operation lot if the tests fail.

See *Working with Test Results* in the *Quality Management Guide* for more information.

See Also

- *Appendix B — Leadtimes* for an explanation of the calculation of fixed and variable leadtimes

Run Order Processing



From Shop Floor Control (G31), choose **Discrete Daily Order Preparation**
From Daily Order Preparation - Discrete (G3111), choose **Order Processing**

When you run Order Processing, the system creates the engineering variance in the Work Order Variance table (F3102). The variance shows the difference in costs from when the standards were set.

Note: When you use Order Processing to generate parts lists or routings for your work orders, the system replaces any parts lists or routings that were previously attached to the work orders.

When you run Order Processing the system generates an exception report if:

- The system previously created pick requests but did not re-generate a parts list
- The system did not create a pick request because “Warehouse Control” was not set to Y

Processing Options

See [Generate and Print Work Orders \(P31410\)](#).

Printing a Summary of Work Orders

	From Shop Floor Control (G31), choose Discrete Periodic Functions From Periodic Functions - Discrete (G3121), choose Work Order Summary
---	--

The Work Order Summary report lists selected work orders in the Work Order Master table (F4801). You can use this report to review work orders in your system. The report shows the planner ID, item number, order quantity, completed quantity, and start and due dates.

31400		JD Edwards World					Page	-		2
		Work Order Summary					Date	-		3/17
W.O						Quantity		Dates		
Number	Ty	Description	T P St	Planner	Item Number	Ordered	Completed	UM Started	Due	

400	WO	Rework Electrical	R H 10						11/19/17	
764	WO	Electrical	D H 10	55222					07/01/17	
772	WO	Electrical Phase II	D H 10	55222					07/01/17	
781	WO	Electrical Phase III	D H 10	55222					07/01/17	
799	WO	Other Electrical	D H 10	55222					07/01/17	
801	WO	Electrical	D H 10	55222					07/01/17	
810	WO	Hydraulic	D H 10	55222					07/01/17	
828	WO	Structural	D H 10	55222					06/30/17	
941	WO	Quote for Engineering Ph	Q 10	7020					07/01/17	
959	WO	Quote for Engineering Ph	Q 10	7020					07/01/17	
967	WO	Quote for Engineering Ph	Q 10	7020					07/01/17	
975	WO	Text Template for Quotes	G 10						07/01/17	
983	WO	Text Template for Quote	G 10						07/01/17	
1901	WO	Replacement of Air Handl	1 1 MH			1			05/26/17	
1919	WO	Convert Off. to Conferen		6001		1			08/07/17	
2065	WO	OAK SHELF UNIT	97	9200				11/26/17	06/22/17	
2137	WO	Replace locks							11/19/17	
2305	WO	Safety Inspection	M H	7701		1			05/25/17	
2318	WO	Oil Change	M 2 IA	7701		1			02/26/17	
2327	WO	Rotate Tires	M M			1			05/25/17	
2381	WO	Stain, assemble material							11/12/17	
2399	WO	Install shelves: wall, f							09/28/17	
2401	WO	Cabinet trimwork, cleanu							11/12/17	
2468	WO	Install bookcases.							11/12/17	
2487	WO	Replace Pump Motor	1 1 MA	55222		1		04/01/18	05/28/17	
2604	WO	Purchase of Software							10/08/17	
2605	WO	Purchase of Software	IA						10/08/17	
2612	WO	Software implementation							10/08/17	
2621	WO	Safety Inspection	6 3 ML	7701		1		01/01/18	05/28/17	
2647	WO	Safety Inspection	6 3 ML	7701		1		01/01/18	05/26/17	
2663	WO	Safety Inspection	6 1 MA	7701		1		01/15/18	05/25/17	
3084	WO	Safety Inspection	6 3 MA	7701		1		01/09/18	05/25/17	
3228	WO	Safety Inspection	6 3 50	7701		1		01/09/18	03/03/17	
3236	WO	Safety Inspection	6 3 MA	7701		1		01/09/18	05/25/17	

Understand Commitments Overview

About Commitments

A commitment is a reservation for the parts that are needed on a work order. You can define commitments by branch or work center. You can change commitments manually or through a batch program.

When you attach a parts list to a work order header, the system creates commitments for the required quantity of each component. The commitment reserves the material for a particular work order.

The JD Edwards World system allows you to use hard commitments or soft commitments in a work order, or let the system change the commitment from soft to hard when you process the work order. You can also set up the system to place a soft commitment at the inception of the work order, and change it to a hard commitment as the start date of the work order approaches.

If, at any time, the location specified on the parts list is not the primary location, the system hard commits that line item.

Inventory remains committed until the system records the issues. Then, the system reduces the on-hand quantity and the committed quantities.

If you use lot processing, the system creates commitments based on the lot expiration dates, and grade and potency ranges for the lot numbers.

The parts list for the work order might specify a range of grade or potency values that can be used on the order. The system commits the lot of the grade or potency within the range you defined for the item. The system can also search inventory that you need for the order in a certain sequence. For example, you might want to specify a specific lot number, grade, or potency.

Use the following table to identify the processing options available for both the Enter/Change Order and Order Processing programs.

Program	Description
Enter/Change Order	Automatically generate: <ul style="list-style-type: none">▪ Routing instructions when you create the parts list online▪ Parts list when you create the routing instructions online

Program	Description
Order Processing	<p>Specify:</p> <ul style="list-style-type: none">▪ Either the work order effective date or start date for effectivity checking <p>Automatically:</p> <ul style="list-style-type: none">▪ Use substitutes for items out of stock and blanket order release processing▪ Generate the parts list, or routing instructions, or both

What Is a Soft Commitment?

A soft commitment allows you to tentatively commit the inventory to a work request, although the inventory is not physically set aside and might be used for another work order. Soft commitments also enable you to compare material that is needed for current work requests to available inventory.

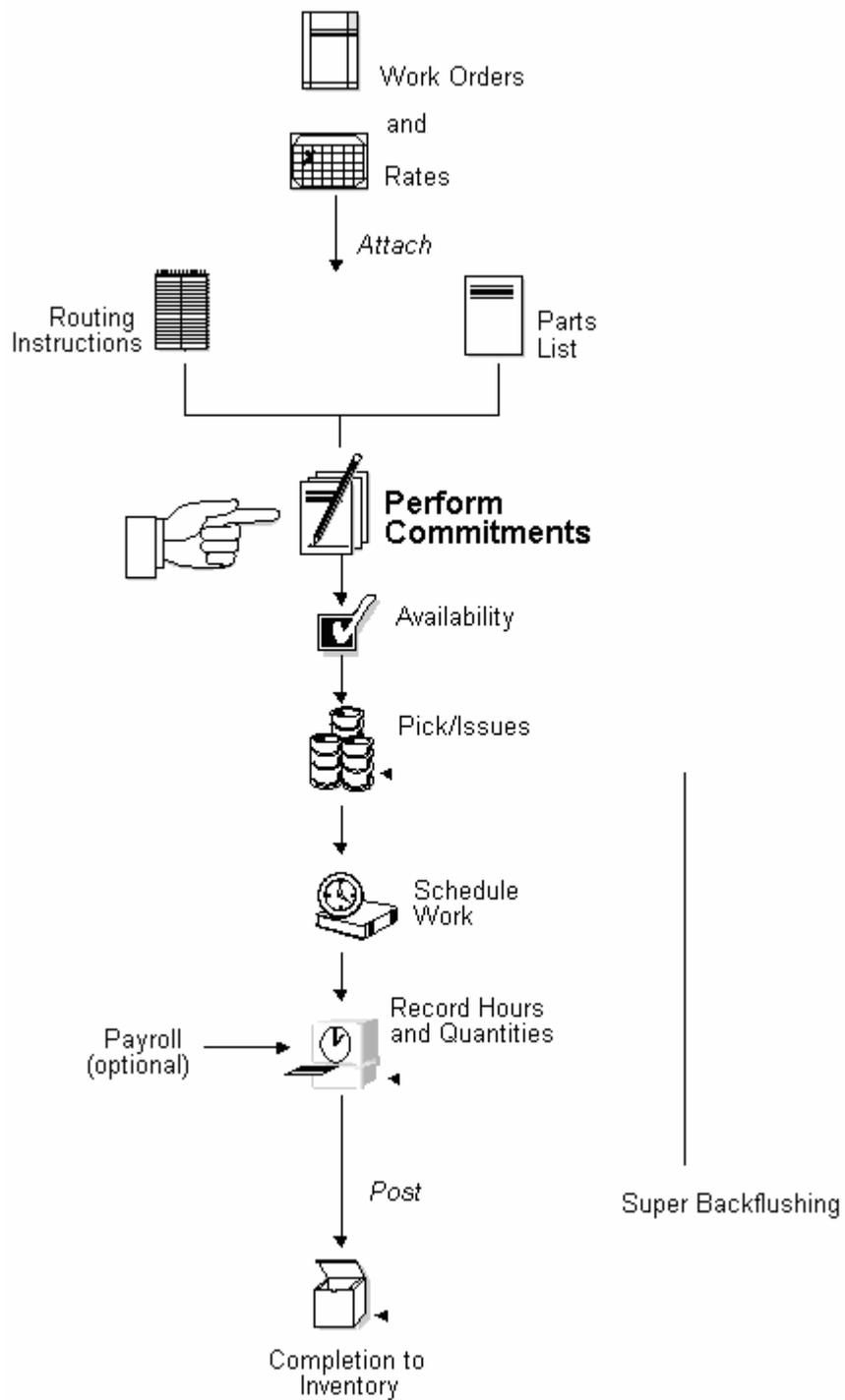
What Is a Hard Commitment?

A hard commitment physically designates inventory in a specific location to a particular work order.

See Also

- *Understanding Lot Processing*
- *Understanding Grade and Potency*

Where in the Process Do You Commit Inventory?



Work with Commitments

Working with Commitments

When a parts list is attached to a work order header, either manually or using the batch program, the system automatically creates commitments for the components.

When you define commitments, you set up the parameters that determine how the commitment is made. If you are using lot control, you also manage commitments by grade and potency. Repost commitments when you need to clear commitments and reassign quantities to other work orders.

This section contains the following:

- [Defining the Commitment Rules](#)
- [Defining Commitments at a Work Center Location](#)
- [Managing Commitments for Grade and Potency Controlled Items](#)
- [Creating Commitments for Potent Units](#)
- [Reposting Work Order Commitments](#)

What You Should Know About

Activating substitution checking

When the system creates commitments, either manually or using the batch program, you can activate a processing option to verify if substitutes exist for an item. When you create commitments manually, the item number is highlighted during the attachment process.

Defining the Commitment Rules

When you create a commitment manually or using the batch program, you must define commitment rules for the work order:

- Define the commitment method for the item
- Define the commitment control and type of commitment

To define the commitment method for the item



From Inventory Management (G41), choose **Inventory Master/Transactions**
From Inventory Master/Transactions (G4111), choose **Item Branch/Plant Information**

You can define the method that the system uses when creating a commitment. These methods are by location, lot number, or lot expiration date.

On Item Branch/Plant Information

Complete the following field:

- Commitment Method

Field	Explanation
Commitment Method	<p>A code that indicates the method that the system uses to commit lot items from inventory. Valid codes are:</p> <ol style="list-style-type: none"> The normal commitment method for inventory (default). The system commits inventory from the primary location and then from secondary locations. The system commits inventory from the locations with the most inventory before committing inventory from locations with the least. The system commits backorders to the primary location. The inventory commitment method by lot number. The system commits inventory by lot number, starting with the lowest lot number and committing orders to available lots. The inventory commitment method by lot expiration date. The system commits inventory from the locations with the earliest expiration date first. The system considers only locations with expiration dates greater than or equal to the sales order or parts list requested date.

To define the commitment control and type of commitment



From Shop Floor Management (G31), choose **Shop Floor Control Setup**
From Shop Floor Control Setup (G3141), choose **Manufacturing Constants**

You can define the commitment control method and type of commitment for the work order. The control determines how the system commits inventory to a work order, and limits the inventory location to which commitments are made. The type specifies whether the commitment is soft, hard, or starts out soft and later becomes hard.

On Manufacturing Constants

Complete the following fields:

- Commitment Control
- Hard/Soft Commit

Field	Explanation
Commitment Control	<p>Determines how the system commits inventory to a work order, and limits the inventory location to which commitments are made. The system activates this field only when you create hard commitments. Valid codes are:</p> <ol style="list-style-type: none"> <li data-bbox="719 401 1312 457">1 Make commitments to the primary location in the branch/plant where the work order originates. <li data-bbox="719 474 1349 646">2 Split the parts list and commitments to fill any component shortages. The system can cross branch boundaries to fill requirements. In this case, the system uses the next alphabetical branch/plant listed in the table that occurs after the branch/plant on the work order header. For example: CAL CHI CLE HOU If the system starts committing inventory at branch/plant CHI, it accesses CLE as the next branch/plant. If inventory is low in all locations, the system makes the remaining commitments to the primary location of the branch/plant on the work order header. <li data-bbox="719 1024 1273 1081">3 Same as 2, but the system cannot cross branch boundaries. <p>When you set the Commitment Method field in the Item Branch/Plant table to 2 or 3 (lot number or expiration date control), you must set this field to 3.</p>
Hard/Soft Commit	<p>Determines how the Shop Floor Control system commits inventory. Valid codes are:</p> <ol style="list-style-type: none"> <li data-bbox="719 1287 1292 1371">1. The system performs a hard commitment at the creation of the parts list. The hard commitment remains in effect until inventory is relieved. <li data-bbox="719 1388 1349 1535">2. The system performs a soft commitment at the creation of the parts list. Changed to a hard commitment during the pick list print process for the work order. The hard commitment remains in effect until inventory is relieved. <li data-bbox="719 1551 1333 1635">3. The system performs a soft commitment at creation of the parts list. The soft commitment remains in effect until inventory is relieved. <p>For World: When the hard/soft commit option is set to 2 or 3, any line item in the parts list may be hard committed prior to printing or relieving the inventory.</p> <p>Note: When you set the Commitment Method field in the Branch/Plant Constants form to 2 or 3, you must use 1 or 2 for this field because a hard commitment must be performed.</p>

Defining Commitments at a Work Center Location

Defining commitments at a work center consists of:

- Defining the location at the work center
- Defining the work center and location in the items routing
- Defining the branch and parent item for the bill of material
- Defining how the system commits inventory during the backflush process for the work center

To define the location at the work center



From Product Data Management (G30), choose **Daily PDM Discrete**
From Daily PDM Discrete (G3011), choose **Enter/Change Work Center**

On Enter/Change Work Center

The screenshot shows the 'Enter/Change Work Center' form in Oracle JD Edwards World. The form is titled '3006 Enter/Change Work Center' and includes a 'Branch/Plant' field set to 'M20'. The form is divided into several sections:

- Action Code:** R-112
- Work Center:** R-112
- Dispatch Group:** R-112
- Work Center Type:** 0
- Calendar Name:** (empty)
- Pay Point Code:** (empty)
- Prime Lead Code:** (empty)
- Critical Work Center:** (empty)
- Crew Size:** 1.0
- Number of Machines:** 2
- Number of Employees:** 2
- Queue Hours:** (empty)
- Move Hours:** (empty)
- Resource Offset:** (empty)
- Efficiency:** 100.00
- Utilization:** 100.00
- Previous Product:** (empty)
- Cut-off:** (empty)
- Blending/Filling W/C:** (empty)
- Location - Issue:** R-112
- Location Branch:** M20
- Location - Completion:** (empty)
- Capacity Std:** (empty)
- Capacity UOM:** (empty)
- Capacity Min:** (empty)
- Capacity Max:** (empty)

At the bottom of the form, there is a table for 'Hours' and 'Shift Code / Description' with several empty rows. The footer of the form includes the text: 'F8=Work Center Rates F10=Business Unit Revisions F24=More Keys'.

Complete the following fields:

- Work Center
- Location - Issue

To define the work center and location in the items routing



From Product Data Management (G30), choose **Daily PDM Discrete**
From Daily PDM Discrete (G3011), choose **Enter/Change Routing**

Field	Explanation
Location	A code that identifies inventory locations in a branch/plant. You define the format of the location identifier by branch/plant. <i>Form-specific information</i> This field overrides the location defined in the work center master, which allows for multiple work center locations.

To define the branch and parent item for the bill of material



From Product Data Management (G30), choose **Daily PDM Discrete**
From Daily PDM Discrete (G3011), choose **Enter/Change Bill**

On Enter/Change Bill

Component Item	Description	Quantity Per	UM	V	I
2034	Rear Assembly, Touring	1	EA	V	B
9102	50mm Steel Tubing	160	CM	V	B
2040	Head Tube, Light	1	EA	V	B
2047	Bottom Tube	1	EA	V	B
2037	Front Fork, Touring	1	EA	V	B

- Complete the following fields:
 - Branch/Plant
 - Parent Item
- Access the detail area.

3. Complete the following field:
 - Operation Sequence
4. Choose BOM Component Master Text.

5. Create a separate generic text entry for a component item of the parent item.
This window enables you to provide more information and specific instructions per component. You can also use the User Information and Text Model Selection windows to view user and date updates, as well as model selections.

What You Should Know About

Attaching notes

Access the Notes window to create a separate generic text entry for each operation sequence of the routing. This window enables you to provide more information and specific instructions per step. You can also access the User Audit Information and Select Notes Template windows to view user and date updates, as well as templates.

Blending, filling, and packaging

Use the Enter/Change Bill program to add parts associated with a manufacturing product. The system allows a percent bill to be added to 100% and additional quantities to include fixed or variable definitions.

See *Bulk Stock Management Guide*.

To define how the system commits inventory during backflush

From Shop Floor Management (G31), choose **Shop Floor Control Setup**
From Shop Floor Control Setup (G3141), choose **Manufacturing Constants**

On Manufacturing Constants

Field	Value
Action Code	C
Branch	R20 Valley Forge Hfg/Dist. Ctr
Log Bill of Material Changes	<input type="checkbox"/>
On-Line BOM Validation (Y/N)	<input checked="" type="checkbox"/>
Log Quality Management Changes	<input type="checkbox"/>
Overheads as Percents or Rates	<input type="checkbox"/>
Modify cost by Work Center Eff	<input checked="" type="checkbox"/>
Include Efficiency in Overhead	<input checked="" type="checkbox"/>
Include Var. Labor Overhead in cost	<input checked="" type="checkbox"/>
Calculate Var. on Direct Labor	<input checked="" type="checkbox"/>
Calculate Var. on Setup Labor	<input checked="" type="checkbox"/>
Include Fixed Labor Overhead in cost	<input checked="" type="checkbox"/>
Calculate Fixed on Direct Labor	<input checked="" type="checkbox"/>
Calculate Fixed on Setup Labor	<input checked="" type="checkbox"/>
Include Var. Machine Overhead in cost	<input checked="" type="checkbox"/>
Include Fixed Machine Overhead in cost	<input checked="" type="checkbox"/>
Backflush Options	<input type="checkbox"/>
Master Routings (Y/N)	<input checked="" type="checkbox"/>
Commitment Control	<input type="checkbox"/>
Hard/Soft Commit	<input type="checkbox"/>
Percent Bill Validation	<input type="checkbox"/>
Status for Changes	<input type="checkbox"/>
Work Hours Per Day	16.00
Hours	8.00
Shift Code / Desc.	1 Day
Actual Costing Only	<input type="checkbox"/>
Labor Rate Source	<input type="checkbox"/>
Machine Rate Source	<input type="checkbox"/>

Complete the following field:

- Backflush Options

Field	Explanation
Backflush Options	<p>Determines how the system performs commitment and release of inventory during the backflush process. Valid codes are:</p> <ol style="list-style-type: none"> 1 Create a standard parts list based on the value in the Commitment Control field in the Manufacturing Constants table (F3009). 2 Create a parts list, committing to the location indicated in the Work Center Master table (F30006). The Operation Sequence field in the Bill of Material table (F3002) determines the work center that is used. <p>Note: You must create the work order routing before the parts list. If you are running work order generation, the work order routing and the parts list must be created at the same time.</p>

Managing Commitments for Grade and Potency Controlled Items

	<p>From Shop Floor Control (G31), choose Discrete Daily Order Preparation</p> <p>From Daily Order Preparation - Discrete (G3111), choose Enter/Change Order</p> <p>From Enter/Change Order, choose Parts List</p>
---	--

Grade and potency controlled items must be lot controlled. When the system creates commitments for grade and potency controlled items, it moves the grade and potency range to the parts list. Only those lots within the range are eligible for commitments. The system makes the commitments in date sequence.

For example:

	Location	Exp. Date	Grade	On Hand	Commit
P					50
S	9406220000	08/31	A01	50	50
S	9406230000	08/15	A02	300	300
S	9406240000	12/12	A03	400	400
S	9406250000	09/01	A04	5	
S	9406260000	09/01	A05	5000	

In the above example, the work order quantity required is 800, and the grade range is A01-A03.

The system commits the quantities using the primary unit of measure. If all of the commitments cannot be made against specified lots in the range, the system commits the remainder to the primary location at standard grade or potency.

See Also

- *Understanding Grade and Potency*

Creating Commitments for Potent Units

When you define a unit of measure as a potent unit of measure, and the system creates commitments, the system converts the quantity to the primary unit of measure. For example, if the primary unit of measure is GA (gallons), the component unit of measure is GP (potent gallons), and the standard potency is 70%, the parts list requires 500 GP.

	Location	Potency	On Hand	Potent Units	Commit at standard & 70%
P					43
S	9406220000	80%	50	40	50
S	9406230000	90%	300	270	300
S	9406240000	40%	400	160	400

In the above parts list example, only the equivalent of 470 GPs are available. The remaining 30 GPs are committed back to primary (30 GP / .7 = 43 GA).

Using the above example, if the primary unit of measure is GP, the potency associated with it in the Lot Master table (F4108) is only for conversion purposes. Potent units of measure are assumed to be 100% potent.

Also, a lot that consists of 100 potent units with a potency of 75% means that it is the equivalent of 133.3333... physical gallons (100/75). It is important for those companies that store in potent units to know the physical size of the inventory.

Caution: The system issues a warning message when it changes the standard value for grade or potency on the branch/plant record. Commitments can be brought out of balance if the primary unit of measure for an item is non-potent and commitments exist from a sales order or work order in a potent unit of measure. The reverse is true as well. You can correct this by running a repost for the sales order and work order. JD Edwards World recommends that you run sales order reports, and repost the purchase order, after you repost the work order.

Creating commitments for potent units consists of:

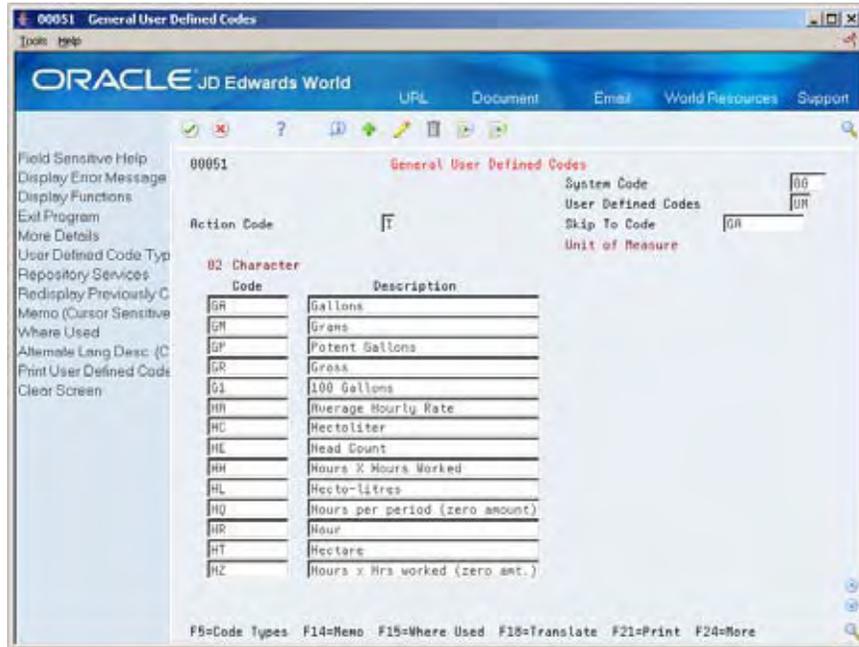
- Defining potent units
- Setting up a unit of measure conversion

To define potent units

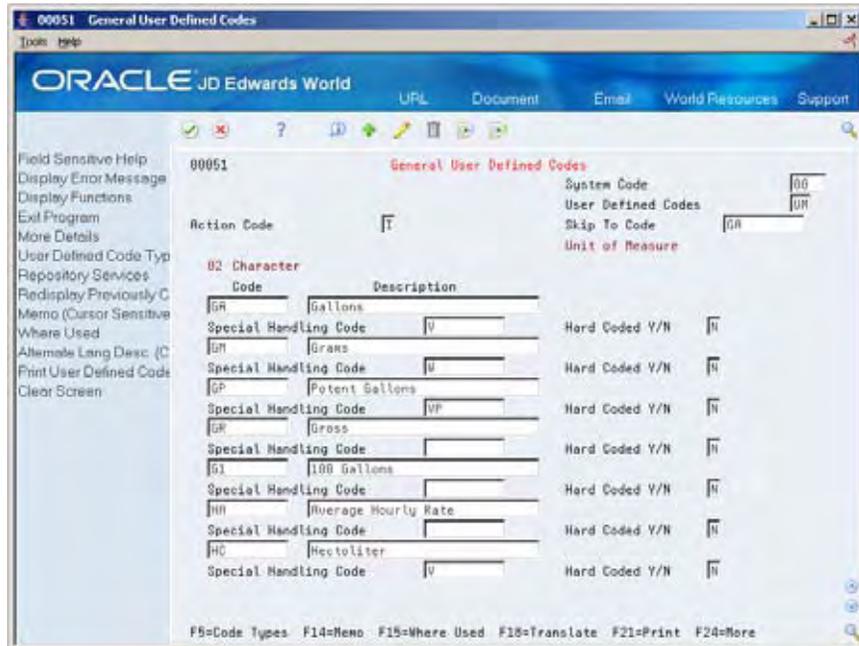


From General Systems (G00), choose General User Defined Codes

On General User Defined Codes



1. Access the detail area.



2. Complete the following field:

- Special Handling Code

Field	Explanation
Special Handling Code	<p>A code that indicates special processing requirements for certain user defined code values. The particular value you enter in this field is unique for each user defined code record type.</p> <p>The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify if the language is double-byte or if the language does not have uppercase characters. Programming is required to activate this field.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>If a "P" is in the second position, the system identifies that unit of measure as a potent unit of measure.</p>

To set up a unit of measure conversion



From Inventory Management (G41), choose **Inventory Master/Transactions**
From Inventory System Setup (G4141), choose **Standard Units of Measure**

You set up a unit of measure conversion for potent units so that the system can:

- Convert potent units of measure to physical units of measure
- Convert physical units of measure to potent units of measure

On Standard Units of Measure

Complete the following fields:

- Unit of Measure

- Quantity
- Unit of Measure

Processing Options

See [User Defined Codes \(P00051\)](#).

Reposting Work Order Commitments

	From Shop Floor Control (G31), enter 27 From Advanced Shop Floor Control (G3131), choose Repost Open Quantities
---	---

After you set up commitments, run the Repost Open Quantities batch program to:

- Clear outdated or invalid commitments
- Repost the commitments and on-order quantities specified in your work order to current requirements

Processing options allow you to limit the repost process to those work orders below a certain status.

Before You Begin

- Verify that the Item Branch table (F4102) is not in use.
- Indicate whether you want inventory hard or soft committed at each branch. See *Defining Commitment Rules*.

What You Should Know About

Inventory interfaces

The system does not repost bulk items and lines that do not have an inventory interface.

Reposting open and on-order quantities

When you repost open and on-order quantities on your work orders, the system:

- Clears (sets to zero) all values for the quantity and quantity committed in the Item Branch table (F4102).
- Reposts the quantity value in the Item Branch table for the parent item. The system uses the information from the Work Order Master table (F4801) and the following calculation: Quantity Ordered - (Quantity Completed + Quantity Scrapped)
- Reposts the quantity committed value for components in the Item Branch table for the location specified on the work order parts list for the item. The system uses the information from the Shop Floor Control Parts List table (F3111) and the following calculation: Quantity Required - Quantity Issued

Processing Options

See [Work Order Repost \(P3190\)](#).

Understand Grade and Potency Overview

About Grade and Potency

Manufacturers in the process industry need full control over the quality of products they make or buy. Examples are the food, chemical, and pharmaceutical industries. Grade and potency qualifications allow you to categorize your products more specifically and trace their movement through the manufacturing/distribution process.

In JD Edwards World systems, grade and potency are mutually exclusive. You can only use one or the other to categorize an item. All items that are grade or potency controlled must also be tracked by lot number. Grades and potencies divide items by their specific makeup or characteristics without changing item numbers. Lots identify a specific group of items with the same item number.

For grade and potency controlled items, you can enter a standard (preferred) value for each item. You can also enter a range of acceptable values that allow you to continue operations with grades or potencies that are outside the standard value, but still acceptable for your use. This helps to establish and maintain quality levels in your products, but is flexible enough to keep your operations running when the standard level of product is not available.

The grade or potency for each lot is used by programs that calculate on-hand and available quantities. All items that are grade or potency controlled must be lot controlled.

Grade identifies an item's particular specification makeup, and allows the system to separate one lot from other production lots without changing the item number. Examples are diamonds, lumber, and raw turquoise.

You can use grades to classify items by their characteristics, such as quality, strength, or integrity. If you activate grade control, certain functions edit for grades and will not perform transactions if the items involved do not meet the grade parameters.

Potency refers to the percentage of active ingredient within a solution, for example, 40% solution of hydrochloric acid, 3.2 beer versus standard percentages of alcohol, and coffee with varying strengths of caffeine.

Only items that meet the grade or potency range requirements stated in the bill of material are issued to the shop floor for production. Components outside the range will not show as available or on-hand in the Shop Floor Control material inquiries.

The system records grade or potency and lot transfer transactions in the item ledger and the general ledger, so that accounting is incorporated into the tracking.

You can order only a certain grade or potency of an item. Sales order and purchase order systems accommodate grade and potency standards and ranges.

This section contains the following:

- [Grade and Potency Control](#)
- [Lot Control Items](#)

Grade and Potency Control

You set up the following grade or potency control fields on the Manufacturing Data form:

- Grade/Potency Pricing - determines how to price grade or potency controlled items in Sales Order Management.
- Grade Control - identifies whether the item is grade controlled.
- Potency Control - identifies whether the item is potency controlled.
- Standard Grade - identifies the standard grade of the item, for example, premium or average. The value entered here provides the default for several forms in manufacturing.
- Standard Potency - identifies the standard percentage of active ingredients normally found in an item. The value entered here provides the default for several forms in manufacturing. The potency standard is used for the potent unit of measure conversion, in certain cases.
- From and Through Grade - defines the allowable grade ranges for an item.
- From and Through Potency - defines the allowable potency ranges for an item.

The system uses these values when you create a branch/plant record for the item.

Define grades you will use in the user defined code list 40/LG.

Define the user defined codes for the potent units of measure in the user defined code table 00/UM. For each potent unit of measure that you define, you must enter P in the second space of the Special Handling Code field, located in the detail area of the User Defined Code form.

Define a conversion for each potent unit of measure to a physical unit of measure in the Unit of Measure Conversions form. For example, 100 gallons of a solution at 80% potency = 80 potent gallons, 80 potent gallons of a solution at 80% = 100 gallons.

Lot Control Items

Use the Item Branch/Plant Information form to identify the item as a lot controlled item. Grade and potency controlled items must be lot controlled. Define one of the following values as the Lot Process Type:

- Blank = Lot assignment is optional. Numbers must be manually assigned. Quantity can be greater than one.
- 1 = Lot assignment is used. Numbers are assigned by the system using the system date in YYMMDD format. Quantity can be greater than one.
- 2 = Lot assignment is used. Numbers are assigned in ascending sequence using the next number convention. Quantity can be greater than one.

- 3 = Lot assignment is required. Numbers must be manually assigned. Quantity can be greater than one.

The screenshot shows the 'Item Branch/Plant Information' form in Oracle JD Edwards World. The form is titled '41026 Item Branch/Plant Information Branch'. The main data area contains the following fields:

Action Code	7	Branch/Plant	M99
Item Number	2434	Item Description	CRT Chassis Subassembly
Stacking Type	P	Line Type	
G/L Class	IN20	Sales Taxable	<input checked="" type="checkbox"/>
Item Price Group		Purchasing Taxable	<input checked="" type="checkbox"/>
Basket Reprice Group		Serial No. Required	<input checked="" type="checkbox"/>
Order Reprice Group		Lot Status Code	
Warranty Item Group		Lot Process Type	6
Backorders Allowed	<input checked="" type="checkbox"/>	Commitment Method	2
Check Availability Y/N	<input checked="" type="checkbox"/>	Mix Lots/Serial Number	<input type="checkbox"/>
Shelf Life Days	99999		
Margin Maintenance (%)			
Country of Origin		Country of Origin	United States
Planner Number	9100	Planner Name	Wilson, Bob
Buyer Number	0100	Buyer Name	Smith, John
Supplier			
Print Message			

At the bottom of the form, there are function keys: F5=Codes, F6=Cost, F9=Price, F10=Manufacturing, F15=Bulk Info, F24=Keys.

When you attach a parts list to a work order header, commitments are created for the components. How these commitments are created depends on the parameters of Commitment Method, Commitment Control, and Hard or Soft Commit. After you set up these parameters, commitments can be created in the same manner using both the Enter/Change Order or Order Processing programs.

When an item is defined as lot controlled, the system moves the grade or potency range to the parts list and allows only those lots within the range eligible for commitments. Any remaining quantities are committed to the primary location.

Understand Lot Processing Overview

About Lot Processing

Lot processing allows you to manage and maintain information about groups of items. For example, you can have the system assign lot numbers to groups of perishable items based on receipt dates to identify the items that you must sell first. You can view current information about each lot, such as the quantity of available items, and the transactions that have affected the lot.

Lot control is beneficial for identifying groups of items that are components of a final product. For example, if you assign lot numbers to both bicycle tires and bicycles assembled from the tires, you can:

- Identify the lot number for the tires that were used to build a specific bicycle
- Identify all bicycles that were assembled from a specific lot of tires

If you later find that a particular lot of tires is defective, you can immediately identify and recall all bicycles that were assembled from the defective tires.

A lot usually contains one type of item, but you can set up system constants to allow different types of items in the same lot. If a lot contains different items, the system maintains lot information for each lot number and item. You can also set up system constants to restrict a lot to one type of item and still allow that lot to exist in multiple warehouses.

In manufacturing, you can complete items to multiple lots in inventory from a single work order. When you report multiple lot completions, the system links materials issued to the work order to the completed items by lot number, by work order number, or by both. If you do not enter the lot number of the end item at the time of issue, the system only uses the work order number to link the component to the end item.

Process manufacturing industries generally operate in a lot-controlled environment, and many of the ingredients produced or consumed must be used before their expiration dates. Because ingredients cannot be used after their expiration dates, planning cannot use the unconsumed balance. Companies do not want to acquire unusable ingredients at any point in their operations.

Expiration planning considers the expiration dates of lots while calculating the quantity on-hand and consumes the lot quantities in the order of expiration dates. That is, lots with the most current expiration dates are consumed first. This is the first-in, first-out (FIFO) method. For example, when milk is delivered to a store, it is placed in the front of the shelf and continuously rotated so that the oldest product is sold to the customer first.

Expiration planning is important because whoever in the chain has the product when it expires, incurs the loss. Accurate planning, forecasting, and adherence to

schedules are important to expiration planning because products must make it through the entire chain from the supplier and finally to the customer before the expiration date. If any party in the chain does not adhere to the schedule, at least one party incurs a loss.

When you set the appropriate processing options, JD Edwards World manufacturing planning systems:

- Deduct expired quantities of items from the on-hand values
- Send a warning message that is recorded in the MPS/MRP/DRP Message table (F3411)
- Adjust the time series to reflect the expired product's effect

There are several methods you can use to assign lot number to items. You can:

- Have the system assign lot numbers
- Assign your own lot numbers
- Assign supplier lot numbers

Each time you create a lot, the system adds a record to the Lot Master table (F4108).

Creating Lots

You can create lots automatically when you:

- Create purchase order receipts
- Complete work orders
- Adjust inventory

You can create lots manually:

- On the Lot Master Revisions form
- During work order entry

The actual grade and potency of a lot is defined in the Lot Master table (F4108). You also use the Lot Master Revisions program to specify a reason code for a grade or potency change, and, through the processing options, protect a grade or potency from update.

Lot master information also includes the lot's status and expiration date. You can assign up to ten category codes to the lot for reporting purposes. The system stores all information about lots in the Lot Master table (F4108).

Lot Status

A lot's status determines whether it is available to be processed by the system. When a lot is on hold for any reason, the system does not process it unless a processing option to allow processing of held lots is available.

You set up lot status codes to identify reasons that a lot can be put on hold. After you set up the codes, you can assign them to items and lots through item master information, branch/plant information, purchase order receipts, and lot master revisions. You cannot process items out of lots on hold.

You can assign different status codes to a single lot based on the different locations in which the lot resides. Working with status codes involves:

- Setting up lot status codes
- Assigning status codes to different lot locations

You can run Lot Status Update to place expired lots on hold. If you run the program in proof mode, you can produce a report showing all lots that will be put on hold. If you run the program in final mode, you can produce a report showing all lots that have been put on hold. Set up lot status codes in the user defined code list 41/L.

You assign lot statuses when:

- You use the Lot Master Revisions form to enter a new lot. If you do not enter a status at this time, the system uses the lot status from the item's branch information in the Item Branch table (F4102).
- You set up a new location for an item using the Item Branch/Plant Information form.

You assign lot statuses using:

- The lot status code from that lot's record in the Lot Master table (F4108).
- The default status from the Item Branch table (F4102) if no lot status exists.

You can assign lot statuses to different lot locations using the Location Lot Status Change window from the Lot Master Revisions program. The system assigns statuses when you create a lot through transfer from another location. The system uses the status code of the From location. You can assign status codes to locations without using lots. Whether the system processes items out of locations on hold depends on how you set the processing options.

Use the following tables to determine a lot's status for newly created Lot Master records and Item Location records.

Table	Description
Lot Master (F4108)	<p>If you enter a lot status on the Lot Master Revisions form, the system uses that lot status.</p> <p>If you do not enter a lot status, the system uses the default lot status from the Item Branch table (F4102).</p>
Item Location (F41021)	<p>If you enter a lot status on the Lot Master Revisions form, the system uses that lot status.</p> <p>If you are moving a lot from another location:</p> <ul style="list-style-type: none"> ▪ The system uses the default lot status from the From location. ▪ If a lot number exists, the system uses the lot status from the Lot Master record. ▪ If no lot number exists, the system uses the default lot status from the Item Branch table (F4102).

See Also

- *Defining System Constants (P4009W)* in the *Inventory Management Guide* for information about allowing different types of items in the same lot

Enter Lot Information

Entering Lot Information

You can group items and monitor them through your inventory system by assigning them to lots. To work with lots, you must define:

- Lot information for items
- Information for lots

When you enter lot information for an item, you specify whether a lot number is mandatory, how the system assigns the number, and so forth. When you enter information for a lot, you specify the type of item that is contained in the lot, the expiration date for the lot, and so on.

This section contains the following:

- [Entering Lot Information for Items](#)
- [Entering Information for Lots](#)

Entering Lot Information for Items



From Inventory Management (G41), choose **Inventory Master/Transactions**
From Inventory Master/Transactions (G4111), choose **Item Master Information**

When you enter master information or branch/plant information for an item, you can specify:

- Whether the item requires a lot number at the time of receipt
- Whether the system commits the item's inventory based on lot numbers

You can also specify:

- The method by which lot numbers are assigned to the item
- The number of days that the item can remain in inventory before expiring

You can further specify lots by assigning serial numbers to items within the lots.

To enter lot information for items

On Item Master Information

Complete the following fields:

- Lot Status Code
- Lot Process Type
- Commitment Method
- Shelf Life Days
- Serial No. Required

Field	Explanation
Lot Status Code	Indicates the status of the lot, such as if the lot is approved and available for usage (blank lot status) or is held. The system stores the lot status at both the lot master level (F4108) and the item location level (F41021). This means that a lot can be available at the lot level (lot master), while a specific location where this lot is stored can be put on hold (item location). The system checks the lot status at the item location level for availability, not at the lot master level. The lot status in the Item Branch table (F4102) is for default purposes only. The system places the lot status in the lot master when you create a new lot without specifying the lot status. The system uses the lot status from the lot master in the item location when you create new item location records for the lot.

Form-specific information

The default value for the lots to which you assign this item.

Field	Explanation
Lot Process Type	<p data-bbox="764 262 1421 352">A code that indicates whether lot or serial number is assigned. Lot and serial number processes use the Lot Master table (F4108).</p> <p data-bbox="764 367 943 394">Valid codes are:</p> <ul style="list-style-type: none"> <li data-bbox="764 409 1421 472">0 Lot assignment is optional. You can manually assign numbers. Quantity can be greater than one (default). <li data-bbox="764 483 1421 573">1 Lot assignment is required. The system assigns numbers using the system date in YYMMDD format. Quantity can be greater than one. <li data-bbox="764 583 1421 674">2 Lot assignment is required. The system assigns numbers in ascending order using Next Numbers. Quantity can be greater than one. <li data-bbox="764 684 1421 747">3 Lot assignment is required. You must manually assign numbers. Quantity can be greater than one. <li data-bbox="764 758 1421 848">4 Serial number assignment is optional except during shipment confirmation. Quantity must not exceed one. <li data-bbox="764 858 1421 949">5 Serial number assignment is required. The system assigns numbers using the system date in YYMMDD format. Quantity must not exceed one. <li data-bbox="764 959 1421 1050">6 Serial number assignment is required. The system assigns numbers in ascending order using Next Numbers. Quantity must not exceed one. <li data-bbox="764 1060 1421 1150">7 Serial number assignment is required. You must manually assign numbers. Quantity must not exceed one. <p data-bbox="971 1165 1219 1192" style="text-align: center;"><i>Form-specific information</i></p> <p data-bbox="764 1207 1421 1331">Use codes 4 through 7 for advanced serial number processing. In Purchase Management, you add serial numbers using the Lot field on Purchase Order Detail. Each item must have a unique serial number.</p> <p data-bbox="764 1341 1421 1501">For items requiring serial numbers as well as lot assignments, use the Lot Process Type field in conjunction with the Serial No Required field. Codes 3 through 5 for the Serial No Required field indicate the setup requirements necessary for these items.</p>

Field	Explanation
Commitment Method	<p>A code that indicates the method that the system uses to commit lot items from inventory. Valid codes are:</p> <ol style="list-style-type: none">1 The normal commitment method for inventory (default). The system commits inventory from the primary location and then from secondary locations. The system commits inventory from the locations with the most inventory before committing inventory from locations with the least. The system commits backorders to the primary location.2 The inventory commitment method by lot number. The system commits inventory by lot number, starting with the lowest lot number and committing orders to available lots.3 The inventory commitment method by lot expiration date. The system commits inventory from the locations with the earliest expiration date first. The system considers only locations with expiration dates greater than or equal to the sales order or parts list requested date.
Shelf Life Days	<p>The number of days that an item can remain in inventory before it expires. The system adds this number to the date that the item is received to determine the expiration date for the item. If you do not enter a value here, you must enter an expiration date each time you receive the lot item.</p>

Field	Explanation
Serial No. Required	<p>A code that indicates whether you must attach a serial number to this item at the time of receipt or sale for basic serial number processing, or if memo lot information is required for advanced serial number processing.</p> <p>You can use basic serial number processing for informational purposes only. For example, you can add a serial number for an item, and review the number later.</p> <p>For basic serial number processing, valid values are:</p> <p>Y Yes, the system requires a serial number for all transactions pertaining to this item in related inventory, sales, and purchase order programs</p> <p>N No, the system does not require a serial number</p> <p>The system does not use this information if you use advanced serial number processing. Advanced serial number processing allows you to track an item through purchasing and sales based on a serial number. To specify serial number requirements, you must use the Lot Process Type field on Item Master Information.</p> <p>Values 3 through 5 indicate whether lot assignment is required for items with serial numbers. You can require assignment of up to three lot numbers, including Supplier Lot, Memo Lot 1, and Memo Lot 2. To specify lots for items with serial numbers, you must use the following values:</p> <p>3 Supplier lot number required (purchasing only)</p> <p>4 Supplier lot number required (purchasing only), and Memo Lot 1 required</p> <p>5 Supplier lot number required (purchasing only), Memo Lot 1 required, and Memo Lot 2 required</p>

Entering Information for Lots

After you assign a new lot number to an item, the system creates a lot. You can enter information for the new lot on Lot Master Revisions.

You might create a lot for items that you expect to receive in the future. You can create a lot manually by entering the lot number and specifying lot information on Lot Master Revisions.

Lot information can include the expiration date, grade and potency values, supplier information, and so forth. You can also assign up to ten category codes to each lot for reporting purposes.

The system maintains separate lot information for each type of item in a lot. For example, if Lot 1 contains Item A and Item B, you can enter separate lot information for each item. A lot can contain multiple items only if you set up system constants to allow more than one type of item in a lot.

Also, you can set up system constants to process a lot that contains only one item, yet those quantities are located in multiple warehouses. For example, Lot 234 consists of one item, bicycle tires. In addition, Warehouse A represents the bulk warehouse, where the majority of the tires are stored. However, Warehouses B and C receive partial quantities of the same item so that Warehouse A has adequate space. When you receive the tires at Warehouses B and C, you can assign them to Lot 234 and track them through the unique lot number.

Complete the following tasks:

- Create a lot
- Enter lot control information
- Enter availability information
- Enter supplier information

What You Should Know About

Assigning new lot numbers to items You can assign new lot numbers to items when you receive purchase order receipts, adjust inventory, and complete work orders. You can also assign new lot numbers for items on Item/Location Information.

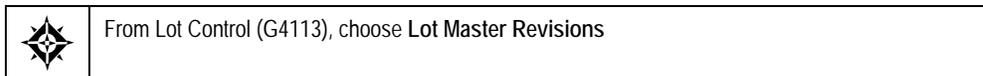
Assigning grades or potencies to lots If you do not specify a grade or potency for items that require this information, the system uses the standard grade or potency from Item Master Information or Item Branch Information.

Item/Lot Ledger You can track changes to lot status, grade, and potency on the Item/Lot Ledger form.

See Also

- *Working with Item Locations (P41024)* in the *Inventory Management Guide* for information about adding new lots to item locations
- *Entering Item Grade and Potency Information (P41013)* in the *Inventory Management Guide* for information about item grades and potencies
- *Locating On-Hand Quantity Information (P4111)* in the *Inventory Management Guide* for information about viewing the Item/Lot Ledger
- *Defining System Constants (P4009W)* in the *Inventory Management Guide* for information about allowing duplicate lots

To create a lot



On Lot Master Revisions

Complete the following fields:

- Branch/Plant
- Lot/SN
- Item Number
- Lot Expiration

Lot Dates and Quantities appears, where you can enter availability information.

Field	Explanation
Lot/Serial Number	<p>A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>If a lot number has leading zeros, you must type them as part of the lot number.</p>
Date - Layer Expiration	<p>The date that this lot of inventory will expire. In the Sales Order Management, Manufacturing, and Warehouse Management systems, this date is used in conjunction with the inventory commitment method (see data item CMGL). The system will commit the inventory using the oldest lot first, based on the requested date of the sales or work order. During the commitment process, inventory in the lot is considered good through the expiration date.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>Although you can change this date, the system automatically updates this field based on how you set up the user defined code (system 40, table LD).</p>

To enter lot control information

	From Lot Control (G4113), choose Lot Master Revisions
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On Lot Master Revisions

Complete the following fields:

- Lot Description
- Lot Status Code
- Lot Potency
- Lot Grade
- Status Change Reason
- Potency Change Reason
- Grade Change Reason

Field	Explanation
Lot Description	You can use this field to further describe a specific lot of inventory within a stocking location.
Lot Status Code	<p>Indicates the status of the lot, such as if the lot is approved and available for usage (blank lot status) or is held. The system stores the lot status at both the lot master level (F4108) and the item location level (F41021). This means that a lot can be available at the lot level (lot master), while a specific location where this lot is stored can be put on hold (item location). The system checks the lot status at the item location level for availability, not at the lot master level. The lot status in the Item Branch table (F4102) is for default purposes only. The system places the lot status in the lot master when you create a new lot without specifying the lot status. The system uses the lot status from the lot master in the item location when you create new item location records for the lot.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>The default for this field comes from the lot status code (including a blank value) that you assign to the item on Item Master Information or Item Branch/Plant Information.</p> <p>This code serves as the lot status default when you create a new item location for the lot.</p>
Lot Potency	A code that indicates the potency of the lot, which is expressed as a percentage of active or useful material (for example, the percentage of alcohol in a solution). The actual potency of a lot is defined in the Lot Master table (F4108).

Field	Explanation
Lot Grade	This field contains the grade of a lot expressed as an alphanumeric code. The grade is used to indicate the quality of the lot. For example: A1 Premium grade A2 Secondary grade The grade for a lot is stored in Lot Master table (F4108).
Status Change Reason	A code (system 42, type RC) that indicates the reason for a change in the status of a lot, such as goods that are damaged in shipment or goods that are placed in quarantine.
Potency Change Reason	A code (system 42, type RC) that indicates the reason for a potency change to a lot. For example, you might change the lot potency because the actual potency of the items was lower than expected or because the potency was affected by evaporation.
Grade Change Reason	A code (system 42, type RC) that indicates the reason for a grade change to a lot. For example, you might change the grade because either the actual grade was lower than expected or the lot was downgraded because of aging.

To enter supplier information

	From Lot Control (G4113), choose Lot Master Revisions
---	---

On Lot Master Revisions

Complete the following fields:

- Supplier
- Supplier Lot
- Order Number

Field	Explanation
Primary / Last Supplier Number	The address book number of the preferred provider of this item. You can enter the number for the supplier or you can have the system enter it each time that you receive the item from a supplier. You specify whether the system enters the supplier using processing options for Enter Receipts.
Supplier Lot Number	The supplier's lot number for the item.

Field	Explanation
Document (Order No, Invoice, etc.)	A number identifying the original document. This can be an invoice number, work order number, sales order number, journal entry number, and so on. <i>Form-specific information</i> The purchase order number for the lot item. The system enters the purchase order number when you enter a receipt for the item in Purchase Order Management.

Processing Options

See [Lot Master Revisions \(P4108\)](#).

Work with Lot Availability

Working with Lot Availability

You can view the availability of items in a lot, as well as the activity dates, item quantities, and hold statuses that pertain to the lot. Activity dates and item quantities reflect receipts, issues, sales, and so forth for items in a lot.

This section contains the following:

- [Viewing Lot Availability](#)
- [Working with Lot Quantities](#)
- [Working with Lot Activity Dates](#)
- [Working with Lot Statuses](#)

Viewing Lot Availability



From Inventory Management (G41), choose **Lot Control**
From Lot Control (G4113), choose **Lot Availability**

You can view availability for:

- All items in a lot
- All lots that contain the item you specify

You can choose to display only those items or lots for which there are on-hand balances.

To view lot availability

On Lot Availability

Lot Number	Status	Reason Expires	Hand / Held	Available
0	Approved	4893	4643	4643
1246	Approved		1246	1246
10432	Approved		10432	10432
10432	Approved		10432	10432
10432	Approved		10432	10432
10432	Approved		10432	10432
10432	Approved		10432	10432
10432	Approved		10432	10432
10432	Approved		10432	10432
10432	Approved		10432	10432
10432	Approved		10432	10432

1. Complete the following fields for the item or lot that to view:
 - Branch/Plant
 - History (Y/N)
 - Grade (from)
 - Grade (thru)
 - Potency (From)
 - Potency (Thru)
 - Lot/SN
 - Item Number
2. Review the following fields:
 - Status (Lot Status Code)
 - Reason (Status Change Reason)
 - Expires (Expiration Date)
 - Quantity on Hand/Held
 - Available
3. Enter 3 (Lot Master) in the Option field to access the Lot Information form.
4. Review the following fields:
 - Lot Description

- Lot Expiration Date
- Lot Status Code
- Lot Potency
- Lot Grade

Field	Explanation
History (Y/N)	<p>A code that determines whether to display information for all locations and lots or only for those with on-hand balances. Valid codes are:</p> <p>N Display only locations and lots with on-hand balances</p> <p>Y Display all locations and lots</p>
Grade	<p>A code (system 40, type LG) that indicates the minimum grade that is acceptable for an item.</p> <p>The system displays a warning message if you try to purchase or issue items with grades that do not meet the minimum grade acceptable. The system does not allow you to sell items with grades that do not meet the minimum acceptable level.</p>
Thru Grade	<p>A code (system 40, type LG) that indicates the maximum grade that is acceptable for an item.</p> <p>The system displays a warning message if you try to purchase or issue items with grades that exceed the maximum grade acceptable. The system does not allow you to sell items with grades that exceed the maximum grade acceptable.</p>
Potency	<p>A number that indicates the minimum potency, or percentage of active ingredients, acceptable for an item.</p> <p>The system displays a warning message if you try to purchase or issue items that do not meet the minimum acceptable potency. The system does not allow you to sell items that do not meet the minimum acceptable potency.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>This is the minimum potency acceptable for items in this lot.</p>
Thru Potency	<p>A number that indicates the maximum potency, or percentage of active ingredients, that is acceptable for an item.</p> <p>The system displays a warning message if you try to purchase or issue items that have a potency that exceeds the maximum potency acceptable. The system does not allow you to sell items that have a potency that exceeds the maximum potency acceptable.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>This is the maximum potency acceptable for items in this lot.</p>

Field	Explanation
Hand / Held	The number of units that are physically in stock. The quantity on-hand displays in the primary unit of measure. <i>Form-specific information</i> The number of items in stock or on hold. If the item is on hold, the system highlights the field.
Available	The quantity available can be the on-hand balance minus commitments, reservations, and backorders. Availability is user defined and can be set up in branch/plant constants.

What You Should Know About

Viewing the same item or lot multiple times	If the same item or lot appears more than once, each item or lot exists in a different location.
--	--

See Also

- *Locating Detailed Quantity Information (P41023)* in the *Inventory Management Guide* for information on how the system calculates item availability
- *Locating Summary Quantity Information (P41202)* in the *Inventory Management Guide* for information on viewing detailed item availability by location and lot

Processing Options

See [Lot Availability \(P41280\)](#).

Working with Lot Quantities

You can view the on-hand quantity, the available quantity, and the quantity held for each lot. You can also view up to six other quantity types, which you set up on user defined code table 40/LQ. These quantity types might reflect the quantity of items:

- Received
- Issued
- Adjusted
- Completed
- Approved
- Sold

You set up user defined code table 40/LQ to indicate for which document types the system tracks lot quantities. You must associate each document type with one of the quantity type categories that appear on Lot Master Revisions.

For example, you specify the Received category for the document type OP (purchase orders). Then, each time you receive items on a purchase order, the system records the quantity to the Received category for the lot.

Complete the following tasks:

- Reviewing lot quantities
- Setting up the system to track lot quantities

To review lot quantities



From Inventory Management (G41), choose **Lot Control**
From Lot Control (G4113), choose **Lot Master Revisions**

On Lot Master Revisions

The screenshot displays the 'Lot Master Revisions' window in Oracle JD Edwards World. The window title is '4100 Lot Master Revisions Branch'. The interface includes a menu bar with 'Tools' and 'Help', and a toolbar with various icons. The main area is divided into several sections:

- Field Sensitive Help:** A list of help topics on the left side.
- Lot Information:** Fields for Action Code, Lot/SN (0501120002), Item Number (1261), Lot Description (Multivitamin Tablets), Lot Expiration (01/12/16), % Life Remaining (.00), Days Until Expire (0), Lot Status Code (Approved), Lot Potency, Lot Grade (Not Graded), Supplier, Supplier Lot, and Order Number (110251).
- Quantities:** A section on the right showing 'Quantity on Hand' and 'Available'.
- Dates:** A section at the bottom showing 'Received/Created' (11/20/13), 'Issued', 'Recalibrated', 'Completed' (01/12/15), 'Approved', and 'Sold' (12/05/13).

1. To view quantities for a particular lot, complete the following fields:
 - Branch/Plant
 - Lot/SN
 - Item Number
2. Review the following fields:
 - Quantity on Hand
 - Available
 - Quantity Held
 - Quantities Received
 - Quantities Issued

- Quantities Adjusted
- Quantities Completed
- Quantities Approved
- Quantities Sold

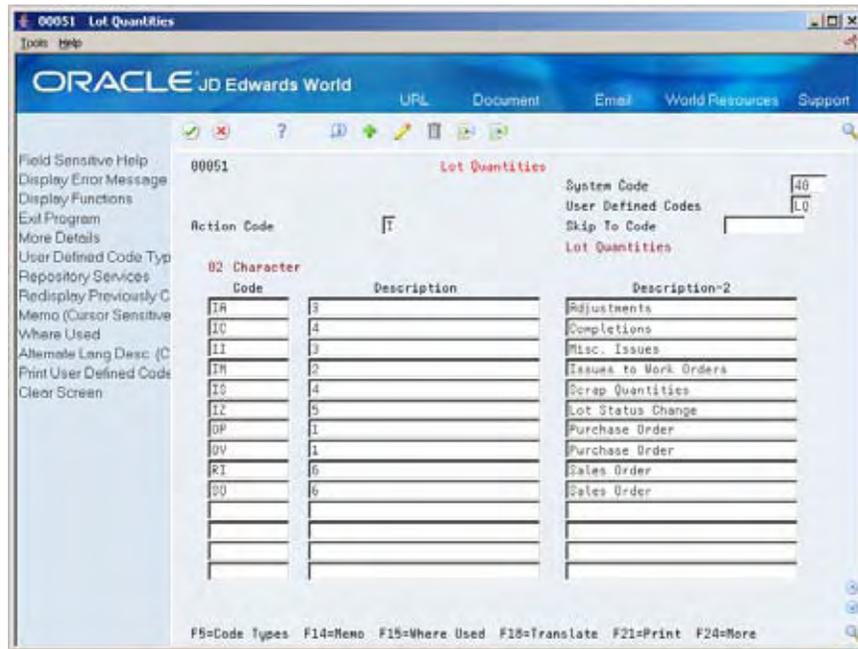
Note: The Quantities fields described below all represent different quantity categories. The specific document types that update each category are defined in the UDC table (40/LQ). These user defined quantities are updated when data is written to the Cardex file (F4111).

Field	Explanation
Received	This field represents quantity category 1. <i>Form-specific information</i> The quantity of items received in this lot.
Issued	This field represents quantity category 2. <i>Form-specific information</i> The quantity of items issued from this lot.
Adjusted	This field represents quantity category 3. <i>Form-specific information</i> The quantity of items adjusted to this lot.
Completed	This field represents quantity category 4. <i>Form-specific information</i> The quantity of items completed and assigned to this lot.
Approved	This field represents quantity category 5. <i>Form-specific information</i> The quantity of items approved in this lot.
Sold	This field represents quantity category 6. <i>Form-specific information</i> The quantity of items sold from this lot.

To set up the system to track lot quantities

	From Inventory Management (G41), choose Lot Control From Lot Control (G4113), choose Lot Quantities
---	--

On Lot Quantities



1. Complete the following fields for each document type:
 - 02 Character Code
 - Description
2. Assign one of the following categories to each document type by entering the number in parentheses in the Description field:
 - Received (1)
 - Issued (2)
 - Adjusted (3)
 - Completed (4)
 - Approved (5)
 - Sold (6)

Note: If you do not specify a grade or potency for items that require this information, the system uses the standard grade or potency from Item Master Information or Item Branch Information.

Working with Lot Activity Dates

You can view up to six activity dates for a lot. You determine the activity dates that display by setting up user defined code list 40/LD. These activity dates might reflect the last time that an item was:

- Received or Created

- Issued
- Recalibrated
- Completed
- Approved
- Sold

You set up user defined code table 40/LQ to indicate for which document types the system tracks lot activity dates. You must associate each document type with one of the date categories above.

For example, you specify the Sold category for the document type SO (sales orders). Then, each time you confirm shipments for a sales order, the system records the date to the Sold category for the lot.

You can also enter lot activity dates manually instead of having the system track them for you.

Complete the following tasks:

- Change activity dates for a single lot
- Change activity dates for multiple lots
- Set up the system to track lot dates

To change activity dates for a single lot

	From Inventory Management (G41), choose Lot Control From Lot Control (G4113), choose Lot Master Revisions
---	--

On Lot Master Revisions

4100 Lot Master Revisions Branch

Oracle JD Edwards World

4100 Lot Master Revisions Branch/Plant R30

Action Code [C]
 Lot/SN 660120002
 Item Number 1261 Multivitamin Tablets

Lot Description [] Memo Lot 1 []
 Lot Expiration 01/12/16 Memo Lot 2 []
 % Life Remaining .00 Days Until Expire: 0 Memo Lot 3 []
 Lot Status Code Approved Status Change Reason []
 Lot Potency Not Graded Potency Change Reason []
 Supplier [] Grade Change Reason []
 Supplier Lot []

Order Number 110251 | 00

-----Quantities-----
 Quantity on Hand []
 Available []
 Quantity Held []
 Received []
 Issued []
 Adjusted []
 Completed 10,000
 Approved []
 Sold 10,000

-----Dates-----
 Received/Created 11/20/13
 Issued []
 Recalibrated []
 Completed 01/12/15
 Approved []
 Sold 12/05/13

F10=Category Codes F11=Lot Dates F15=Loc. Lot Status Window F24=More

1. To view dates for a specific lot, complete the following fields:
 - Branch/Plant
 - Lot/SN
 - Item Number
2. Change the following dates for the appropriate lots, if necessary:
 - Date Received/Created
 - Date Issued
 - Date Recalibrated
 - Date Completed
 - Date Approved
 - Date Sold

Note: The dates described below all represent different date categories. The specific document types that update each category are defined in the UDC table (40/LD). Although you can change this date, the system automatically updates this field based on the setup in the UDC table.

Field	Explanation
Received/Created	<p>This field represents date category 1.</p> <p>The last date that a particular activity occurred. You determine the type of activity that the category represents (for example, receipts).</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>The last date that items were created or received in the lot.</p>
Issued	<p>This field represents date category 2.</p> <p>The last date that a particular activity occurred. You determine the type of activity that the category represents (for example, issues to work orders).</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>The last date that items from the lot were issued to work orders.</p>
Recalibrated	<p>This field represents date category 3.</p> <p>The last date that a particular activity occurred. You determine the type of activity that the category represents (for example, recalibration dates).</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>The last date that inventory adjustments were made to this lot.</p>

Field	Explanation
Completed	<p>This field represents date category 4.</p> <p>The last date that a particular activity occurred. You determine the type of activity that the category represents (for example, inventory completions).</p> <p><i>Form-specific information</i></p> <p>The last date that inventory completions were made to this lot.</p>
Approved	<p>This field represents date category 5.</p> <p>The last date that a particular activity occurred. You determine the type of activity that the category represents (for example, lot status approvals).</p> <p><i>Form-specific information</i></p> <p>The date that the lot was approved.</p>
Sold	<p>This field represents date category 6.</p> <p>The last date that a particular activity occurred. You determine the type of activity that the category represents (for example, sales).</p> <p><i>Form-specific information</i></p> <p>The last date that items were sold from this lot.</p>

To change activity dates for multiple lots

	<p>From Inventory Management (G41), choose Lot Control</p> <p>From Lot Control (G4113), choose Speed Lot Update</p>
---	---

On Speed Lot Update

Lot/SN	Date Received	Date Issued	Date Tested	Date Complete	Quantity On Hand	Quantity Available
9601120003	11/28/13			01/12/15	5000	5000
9603010009	11/29/13			03/02/15	5000	5000
9603080009	11/29/13			03/09/15	5000	5000
9603150010	11/29/13			03/16/15	5000	5000
9603220009	11/29/13			03/23/15	5000	5000
9603290009	11/29/13			03/30/15	5000	5000
9605030008	11/29/13			05/04/15	5000	5000
9605100000	11/29/13			05/11/15	5000	5000
9605170000	11/29/13			05/18/15	5000	5000
9605240002	11/29/13			05/25/15	3000	3000
9701260000	12/15/13			01/26/16	11000	11000
9702030000	12/15/13			02/03/16	5000	5000
9702030001	12/15/13			02/03/16	5000	5000
9704090000	12/15/13			04/08/16	10000	10000
9704180000	12/15/13			04/09/16	10000	10000

Opt: 1=Lot Master 2=Trace/Track 3=Location Lot Status Window F24=More Keys

1. Complete the following fields:
 - Branch/Plant
 - History (Y/N)
 - Item Number
 - Supplier Lot
2. Change the following dates for the appropriate lots, if necessary:
 - Date Received
 - Date Issued
 - Date Tested (or recalibrated)
 - Date Complete

To set up the system to track lot dates



From Inventory Management (G41), choose Lot Control
 From Lot Control (G4113), choose Lot Dates

On Lot Dates

Code	Description	Description-2
	Default - Lot Dates 48/LD	
IA	3	Adjustments
IC	4	Completions
II	3	Misc. Issues
IH	2	Issues to Work Orders
IS	4	Scrap Quantities
IZ	5	Lot Status Change
IP	1	Purchase Orders
IV	1	Purchase Orders
RI	6	Sales Orders
RO	6	Sales Orders

F5=Code Types F14=Memo F15=Where Used F18=Translate F21=Print F24=More

- Complete the following fields for each document type:
 - 02 Character Code
 - Description-2
- Assign one of the following categories to each document type by entering the number for the date category in the Description field:
 - Date Received/Created (1)
 - Date Issued (2)
 - Date Recalibrated (3)
 - Date Completed (4)
 - Date Approved (5)
 - Date Sold (6)

Working with Lot Statuses

You set up lot status codes to identify the reasons that a lot is on hold. After you set up the codes, you can assign them to items and lots on Item Master Information, Branch/Plant Information, Lot Master Revisions, Enter Receipts, and so forth. You cannot process items from lots on hold.

You can assign different status codes to a single lot based on the different locations in which the lot resides. Complete the following tasks:

- Set up lot status codes
- Assign status codes to different lots

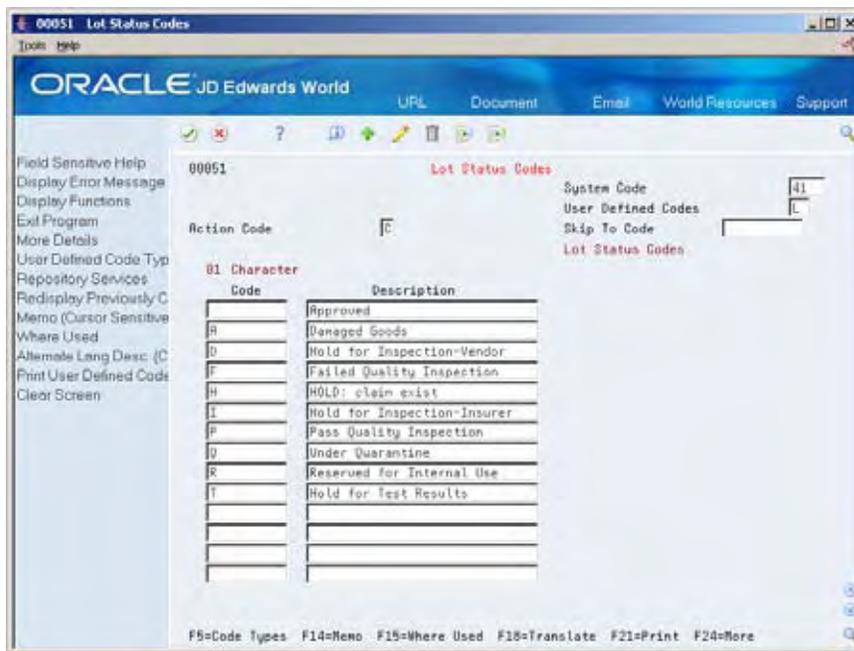
You can run the Lot Status Update DREAM Writer program to place expired lots on hold. You can preview a list of all lots that will be placed on hold by running the program in proof mode.

41082	JD Edwards World Hold Expired Lots	Page No. 3 Date 9/10/18		
		Branch/Plant 30 Lot Expiration Date. 08/30/18 Mode - Processing. . Proof Lot Status Code. . . Q		
Item Number	Description	Location	Lot Number	Date Expires
V001	Natureway High Energy Vitamins	. .	00000004	05/16/18
V001	Natureway High Energy Vitamins	. .	00000005	08/26/18
12829	Parselenium		9309150009	08/14/18
V001	Natureway High Energy Vitamins	. .	9310140000	08/15/18
V001	Natureway High Energy Vitamins	. .	9310140001	08/16/18
V001	Natureway High Energy Vitamins	. .	9310140002	08/26/18
V001	Natureway High Energy Vitamins	. .	9310140003	08/26/18
I0006-I	Spray Dry Powder 1200 Grams		9503120000	02/19/18
12845	Buffer, inert		9601050000	01/04/18
12845	Buffer, inert		9601110000	01/10/18

To set up lot status codes

	From Inventory Management (G41), choose Lot Control From Lot Control (G4113), choose Lot Status Codes
---	--

On Lot Status Codes



Complete the following fields for each status code:

- 01 Character Code
- Description

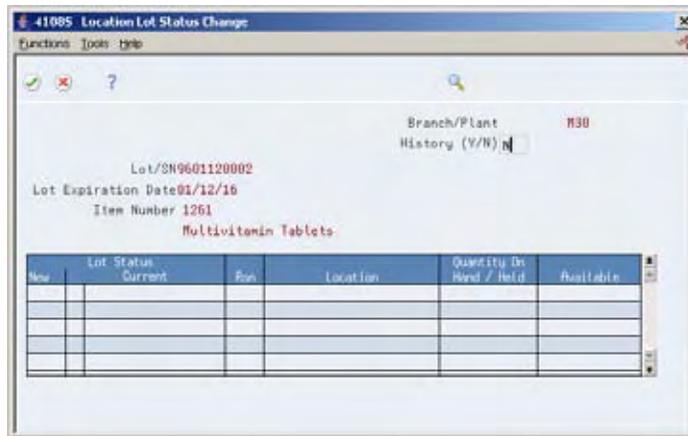
To assign status codes to different lots

	From Inventory Management (G41), choose Lot Control From Lot Control (G4113), choose Lot Master Revisions
---	--

On Lot Master Revisions

1. Locate the appropriate lot and item.

Location Lot Status Change appears.



2. On Location Lot Status Change, complete the following fields for each location for which you want to change the status code:

- New (New Lot Status)
- Reason (Reason for Changing Lot Status)

What You Should Know About

Assigning status codes to locations

You can assign status codes to locations as well as lots. The system verifies that a lot is on hold before verifying that the location is on hold.

The system might process items out of locations on hold depending on the program in which you are working and the way that processing options are set.

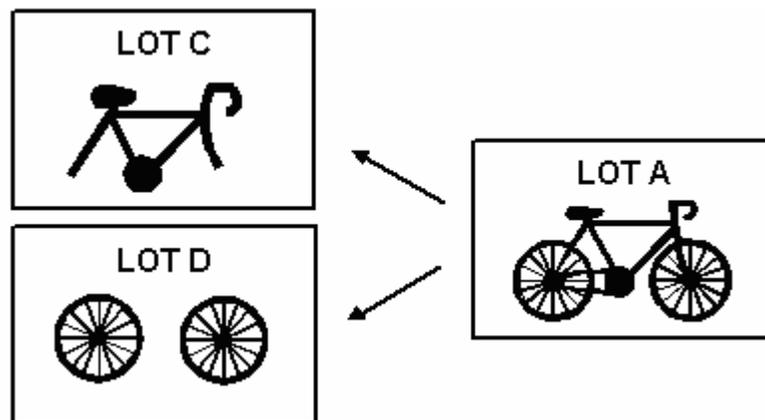
View Lot Transactions

Viewing Lot Transactions

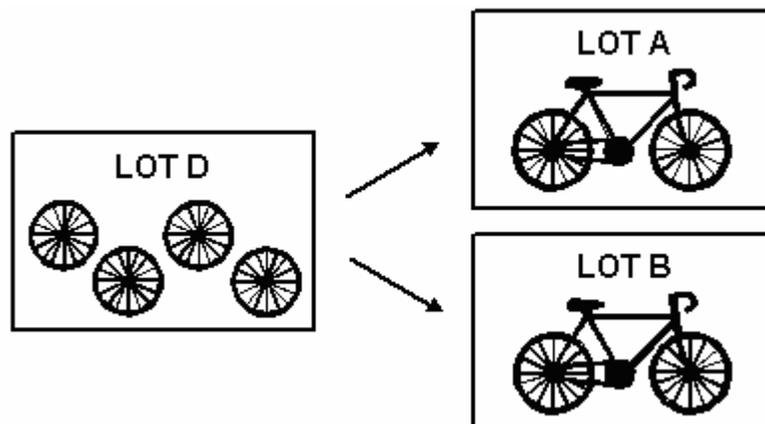
You might want to view the transactions that have affected a lot, such as:

- The receipts, inventory issues, and so on, that were generated as a result of assigning items to the lot
- The inventory issues, work order completions, sales, and so on, that were generated as a result of removing items from the lot

Use Lot Tracing to view the transactions in which items were assigned to the lot. If the lot contains kit or assembled items, you can identify the parts that were used to assemble items in the lot and the lots from which the parts came.



You use lot tracking to view the transactions in which items were removed from the lot. You can identify items that have been assembled using parts from the lot, and the lots to which the assembled items were assigned.



You provide information about how you want the system to trace and track lots. For example, you specify the document types that the system monitors to trace and track lots. You also specify whether you want to view transactions for assembled items or non-assembled items by specifying a trace/track mode.

The system traces and tracks a lot by linking corresponding transactions, such as a receipt, an issue, a completion, and a sales order. If the link is incomplete, the system stops tracing and tracking. For example, if you do not include the completion document type in inclusion rules, the system stops tracking at the completion transaction.

This section contains the following:

- [Printing Trace and Track Reports](#)
- [Reviewing Trace and Track Information](#)
- [Setting up Trace and Track Inclusion Rules](#)

Printing Trace and Track Reports

	From Inventory Management (G41), choose Lot Control From Lot Control (G4113), choose Trace/Track Print
---	---

You can print a report that provides trace and track information, such as the level by which the system traces or tracks lots.

41505	JD Edwards World Lot Tracing Report	Page -	2	Date -	8/08/18				
Parent Lot Lot Number	Item Number	Branch	Level	Trans Qty	Date	Trans Description	Order No	Ty	Customer/Vendor
13363	TELEPHONE	10	Lot Grade			Lot Potency			
51013827	TELEPHONE UNIT	10	1	10-	03/08/18	Inventory Issue	13363	IM	
			Lot Grade			Lot Potency			
51013827	TELEPHONE UNIT	10	.2	100	03/08/18	Inventory Receipt	34	OV	Edwards, J.D. & Co
			Lot Grade			Lot Potency			
51013828	TELEPHONE CORD	10	1	10-	03/08/18	Inventory Issue	13363	IM	
			Lot Grade			Lot Potency			
51013828	TELEPHONE CORD	10	.2	100	03/08/18	Inventory Receipt	34	OV	Edwards, J.D. & Co
			Lot Grade			Lot Potency			
51013829	TELEPHONE RECEIVER	10	1	10-	03/08/18	Inventory Issue	13363	IM	
			Lot Grade			Lot Potency			
51013829	TELEPHONE RECEIVER	10	.2	100	03/08/18	Inventory Receipt	34	OV	Edwards, J.D. & Co
			Lot Grade			Lot Potency			

41505	JD Edwards World Lot Tracking Report	Page -	2	Date -	8/08/18				
Lot Number Parent Lot	Item Number	Branch	Level	Trans Qty	Date	Trans Description	Order No	Ty	Customer/Vendor
13363	TELEPHONE	10	Lot Grade			Lot Potency			
13363	TELEPHONE	10	1	10	03/08/18	Inventory Complet	13363	IC	
			Lot Grade			Lot Potency			

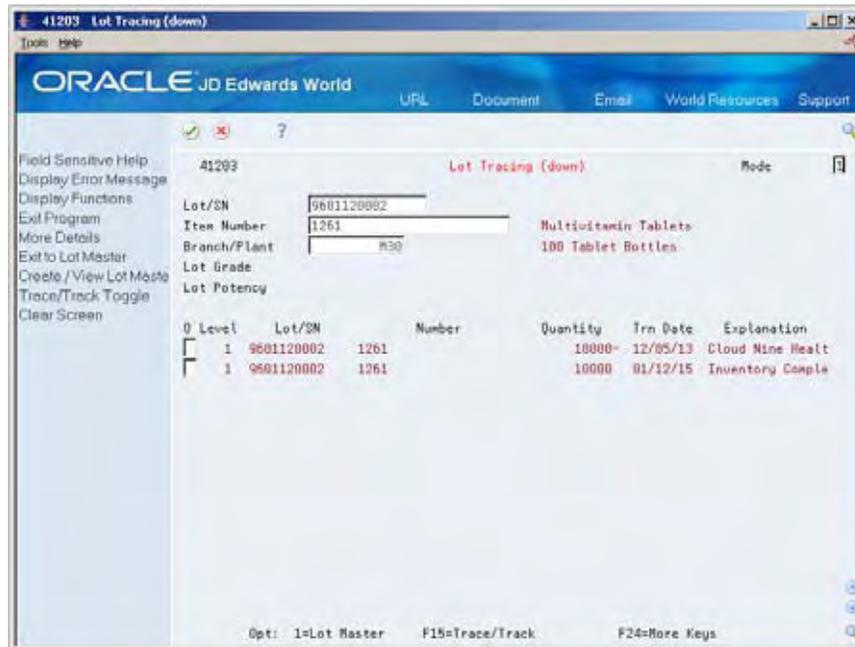
Reviewing Trace and Track Information

	From Inventory Management (G41), choose Lot Control From Lot Control (G4113), choose Trace/Track Inquiry
---	---

You can review trace and track information online. You determine whether the report displays tracing or tracking information by using processing options for the Trace/Track Inquiry program.

To review trace and track lot items

On Lot Tracing or Lot Tracking



1. Complete the following fields for the lot that you want to trace or track:

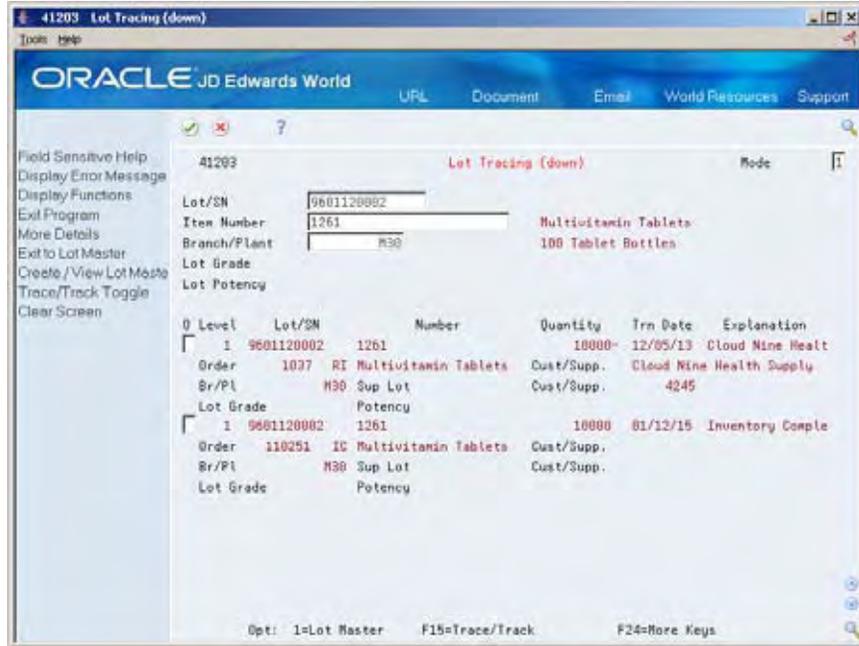
- Mode
- Lot/SN

Note: Depending on how you have set the Allow Duplicate Lots field in system constants, you might have to enter an item number and branch/plant.

2. Review the following fields, as necessary:

- Level
- Serial Number
- Item Number
- Quantity
- Transaction Date
- Explanation (Transaction Explanation)

3. Access the detail area.



4. Review the following fields, as necessary:

- Order
- Branch/Plant
- Lot Grade
- Lot Potency
- Sup Lot (Supplier Lot)
- Customer/Supplier

Field	Explanation
Mode	A code that indicates how you want the system to display lot trace and track information. Valid codes are: 1 Single level trace/track 2 No intermediate levels (displays only top or bottom levels) 3 Multi-level trace/track 4 Multi-level indented trace/track
Level of Indentation	A number indicating the level of a child in the relationship to its parent in a hierarchy.
Date - Order/Transaction	The date that an order was entered into the system. This date determines which effective level that the system uses for inventory pricing.
Explanation - Transaction	This text identifies the reason that a transaction occurred.

What You Should Know About

Reviewing detailed lot information

Access the Lot Information window by pressing F1 in the Lot/SN field on Lot Tracing or Lot Tracking. This window displays the item that belongs to the lot, the branch/ plant to which the lot is assigned, the lot expiration date, the lot status, and so on.

See *Viewing Lot Availability* for more information.

Processing Options

See [Lot Tracing and Tracking \(P41203\)](#).

Setting up Trace and Track Inclusion Rules

Before you use lot tracing and lot tracking, you must set up trace and track inclusion rules. These rules let you specify the document types that the system monitors to trace and track lots. You must specify whether each document type applies to lot tracing, lot tracking, or both.

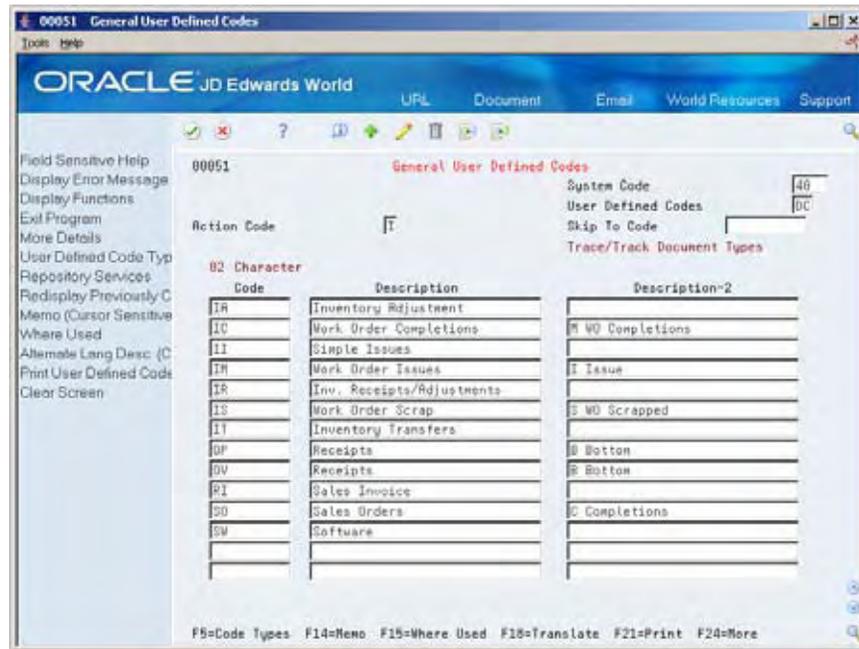
For example, if you use the Purchase Management system, you would specify that document type OP (purchase orders) applies to lot tracing. Then, each time you receive a lot item, the receipt transaction displays on Lot Tracing.

To set up trace and track inclusion rules



From any JD Edwards World menu, enter **UDC** on the command line

On General User Defined Codes



1. Access user defined code table 40/DC.
2. Complete the following fields for each document type:
 - 02 Character Code
 - Description
3. Assign one of the following values to each document type in the Description-2 field:
 - B (for bottom level, or tracing transactions)
 - C (for completion level, or tracking transactions)
 - Blank (for intermediate level transactions, which apply to both tracing and tracking)
 - I (for issue transactions)
 - M (for work order completions)

What You Should Know About

Issue transactions

You must include the issues document type (IM) in inclusion rules if you perform multi-level tracing and tracking. You must also assign the issues document type a value of I (issue transactions).

Receipt, adjustment, and sales transactions

Receipt and adjustment transactions cannot have a value of C (completion) on Trace/Track Inclusion rules. Sales transactions cannot have a value of B (bottom level). A sale is the last transaction that can occur for lot tracking.

How the system traces and tracks lot transactions

The system traces and tracks a lot by associating together corresponding transactions, such as a receipt, an issue, a completion, and a sales order. If the association is terminated, the system stops tracing and tracking. For example, if you do not include the completion document type in inclusion rules, the system stops tracking at the completion transaction.

Reclassify Lots

Reclassifying Lots



From Inventory Management (G41), choose **Inventory Master/Transactions**
From Inventory Master/Transactions (G4111), choose **Reclassifications**

You can reclassify an item and any associated lot when the item's properties change. When you reclassify, you create new item numbers and combine or split existing lots within locations.

You also may be able to create new lots if you have set the Inventory Lot Creation (Y/N) field in the branch/plant constants to allow you to do so.

For example, property changes that occur over time in technical grade sulphuric acid can result in a less potent grade of acid. You can create a new lot from this acid by specifying a different potency and grade.

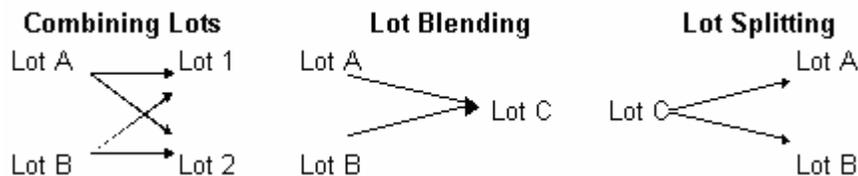
In a similar example, if you blend several lots of sulphuric acid together and dilute them with water, you can create a new lot with a new potency and grade.

You can change a lot and any of the associated items as follows:

- Change the item number, location, lot, and lot status
- Create a new lot from an existing lot
- Combine several lots into a single lot
- Split one lot into several lots
- Combine several lots and create several new lots

Example: Types of Reclassifications

The following graphic illustrates how you can combine, blend, and split lots.



After you reclassify an item and lot, the system adjusts inventory balances and performs related tracking and accounting tasks.

The system updates the following tables with item and lot change information:

- Item Ledger (F4111)

- Account Ledger (F0911)
- Item Location (F41021)
- Warehouse Location (F4602) - (only if you are using the Advanced Warehouse Management system with the Inventory Management system)

You can view detailed or summarized journal entries for these transactions on the Journal Entries and the Item Ledger Inquiry forms.

Before You Begin

- Verify that you have set up the general ledger accounts in the Account Master table (F0901)
- Verify that you have set up the automatic accounting instructions (AAIs) for distribution
- Review uncommitted quantity information for the item and related lot that you are reclassifying on Item Availability

Caution: Use the Item/Lot Change Transactions program *only* for reclassifying items and lots. Using any of these programs to reclassify items or lots can adversely affect information throughout the Sales Order Management and Procurement systems.

What You Should Know About

- | | |
|-----------------------------------|--|
| Reviewing lot information | You can review item and location information for a lot by accessing Lot Information. This form also displays the lot expiration date, the lot status, and so on.

See <i>Viewing Lot Availability</i> for more information. |
| Correcting errors | You can correct a reclassification made in error by entering a reversing entry. Because the system stores records of each reclassification for accounting purposes, you cannot delete the record. The system reverses the item in the same document number and batch as the original reclassification. |
| Recording document numbers | After you enter a reclassification, the system displays the document type, batch number, and document number for the transaction. Record the document number for locating the transaction. |
| Grouping reclassifications | After you enter several reclassifications, you can group them together for processing.

After you group transactions, the system assigns the same number to each transaction in the group and processes all of the From and To lines with the same transaction number.

Depending on how the processing options are set, the system validates that the From and To quantities balance. |

Reclassifying uncommitted quantities of items You can reclassify only uncommitted quantities of items and lots.

See *Item and Quantity Information* in the *Inventory Management Guide* for information about how to determine uncommitted quantities for an item.

Assigning items with multiple lot or serial numbers to a location

When you reclassify inventory, you might be able to assign items with multiple lot or serial numbers to a location

See *Assigning an Item to a Branch/Plant* in the *Inventory Management Guide* for more information.

Reclassifying bulk inventory

You cannot use the Item/Lot Change Transactions program to reclassify bulk inventory. Instead, use the Bulk Stock Movement program to reclassify bulk inventory.

To reclassify items and lots

On Reclassifications

1. To enter reclassification information, complete the following fields:

- From Branch/Plant
- To Branch/Plant (BU for Account Duplication)
- Trans. Date (Date - Order Transaction)
- Document Number (Document)
- Document Type
- Explanation

- G/L Date
2. Access the detail area.

4116 Reclassifications

Oracle JD Edwards World

UPL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Additional Information
Journal Entries
Warehouse Movement
Clear Screen

4116 Reclassifications

Trans. Date 06/30/17

Action Type F

Document Number 127

Document Type

G/L Date

Explanation Combine Lots

Batch Number 77518

From Branch/Plant. 30 To Branch/Plant. 30

Item	Quantity	UM	Location	Lot
F 0001	1	EA	30	00000004
T 0001	10	EA	30	00000005

Reason Code. Unit Cost. 16.1500 Grade

G/L Date 06/30/17 Extended Cost. 16.15 Potency

Trans. Line. 1.00 Branch/Plant 30 Lot Status

Lot Expires. 05/15/17 Lot Desc Natureway High Energy Vitamins

Memo Lot 1 Memo Lot 2

Reason Code. Unit Cost. 16.0000 Grade

G/L Date 06/30/17 Extended Cost. 160.00 Potency

Trans. Line. 1.00 Branch/Plant 30 Lot Status

Lot Expires. 08/26/17 Lot Desc Natureway High Energy Vitamins

Memo Lot 1 Memo Lot 2

Opt: 1=Item Search 2=Reverse 8=New Transaction F13=J/E F24=More

3. Complete the following fields for each branch/plant in which the item is stored:
 - F/T (From/To)
 - Item Number
 - Quantity
 - UM
 - Location
 - Reason Code
 - Unit Cost
 - Extended Cost
 - Trans. Line (Transaction Line Number)
4. To create a new location and record for the lot, complete the following fields:
 - Lot
 - Grade
 - Potency
 - Lot Desc
 - Lot Expires
 - Lot Status

The system processes the transaction and displays a document number, document type, and the batch number for the transaction.

Field	Explanation
To Branch/Plant	The destination business unit that you want to copy accounts to. <i>Form-specific information</i> The destination branch/plant that you want to move inventory to.
From/To	Indicates whether this line in the transaction is a From line or a To line. This field allows you to combine multiple existing products/locations into a single product/location, for example, three From lines and one To line. You can also split one existing product/location into several new products/locations, for example, one From line and two To lines. The information in a From transaction line is always existing item location information.
Trans. Line	The transaction line number keeps the different From and To lines for one transaction (for example, combining multiple lots into one or splitting one lot into several new ones) together by giving them the same transaction line number.
Prev Voucher:	The number of the last voucher that was entered.

Processing Options

See [Reclassifications \(P4116\)](#).

Review Availability and Shortages

Reviewing Availability and Shortages

Shop floor management includes the coordination of material handling, material availability, setup and tooling availability, and operator skills so that a job can be done in the most cost-effective manner. You can use availability and shortage tracking programs to determine what inventory you have and what inventory you need.

You should check the availability of the parts needed to complete a work order before you create the work order, or when the work order has been processed and is ready for release to the shop floor. You can check availability against a work order after the work order has been created. You can also check availability against a bill of material for a rate schedule, or before creating a work order for an item. You can choose to print shortages for specified components or print all shortages as well.

This section contains the following:

- [Defining Availability Calculations for a Branch](#)
- [Reviewing Availability](#)
- [Managing Shortage Information](#)
- [Printing Shortages](#)

What You Should Know About

Entering shortages

You can choose Order Item Shortage to enter a quantity short for an item associated with the work order. You can also specify how to fill the shortage. However, you should use the Shortage Maintenance program to maintain quantity shortages.

Defining Availability Calculations for a Branch



From Inventory Management (G41), enter 29
From Inventory System Setup (G4141), choose Branch/Plant Constants

The system uses the quantities defined for each branch in the Inventory Management system to calculate availability. Therefore, you indicate the quantities you want the system to add or subtract from the on-hand balance when the system calculates availability at your branch. If you leave any field blank, the system excludes that quantity from the calculation.

To define availability calculation for a branch/plant

On Branch/Plant Constants

1. Choose Item Availability.

410011 Item Availability Definit

ORACLE JD Edwards World

UPL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Clear Screen

410011 Item Availability Definition

Action Code C

Branch/Plant R30 Memphis Mfg. Plant

Quantity on Hand

Subtract:

Quantity Soft Committed to SO & WO

Quantity Hard Committed to SO

Quantity Future Committed to SO

Quantity Hard Committed to WO

Other Quantity 1 SO

Other Quantity 2 SO

Quantity on Hold

Safety Stock

Add:

Quantity on Purchase Order Receipts.

Quantity on PO - Other 1

Quantity on Work Order Receipts

Quantity in Transit

Quantity in Inspection

Quantity in Operation 1

Quantity in Operation 2

F9=Exit

2. On Item Availability Definition, review the following default information:

- Branch/Plant

3. To subtract a quantity, complete the following optional fields:

- Quantity Soft Committed to SO & WO
- Quantity Hard Committed to SO
- Quantity Future Committed to SO
- Quantity Hard Committed to WO
- Other Quantity 1 SO
- Other Quantity 2 SO
- Quantity on Hold
- Safety Stock

4. To add a quantity, complete the following optional fields:

- Quantity on Purchase Order Receipts
- Quantity on PO - Other 1
- Quantity on Work Order Receipts
- Quantity in Transit
- Quantity in Inspection

- Quantity in Operation 1
- Quantity in Operation 2

Reviewing Availability

You should check the availability of the items required to make a certain quantity of a parent item before you create a work order or rate schedule. You can check the availability of a part or the availability of a parts list.

Reviewing availability consists of:

- Reviewing part availability
- Reviewing parts list availability

To review part availability



From Product Data Management (G31), choose **Daily Order Preparation - Discrete (G3111)**
From Daily Order Preparation - Discrete (G3111), choose **Part Availability**

On Part Availability

0 Lvl	Component Item	Description	Required	On Hand	Available	UN
1	4277	FRAMING KIT, 30x60 D	1	550	329	EA
1	4133	SIDE ASSY, 30x30 OAK	4	2700	1010	EA
1	3999	BACK, OAK, 30x60, DE	1	700	479	EA
1	3881	DRAWER SLIDES & HARD	7	1800	253	EA
1	3980	CENTER DRAWER FOR 30	1	600	579	EA
1	3401	SIDE DRAWER, 30x60 D	4	1300	415	EA
1	3982	FILE DRAWER, DESK, U	2	1000	550	EA
1	4210	OAK DESK TOP 30 x 60	1	4311	779	EA
1	2111	SEMI GLOSS HI TEST V	2	7422	358	GA
1	5666	CHAIR, 5 LEG, W/TILT	1	4211	506	EA

1. Complete the following fields:
 - Branch/Plant
 - Parent Item
2. Complete the following optional field:
 - Requested Quantity

Field	Explanation
Requested Quantity	The number of parent items you want to process. The system calculates lower-level values in quantity per the number of parent items requested. For example, if 3 components are needed for a parent item, and the requested quantity is 10, the system plans for 30 components.
Required	The number of units to which the system applies the transaction. <i>Form-specific information</i> For Shop Floor Control: The quantity of the component required.
Available	The quantity available can be the on-hand balance minus commitments, reservations, and backorders. Availability is user defined and can be set up in branch/plant constants.

Processing Options

See [Part Availability \(P30205\)](#).

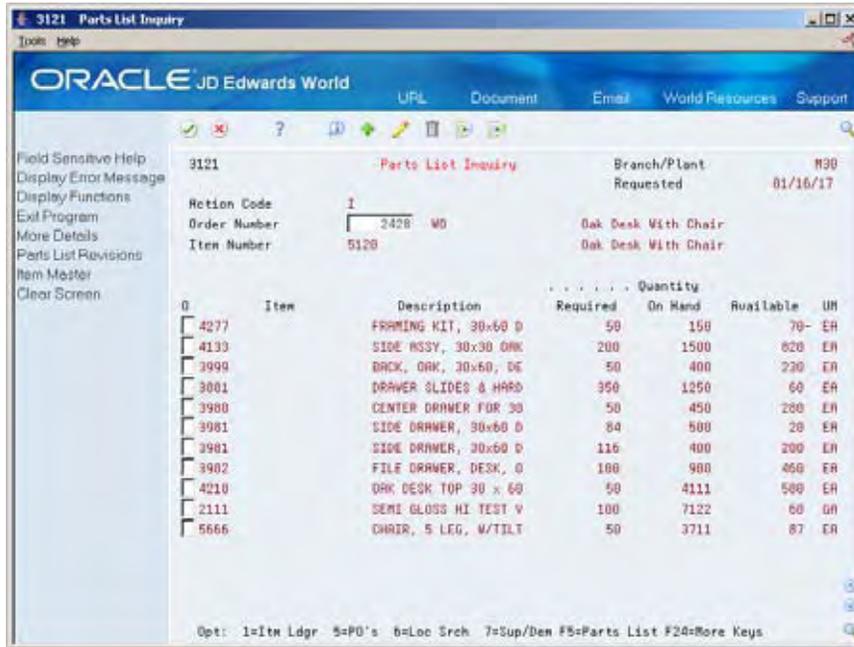
To review parts list availability

	From Product Data Management (G31), choose Daily Order Preparation - Discrete (G3111) From Daily Order Preparation - Discrete (G3111), choose Parts List Inquiry
---	---

You can review the availability of items by parts list required to complete the quantity of the parent item indicated on the work order.

If you created a soft commitment for the item, the quantities displayed indicate the item's availability at all locations. If you created a hard commitment for the item, only quantities from the hard-committed locations display. You can also display the quantities of each item that have hard and soft commitments to work orders and sales orders.

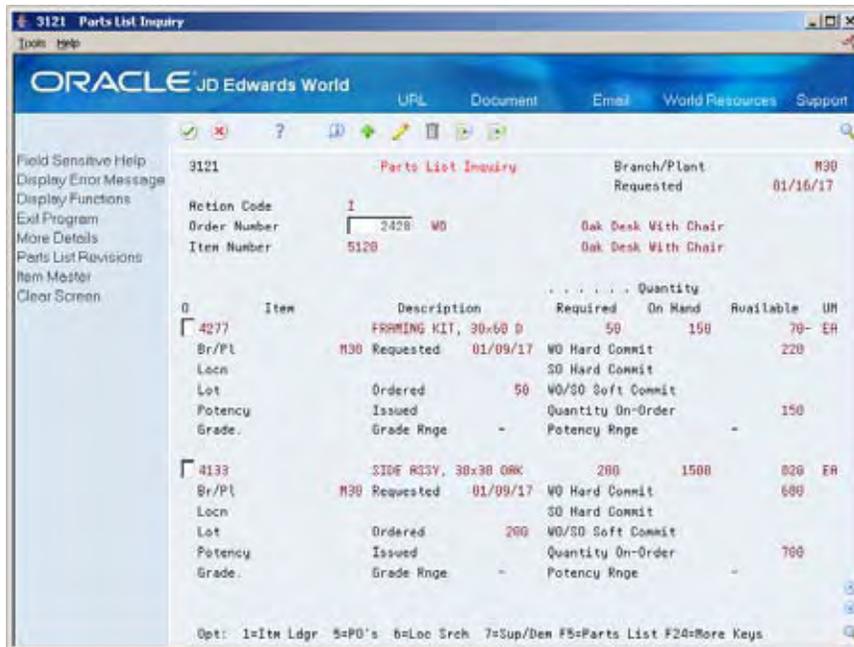
On Parts List Inquiry



1. Complete the following field:

- Order Number

2. Access the detail area.



Field	Explanation
Required	The total quantity requested.

Field	Explanation
WO Hard Commit	The number of units hard committed to work orders in the primary unit of measure.
SO Hard Commit	The number of units committed to a specific location and lot.
WO/SO Soft Commit	The number of units that are soft-committed to sales orders or work orders in the primary units of measure.
Quantity On-Order	The number of units specified on the purchase order, in primary units of measure.

Processing Options

See [Parts List Inquiry \(P3121\)](#).

Managing Shortage Information

Shortages occur when you do not have enough of the required materials to complete the quantity of the parent item requested on a work order. When you check the availability of items against a bill of material or a work order, the system displays short items with a negative available quantity.

You track shortage information for:

- Purchased parts that you obtain from a single source
- Purchased parts that are difficult to obtain
- Parts that have a long leadtime
- Parts whose absence will stop the production line
- Parts that are expensive to purchase or manufacture
- Parts that require close monitoring

Managing shortage information includes the following tasks:

- Locating shortages
- Changing shortage information

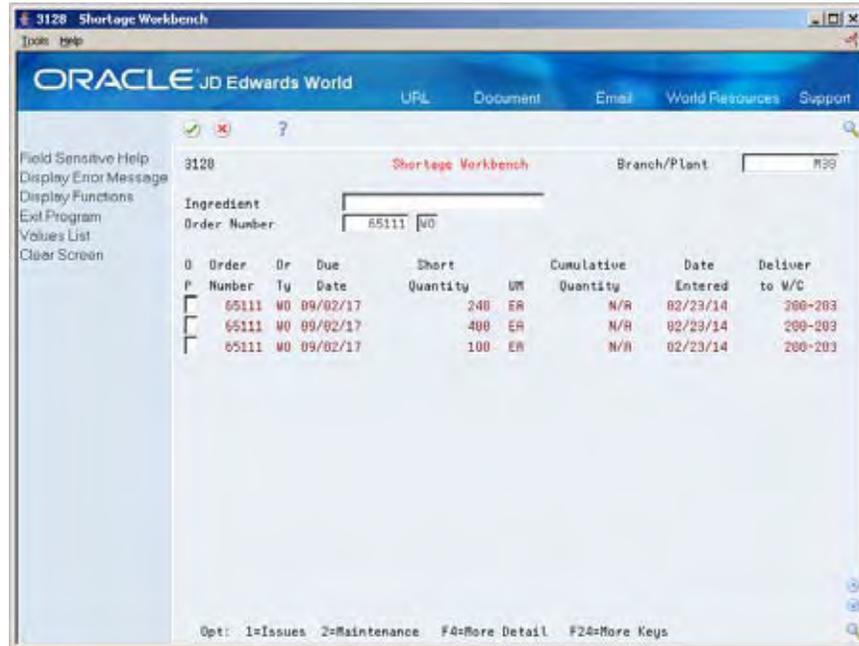
To locate shortages

	From Product Data Management (G31), choose Daily Order Preparation - Discrete (G3111) From Daily Order Preparation - Discrete (G3111), choose Shortage Workbench
---	---

You can locate shortage information for an item that is associated with one or more work orders using the shortage workbench. Use the workbench to determine the amount of a shortage and how the shortage will be filled. You can locate item shortages by:

- Branch/plant and item number
- Branch/plant, item number, order number, and order type
- Order number and order type
- Order type

On Shortage Workbench



Complete the following fields:

- Branch/Plant
- Item Number

Processing Options

See [Shortage Workbench \(P3128\)](#).

To change shortage information

	From Product Data Management (G31), choose Daily Order Preparation - Discrete (G3111) From Daily Order Preparation - Discrete (G3111), choose Shortage Maintenance
---	---

You can change component shortage information by item, work order, branch/plant, and work order type, or any combination of these. You can also review information that indicates how shortages will be filled, as well as change this information.

There are several forms you can use to manage shortage information. You specify in the processing options which versions of the shortage programs that the system uses and the default order type that the system displays.

On Shortage Maintenance

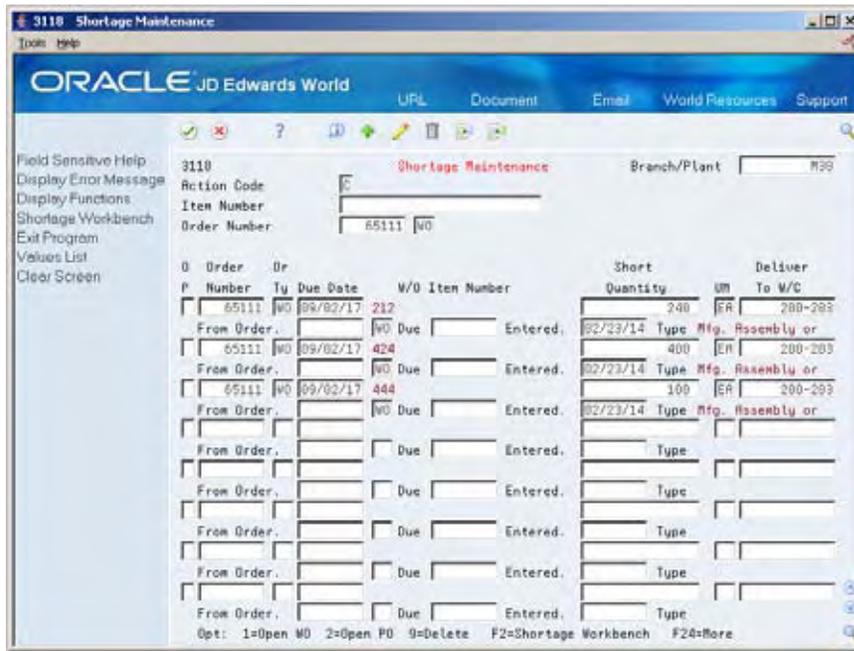
The screenshot shows the 'Shortage Maintenance' form in Oracle JD Edwards World. The form title is '3110 Shortage Maintenance'. The 'Branch/Plant' is set to 'R39'. The 'Order Number' is '85111' and the 'W/O' is 'W0'. The table below shows the following data:

Order	Or	Short Quantity	Deliver To W/C
85111	W0	200	EA 200-203
85111	W0	400	EA 200-203
85111	W0	100	EA 200-203

At the bottom of the form, the following options are listed: Opt: 1=Open W0 2=Open PO 9=Delete F2=Shortage Workbench F24=More

1. Complete the following fields:
 - Branch/Plant
 - Item Number
 - Order Number
2. Review the following default information:
 - Due Date
 - Short Quantity
 - Deliver to Work Center

3. Access the detail area.



4. Review the following default information:

- From Order
- Due

Field	Explanation
Due	The requested date for a Purchase Order created thru Direct Ship or Transfer Order entry. If you leave this field blank, the system uses today's date, which can be overridden at any time. <i>Form-specific information</i> The date that the component is needed. If you leave this field blank, the system uses the date in the work order parts list.

Processing Options

See [Shortage Maintenance \(P3118\)](#).

Printing Shortages

You can choose to print shortage information using two DREAM Writer programs. You can:

- Print component shortages
- Print all shortages

What You Should Know About

Warehouse Management interface

If you are using Warehouse Management, the system does not include parts that have a status of In Warehouse in the Component Shortages report.

Printing Component Shortages

From the Periodic Functions - Discrete menu (G3121), choose Component Shortages.

The Component Shortages report uses Quantity Available as a starting number for calculating shortages. The report lists the component parts required to complete a work order and indicates their current availability. It includes:

- Quantities available
- Quantities on order
- Quantities required
- Quantities short

Use the processing option to print only parts that are short. If a short part is on more than one order, a shortage prints only when the on-hand quantity plus on order quantity minus the required quantity is negative.

You can also generate this report as part of the shop paperwork when you run Order Processing.

31418		JD Edwards World						Page	-	2
		Work Order Component Shortage List						Date	-	14/03/18
W.O. Number	Ty	Item Number	Item Description	Start Date	Planner	Quantity Available	Quantity On Order	Quantity Required	Quantity Short	UM
16451	WO	COMP2	Component #2 - Grade C	28/02/15		442-		200	200-	EA
		COMP3	Component #3 - Regular	28/02/15		3000-		300	300-	EA
16513	WO	COMP2	Component #2 - Grade C	03/03/15		642-		40	40-	GA
16514	WO	COMP1	Component #1 - Potency	03/03/15		1		13	12-	GA
		COMP2	Potency 10,000- 65,000 Component #2 - Grade C	03/03/15		682-		26	26-	GA
64995	WO	COMP1	Component #1 - Potency	21/12/14		12-		10	10-	EA
		COMP2	Component #2 - Grade C	21/12/14		708-		2224	2224-	EA
		COMP3	Component #3 - Regular	21/12/14		3300-		333	333-	EA
		COMP3	Component #3 - Regular	21/12/14		3633-		30	30-	EA
68241	WO	CHOCOLATE	Chocolate	03/01/15				5000	5000-	LB
		MILK	Potency Milk - 100,000	03/01/15				500	500-	QT
		CARAMEL	Potency Caramel - 100,000	03/01/15				600	600-	OZ
		CASHEWS	Potency Cashews - 100,000	03/01/15				100	100-	GM

Processing Options

See [Component Shortages \(P31418\)](#).

Printing All Shortages

From the Periodic Functions - Discrete menu (G3121), choose All Shortages.

The All Shortages report lists shortage details for items in the Shortage Maintenance Master table (F3118). Processing options control whether the report contains one or two lines of detail information about each short item. You can set your DREAM Writer selections to sort and total the information.

3118P		JD Edwards World				Page - . . . 2			
		Shortage Revisions Print				Date - . . . 14/03/18			
Branch/Plant	Item	Description	Order Number	Or Ty	Due Date	Deliver To Branch/Plant	Deliver To Desc.	Short Quantity	UM
NY	CJ02	Chair Arms	157825	WO	16/01/15	NY	New York Warehouse	100	EA
Date Entered 17/01/15		From Order.		WO	Type	. Configured Item			
		Branch				New York Warehouse		100	EA
10	4664D	4664-D	156697	WO	09/01/15	10	Modesto Distributio	100	EA
Date Entered 10/01/15		From Order.		WO	Type	. Mfg. Assembly or Sub-Assembly			
		Branch				Modesto Distribution Center		100	EA
CHI	3980	CENTER DRAWER FOR 30x6	1821	WO	25/05/18	CHI	Chicago Warehouse	20	EA
Date Entered 25/05/18		From Order.		WO	Type	. Mfg. Assembly or Sub-Assembly			
CHI	3981	SIDE DRAWER, 30x60 DES	1821	WO	25/05/18	CHI	Chicago Warehouse	80	EA
Date Entered 26/05/18		From Order.		WO	Type	. Mfg. Assembly or Sub-Assembly			
CHI	2111	SEMI GLOSS HI TEST VAR	1821	WO	25/05/18	CHI	Chicago Warehouse	40	EA
Date Entered 25/05/18		From Order.		WO	Type	. Purchased inc. Raw Material			
CHI	5666	CHAIR, 5 LEG, W/TILT	1142	WO	09/01/18		48-204 Final Assembly/Insp	50	
Date Entered 10/01/18		From Order.		WO	Type	. Purchased inc. Raw Material			
CHI	5666	CHAIR, 5 LEG, W/TILT	1151	WO	16/01/18	WAREHOUSE	Warehouse Storage	150	
Date Entered 17/01/18		From Order.		WO	Type	. Purchased inc. Raw Material			
CHI	5666	CHAIR, 5 LEG, W/TILT	1821	WO	25/05/18	CHI	Chicago Warehouse	20	EA
Date Entered 27/05/18		From Order.		WO	Type	. Purchased inc. Raw Material			
CHI	123	HARDWARE KIT	1821	WO	25/05/18		200-103 Screw Machine	40	EA
Date Entered 03/03/15		From Order.		WO	Type	. Purchased inc. Raw Material			
		Branch				Chicago Warehouse		160	EA
YARD	AR101278	Engine Oil Filter	157585	WM	02/04/15		MECH Mechanical	1	EA
Date Entered 18/01/15		From Order.		157649	WO	Type	. Purchased inc. Raw Material		
YARD	AR101278	Engine Oil Filter	157585	WM	02/04/15	YARD	Yard	1	EA
Date Entered 18/01/15		From Order.		WO	Type	. Purchased inc. Raw Material			
		Branch				Yard		2	EA
								362	EA

Understand Issue Transactions Overview

About Issue Transactions

Regardless of whether you use work orders or rate schedules for an item you produce, you must send the required materials to the shop floor for production. You must also deduct the quantities that are issued to the shop floor from inventory through an issue transaction. The Shop Floor Control and Manufacturing Accounting systems use issue transactions to determine the actual quantities of materials that are used in the production process, according to the routing instructions for the work order or rate schedule.

This section contains the following:

- [When Do You Issue Inventory?](#)
- [How Do You Issue Inventory?](#)
- [From Where is Inventory Issued?](#)
- [What Tables Store Data when Issuing Inventory?](#)
- [Where in the Process Do You Issue Inventory?](#)

When Do You Issue Inventory?

You do not have to generate an issue transactions at the same time inventory is physically moved. The JD Edwards World Shop Floor Control system allows you to choose at what point in the production process you want to generate issue transactions. In other words, you can choose when you want your inventory records to reflect the issue of materials to the work order or rate schedule.

For example, in the case of a short production cycle, you might want to deduct the issued inventory and receive the completed product into inventory at the same time when you report full completions against the work order or rate schedule. For longer processes, you might need to generate issue transactions at various operations within the routing to minimize the discrepancies between materials actually on the shop floor and materials for which the inventory lists as being on the shop floor.

How Do You Issue Inventory?

You can choose any of the following methods to issue inventory:

Method	Description
Manual issues	The system deducts materials from inventory when you enter the issue transactions on the Issues form. <i>See Issuing Materials Manually.</i>
Preflushing	The system automatically deducts materials from inventory when you process a work order using the Order Processing program. <i>See Issuing Materials by Preflushing.</i>
Backflushing	The system deducts materials from inventory when you report items on the work order or rate schedule as complete. This can occur when you report partial completions throughout the production process or when you report full completions at the last routing operation. <i>See Completing a Work Order through Backflush.</i>
Super Backflushing	The system automatically deducts materials from inventory at operations defined as pay points throughout the routing. Super backflush allows you to backflush materials and labor hours, and to report items as complete at the same time. <i>See Processing a Work Order by Super Backflush.</i>

All of these methods are available when you use work orders. If you are using rate schedules, backflushing is the only method that JD Edwards World recommends.

The issue transaction forms are similar for work orders and rate schedules. Issue transactions for work orders are conducted on the Issues form. Issue transactions for rate schedules are conducted on the Rate Base Inventory Issues form.

Some issue methods allow you to issue materials without having to display the Issues form. Other methods display the issue transaction for your review before the system records it.

You can perform partial issues by setting up the rate for the week and issuing a backflush daily. For example, if your rate for the week is 10,000, and your daily backflush is 2,000, you can perform a partial issue of 2,000 for five days. On the fifth day, your rate schedule is completed.

The transaction date for issue transactions is the current system date. You can enter a different date. If you issue too much of one item, the system displays an error message. You can either adjust the issue quantity or accept the issue.

Processing options control whether the Operation Sequence and Date Requested fields allow you to enter an issue type code to restrict the items listed for issue.

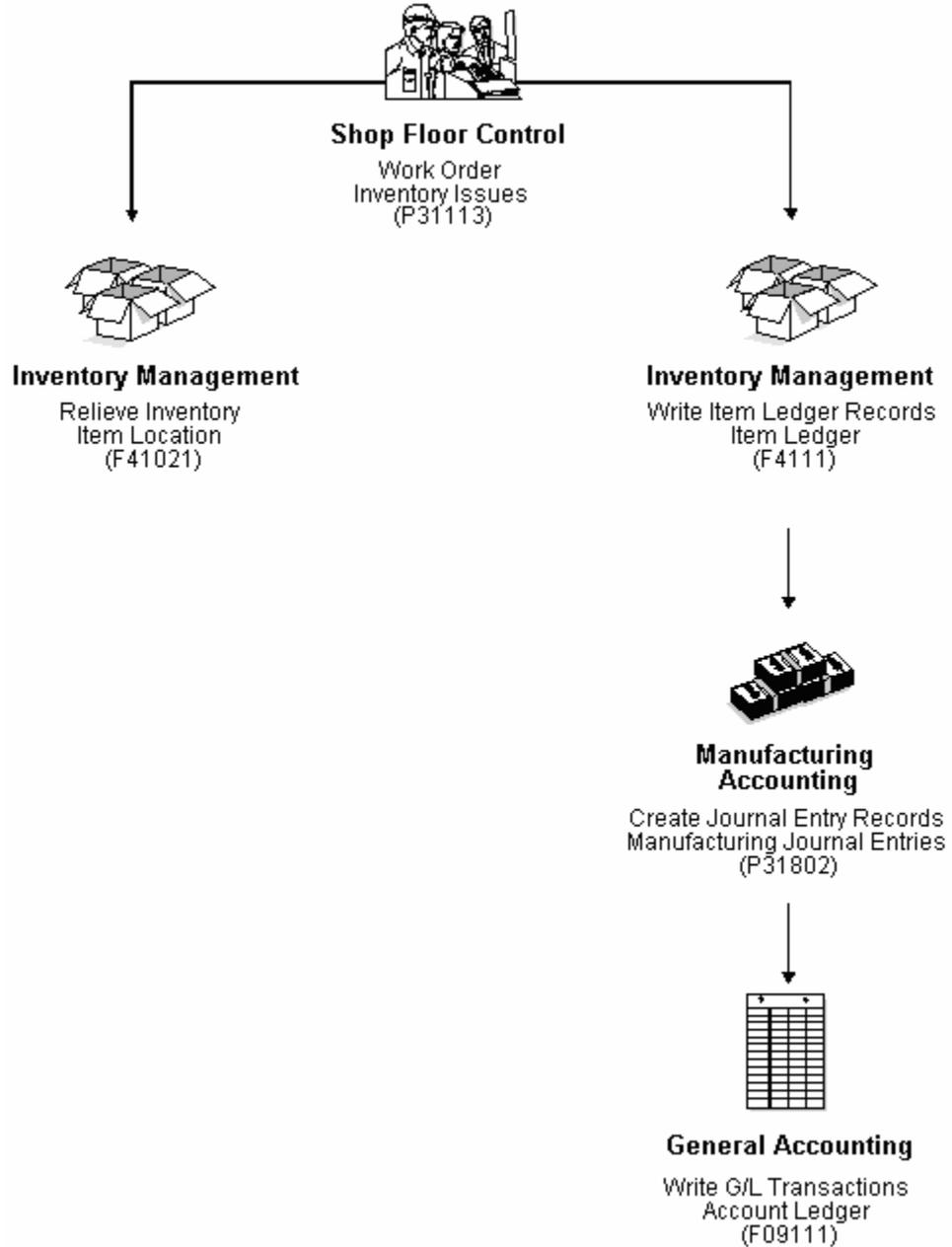
From Where is Inventory Issued?

Inventory is issued from the location at which it is committed. You can change the commitment location for an item, so that it will be issued from a different location.

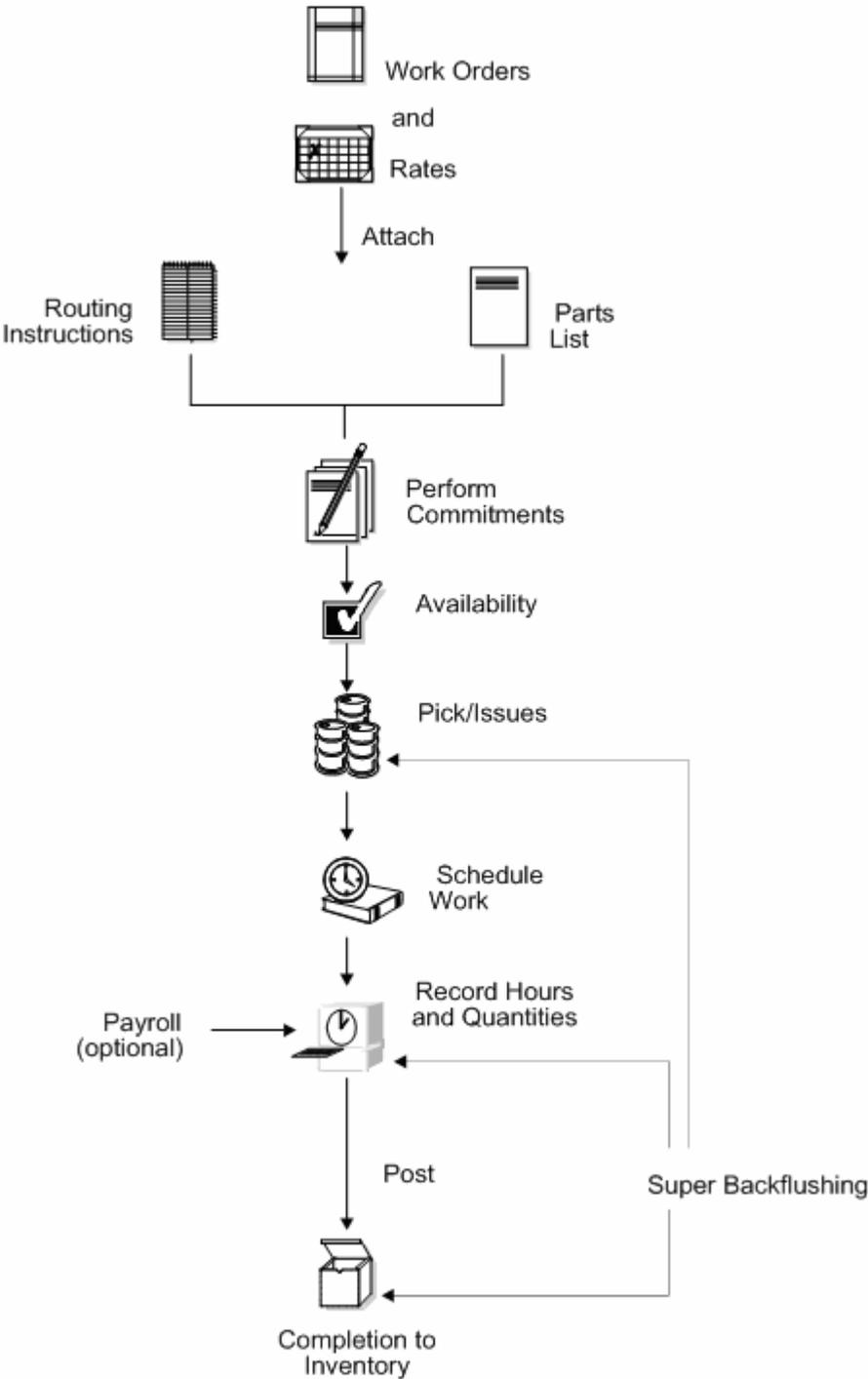
If you are issuing a grade or potency controlled item from a lot, and the lot grade or potency rating isn't within the desired range, the system displays a warning message.

What Tables Store Data when Issuing Inventory?

The following graphic shows the tables that the system updates when you issue inventory.



Where in the Process Do You Issue Inventory?



See Also

- *Completing Rate Schedules (P3114)* for information on recording completions for rate schedules

- *Setting Up Default Location Information* in the *Inventory Management Guide* for more information on specifying locations for a commitment
- *Understanding Lot Processing* for information on issuing material that is lot controlled
- *Understanding Grade and Potency* for information on issuing material that is grade or potency controlled

Issue Materials

Issuing Materials

You can issue materials without recording a completion to a work order. You can also record scrapped component quantities and the reason for the scrap.

Note: If you have repeated items in the bill of material, make sure that the operation sequence numbers for those lines are unique for the bill of material.

This section contains the following:

- [Issuing Materials by Preflushing](#)
- [Issuing Materials Manually](#)
- [Recording Component Scrap](#)

What You Should Know About

Warehouse Management interface

If you are using Warehouse Management and issuing materials to a work order, the system does not issue any part with a status of In Warehouse. You need to update the status to Out of Warehouse by pick confirmation before the system issues the part.

See *Advanced Warehouse Management Guide* for information on how to confirm a pick request.

Blending, filling, and packaging

Work order issues allow you to enter ambient quantities and current temperature and/or density information. The system calculates and stores the standard quantity and weight accordingly.

When you issue inventory to a blending/filling location the system checks the allowed products matrix for an incompatibility between the allowed product from the blending tank and the ingredients list at the time of issue.

The system calls Bulk Products for each item issued that is a bulk product.

When you issue inventory the system allows you to access the Dip Volume Calculator/Meter Readings program to enter readings.

See *Bulk Stock Management Guide*.

See Also

- *Understanding Grade and Potency* for information on issuing material that is grade or potency controlled

Issuing Materials by Preflushing

	From Shop Floor Control (G31), choose Discrete Daily Order Preparation From Daily Order Preparation - Discrete (G3111), choose Order Processing
---	--

Preflushing is recording issue transactions for all material required for a work order when you process the work order, using the Order Processing batch program. This includes materials that are not required until the last operation in the routing, which could occur weeks or months in the future. These items are issued at the start date of the work order when you use the Order Processing program, as well.

Caution: JD Edwards World recommends that you do not use the preflushing method unless your manufacturing cycle time is short enough to ensure that materials are physically moved to the shop floor within the same day that the issue transaction is recorded. If your cycle time is longer than a day, a discrepancy will appear in your inventory records because the materials have been deducted from inventory records, but not physically removed from inventory stock.

Before You Begin

- Set the issue type code on the parts list

What You Should Know About

Issuing preflush items only You can set a processing option in the Automatic Batch Issue program to issue only preflush items. If you leave this processing option blank, the system preflushes all items associated with the work order.

Issuing Materials Manually

	From Shop Floor Control (G31), choose Discrete Daily Order Preparation From Daily Order Preparation - Discrete (G3111), choose Inventory Issues
---	--

You can issue materials manually either from one location or from multiple locations, if you specified item quantities to be used from several locations. You use the Inventory Issues form to issue material associated only with a work order. To issue material associated with a rate schedule, you use the Rate Base Inventory Issues form. The steps for working with both forms are the same.

You can also use the Inventory Issues program to change the commitments that the system recorded. When you change commitments, the system displays an error message if the quantities do not add up to the total quantity required. It also adjusts the available balance for any location in which you changed the quantity committed.

Complete the following tasks to manually issue material:

- Issue material from a single location
- Issue material from multiple locations (optional)

What You Should Know About

Issuing materials for a parent quantity	Use the Issue Material For field to issue materials for a parent quantity, which indicates how many sets of parts are needed. The Quantity Issued field indicates the quantity of each component that the system deducted from inventory.
Reversing an issue transaction	To reverse an issue transaction, change the item quantity that you want to reverse to a negative number. The system decreases the amount in the Quantity Issued field for the item by the amount of the reversal.
Closing out materials	To close out items that you no longer need, change the item using the Close Out selection. "Closed" appears in the Issues field for any item you close out.
Assigning serial numbers	If you did not assign a serial number to any of the components on your work order at order entry, you can assign them during inventory issues.
Associating components	You can associate components with a specific serialized assembly during inventory issues. If you do not know the assembly number, choose Retrieve Work Order Lot Serial Numbers to view numbers previously assigned to work order assemblies.

See Also

- *Completing Rate Schedules (P3104)*

To issue material from a single location

On Inventory Issues

31113 Inventory Issues

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UPL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Shortage Revisions
Exit Program
More Details
Inventory Issues Inquiry
Work Order Header
Retrieve Work Order Lo
Clear Screen

31113 Inventory Issues Branch/Plant Node R30 Netted

Action Code
Order Number 133920 WD
Item Number 5120
Quantity Ordered 40 ER
Issue Material for 40 ER
Order Date 12/06/06

Oak Desk With Chair
Oak Desk With Chair
Skip to Op Seq
Skip to Req'd

Op Seq	Item	St	Qty Ordered	Qty Issued	Issues	UM
1	4277	10.00	40		40	ER
1	3001	30.00	140		140	ER
1	3900	30.00	20		20	ER
1	3981	30.00	76		76	ER
1	3982	30.00	80		80	ER
1	3001	30.00	140		140	ER
1	3900	30.00	20		20	ER
1	3981	30.00	64		64	ER

Opt: 1=Process Issue 4=Multi-Location F5=Item Ledger F24=More Keys

1. Complete the following fields:
 - Order Number
 - Branch/Plant
2. Complete the following optional fields:
 - Status
 - Issues
3. Review the following default information:
 - Unit of Measure
4. Access the detail area.

31113 Inventory Issues

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Field Sensitive Help
Display Error Message
Display Functions
Shortage Revisions
Exit Program
More Details
Inventory Issues Inquiry
Work Order Header
Retrieve Work Order L
Clear Screen

31113 Inventory Issues Branch/Plant R30
Mode Netted

Action Code
Order Number 133428 WD Oak Desk With Chair
Item Number 5128 EA Oak Desk With Chair
Quantity Ordered 40 EA
Issue Material for 40 LN Skip to Op Seq
Order Date 12/06/06 Skip to Req'd

Item	Up Seq	St Qty Ordered	Qty Issued	Issues	UM
4277	10.00	40		40	EA
Branch/Plant R30 Location Lot					
Desc FRAMING KIT, 30x60 DESK Memo 1. Lot/SN Grade					
Requested Date 06/24/17 Memo 2. Potency					
3881	30.00	140		140	EA
Branch/Plant R30 Location Lot					
Desc DRAWER SLIDES & HARDWARE, 30in Memo 1. Lot/SN Grade					
Requested Date 06/24/17 Memo 2. Potency					
3980	30.00	20		20	EA
Branch/Plant R30 Location Lot					
Desc CENTER DRAWER FOR 30x60 DESK Memo 1. Lot/SN Grade					
Requested Date 06/24/17 Memo 2. Potency					

Opt: 1=Process Issue 4=Multi-Location F5=Item Ledger F24=More Keys

5. Review the following default information:

- Location
- LSN

Field	Explanation
UM	A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.
	<i>Form-specific information</i>
	If you leave this field blank, the system uses the value from the Parts List table and updates the quantities in the Item Location table in the primary unit of measure.

To issue material from multiple locations

This task is only necessary to issue material from different locations than what is listed on the Inventory Issues form.

On Inventory Issues

1. Complete the following field:
 - Order Number
2. Choose Select Multiple Locations.



3. On Select Multiple Locations, review the following default information:

- Quantity
- Location
- Lot
- Branch/Plant

Field	Explanation
Available	The quantity available can be the on-hand balance minus commitments, reservations, and backorders. Availability is user defined and can be set up in branch/plant constants.

Processing Options

See [Work Order Inventory Issues \(P31113\)](#).

Recording Component Scrap

	From Shop Floor Control (G31), choose Discrete Daily Order Preparation From Daily Order Preparation - Discrete (G3111), choose Component Scrap
---	---

You can use the Component Scrap program to record scrapped quantities of component items in the Item Ledger (The CARDEX) table and the Shop Floor Control Parts List table (F3111). The Item Ledger provides an audit trail of the quantity scrapped and the reason for the scrap transaction.

When you use the Component Scrap program, note the following important information:

- You cannot scrap components unless they have been issued to a work order.
- The total quantity scrapped for a component cannot exceed the total quantity issued to the work order.

- Negative transactions are allowed unless the transaction quantity would cause a negative issue.
- You can enter scrap transactions in any unit of measure. The scrapped quantity will be converted to the unit of measure of the parts list and rounded to one whole unit of measure when the system updates the Shop Floor Control Parts List table (F3111).

What You Should Know About

Resources

The system uses the order number information from the Work Order Master table (F4801) and the component information from the Shop Floor Control Parts List table (F3111).

To record component scrap

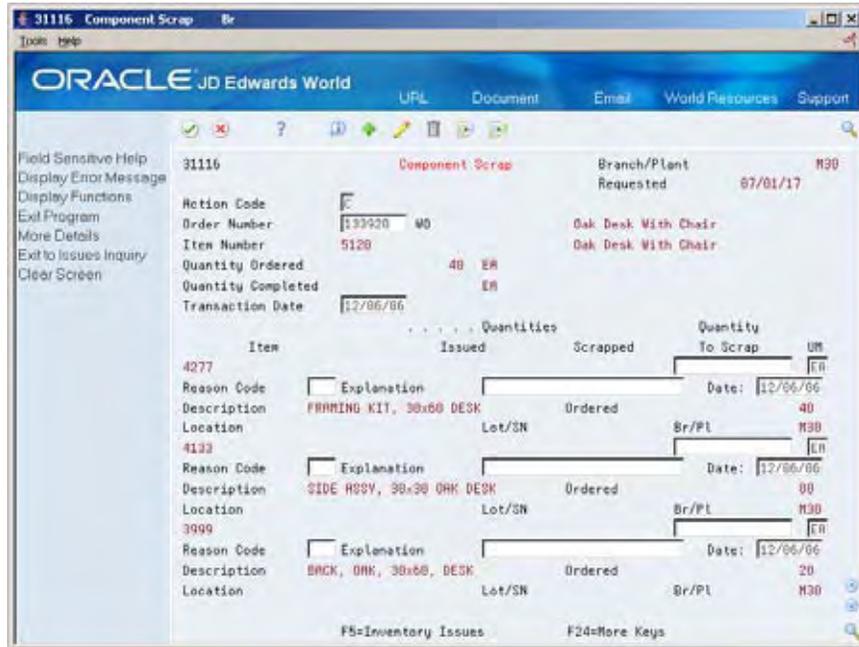
On Component Scrap

Item	Issued	Scrapped	Quantity To Scrap	UM
4277				EA
4133				EA
3999				EA
4133				EA
3999				EA
3001				EA
3900				EA
3981				EA
3982				EA
3001				EA
3980				EA
3981				EA

1. Complete the following fields:

- Order Number
- Transaction Date
- Quantity To Scrap

2. Access the detail area.



3. Complete the following optional fields:

- Reason Code
- Explanation
- Date

Field	Explanation
Reason Code	A user defined code (system 31, type RC) that indicates the reason for the quantity scrapped at this operation.
Explanation	This text identifies the reason that a transaction occurred.

Processing Options

See [Component Scrap \(P31116\)](#).

Schedule Work Orders

Scheduling Work Orders

As part of your scheduling activities, you can monitor work order progress, manage work order releases, and update the status of any order to keep your material planning schedule valid. When you work with schedules, you can display manufacturing work orders by item, planner, customer, parent work order, status, type, and priority, or a combination of these. You can also display work orders by start date or requested date and you can enable the system to sort them by either start date or requested date. You can set these defaults for the form in the processing options.

Processing options also determine the default values for various fields and control which versions of associated programs are used when you access them. You can also access related information, such as work orders, sales orders, purchase orders, parts lists, and routing instructions.

After a work order is on the shop floor, you must review the order and check capacity at each work center that the order is scheduled to go through. You might need to change a schedule to keep the Material Requirements Planning and Master Production Scheduling schedules valid.

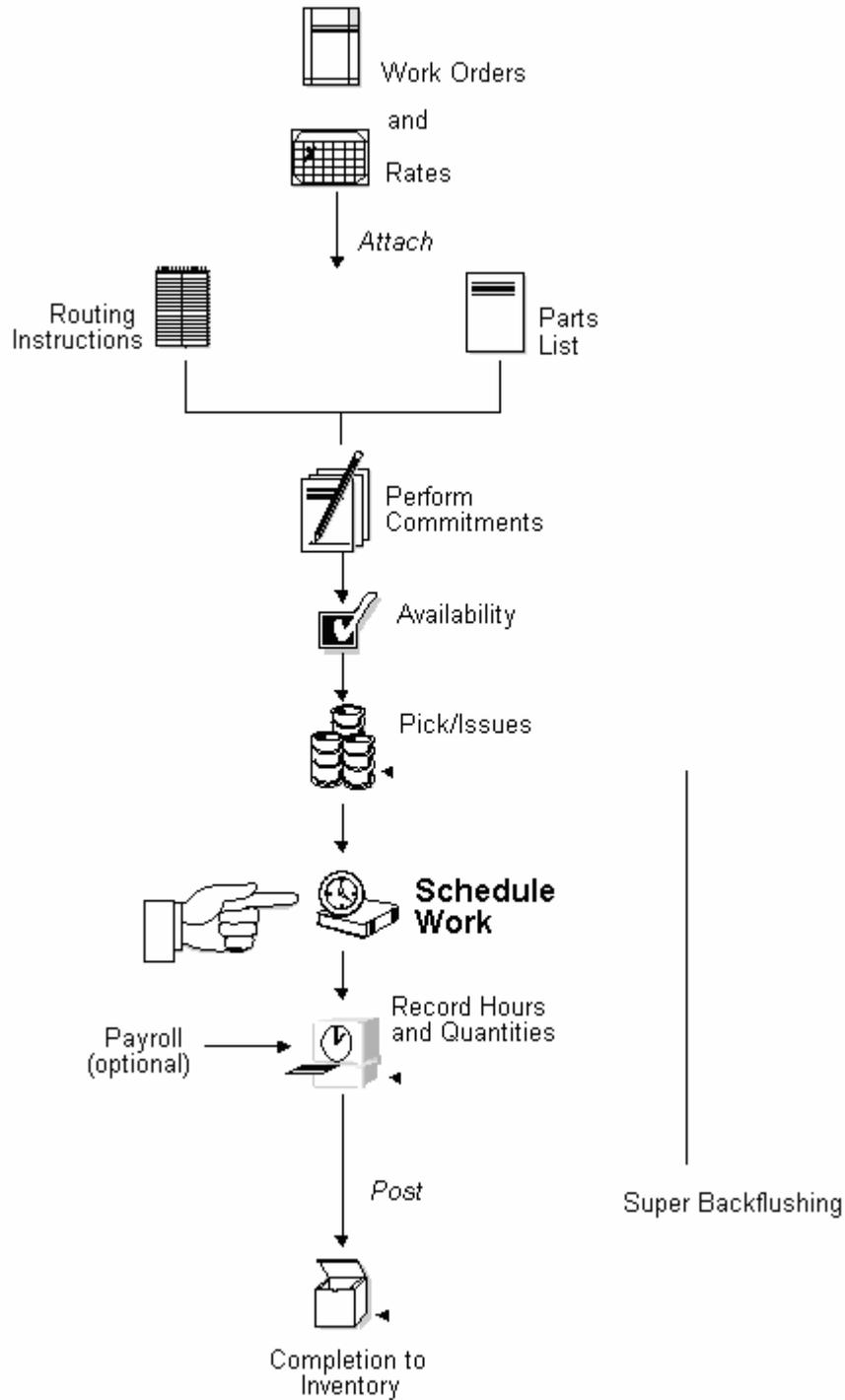
This section contains the following:

- [Where in the Process Do You Schedule Work?](#)
- [Reviewing Work Order Information](#)
- [Revising Work Order Information](#)
- [Printing Scheduling Information for Work Centers](#)

See Also

- *Appendix B — Leadtimes* for information on how the system calculates leadtime for a work order
- *Reviewing Material Information (P4021)*

Where in the Process Do You Schedule Work?



Reviewing Work Order Information



From Shop Floor Control (G31), choose **Discrete Daily Order Preparation**
 From Daily Order Preparation - Discrete (G3111), choose **Shop Floor Workbench**

After a work order is on the shop floor, you must review the order and check capacity at each work center that the order is scheduled to go through. When you review a work order, you can change the status, type, priority rating, freeze code designation, or type of flash message.

The Shop Floor Workbench program provides centralized access to the functions organizations need to manage and monitor the work order process. As well as being able to view the parts list and routings for the listed work orders, there are options to either view or edit the associated sales and purchase orders. The program also provides access to Work Order Completions and Super Backflush.

To review work order information

On Shop Floor Workbench

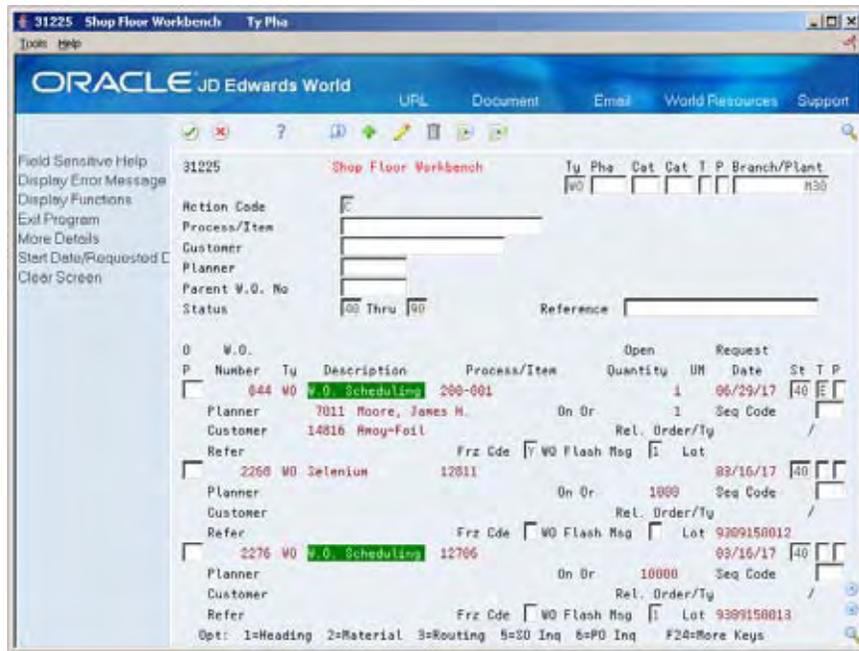
W.O. Number	Ty	Description	Process/Item	Open Quantity	Request Date	St T P
044	W0	V.O. Scheduling	200-001	1	06/29/17	40 E
2268	W0	Selenium	12811		03/16/17	40
2278	W0	V.O. Scheduling	12786		03/16/17	40
2284	W0	V.O. Scheduling	12781		03/16/17	40
2292	W0	V.O. Scheduling	1261		03/16/17	40
2339	W0	Operation Sched	PC486	1	06/15/17	40
2340	W0	Operation Sched	PC486	1	06/16/17	40
2356	W0	Operation Sched	PC486	1	06/22/17	40
2364	W0	V.O. Scheduling	PC486	1	06/30/17	40
2372	W0	GRK SHELF UNIT	333	400	01/09/17	40
2399	W0	V.O. Scheduling	5120	2500	01/02/17	01 S
2410	W0	V.O. Scheduling	5120	3808	01/09/17	01 S

Opt: 1=Heading 2=Material 3=Routing 5=SO Inq 6=#0 Inq F24=More Keys

1. Complete the following field:
 - Branch/Plant
2. Complete the following optional fields:
 - Document Type
 - Phase/Matter Code
 - Category Code 2
 - Category Code 3

- Work Order/ECO Type
- Work Order Priority
- Parent Item
- Planner
- Customer
- Parent Work Order Number
- Status From
- Status Through
- Search Cross Reference

3. Access the detail area.



4. Complete the following optional fields:

- Freeze Code Designation
- Type of Flash Message

Field	Explanation
Thru	<p>Enter a status code (00/SS) that you want the system to use as a beginning point for selecting work order information.</p> <p>There are three ways to enter the status code information:</p> <ul style="list-style-type: none"> ▪ Enter a range of statuses by entering codes in both the From and Thru fields. ▪ Enter only a From code to view work orders beginning with a particular status. For example, 10 Thru displays all work orders with a status of 10 or more. ▪ Enter only a Thru code to view work orders ending with a particular status. For example, Thru 40 displays all work orders with a status of 40 or less.
WO Flash Msg	<p>A user defined code (system 00, type WM) that indicates a change in the status of a work order. The system indicates a changed work order with an asterisk (*) in the appropriate report or inquiry form field. The flash message is highlighted in the Description field of the work order.</p>

Revising Work Order Information



From Shop Floor Control (G31), choose **Discrete Daily Order Preparation**
 From Daily Order Preparation - Discrete (G3111), choose **Shop Floor Workbench**

After you review work order information, you might need to revise some of the information.

To revise work order information

On Shop Floor Workbench

1. Complete the following optional fields:
 - Status
 - Work Order/ECO Type
 - Work Order Priority
2. Access the detail area.
3. Complete the following optional fields:
 - Freeze Code Designation
 - Type of Flash Message

You can use the selection exit to access the work order and make any additional changes.

Processing Options

See [Shop Floor Workbench \(P31225\)](#).

Printing Scheduling Information for Work Centers

	From Shop Floor Control (G31), choose Discrete Periodic Functions From Periodic Functions - Discrete (G3121), choose Dispatch List
---	---

Use Dispatch List to plan and execute the production in a work center. The Dispatch List DREAM Writer report includes the work center scheduling information that appears on the Dispatch List Inquiry form.

Work Unit	Oper Seq#	Order Number	WO Ty	T St	Op Y St	Related Order	Start Date	Request Date	Remaining Machine	Remaining Labor	Remaining Setup	Quantity Remaining	UM
31435													
JD Edwards World Schedule by Work Center													
											Page - 1		
											Date - 14/03/18		
MACH	2,00	164048	WM 99	Z			27/02/15	27/02/15		10,00		10	
MACH	2,00	164056	WM 99	Z			27/02/15	27/02/15		10,00		10	
MACH	2,00	164064	WM 98	6			27/02/15	27/02/15				0	
MACH	2,00	164072	WM 98	6			27/02/15	27/02/15				0	
MACH	2,00	164208	WM 40	6			27/02/15	27/02/15	10,00			1	
Requested.									10,00	20,00			
MACH	2,00	16461	WM 98	6			28/02/15	28/02/15	10,00			1	
Requested.									10,00				
MACH	2,00	164081	WM 30	6			02/03/15	02/03/15	10,00			1	EA
MACH	2,00	16492	WM 98	6			02/03/15	02/03/15	10,00			1	
MACH	2,00	16493	WM 30	6			02/03/15	02/03/15	10,00			1	
Requested.									30,00				
MACH	2,00	473	WM 30	6			07/03/15	07/03/15	10,00			1	
MACH	2,00	474	WM 30	6			07/03/15	07/03/15	10,00			1	
MACH	2,00	475	WM 30	6			07/03/15	07/03/15	10,00			1	
Requested.									30,00				
MACH	2,00	164082	WO 10	5			03/04/15	03/04/15	10,00	5,00		1	EA
Requested.									10,00	5,00			
MACH	2,00	164136	WO 05	5			04/04/15	04/04/15	10,00	5,00		1	
Requested.									10,00	5,00			
MACH	2,00	16479	WO 30	6			04/05/15	04/05/15	10,00			1	EA
Requested.									10,00				

Work with Hours and Quantities

Working with Hours and Quantities

As you work to produce the items on a work request, you need to record the hours spent on the production and the number of items completed in that time. This allows you to monitor progress and actual costs and compare them against the standard hours and quantities you estimated for the job.

If your estimates are fairly accurate, you can have the system automatically enter the standard values for you at various points in the routing. Or, you can have all of your employees individually enter their time and quantities completed.

The Shop Floor Control system interfaces with the JD Edwards World Payroll system so that you only have to enter an employee's hours and quantities produced once. The single entry saves time and reduces the risk of data entry error, while ensuring that data across your systems is consistent.

The information is recorded in the Payroll system as well as against a work order in the Manufacturing system. The hours and quantities can be applied to a specific work order so you can maintain accurate manufacturing accounting and costing data. You can record hours and quantities per work order or per employee, to accommodate both piece-work and hourly rate employees.

The Shop Floor Control system manages hour and quantity information in the same manner whether you enter it on the Hours and Quantities form or the Payroll Time Entry form. If you want to interface with the Payroll system, you should use the Payroll Time Entry form to enter hours and quantities information.

After you enter hours and quantities, either manually or through payroll time entry, you can review and revise them before you process them to the Manufacturing system for further tracking and cost accounting. You can review the hours and quantities either online or using a report.

This section contains the following:

- [Where in the Process Do You Enter Hours and Quantities?](#)
- [Entering Hours and Quantities Manually](#)
- [Entering Hours and Quantities through Payroll Time Entry](#)
- [Updating Hours and Quantities](#)
- [Reviewing Hours and Quantities Transactions](#)

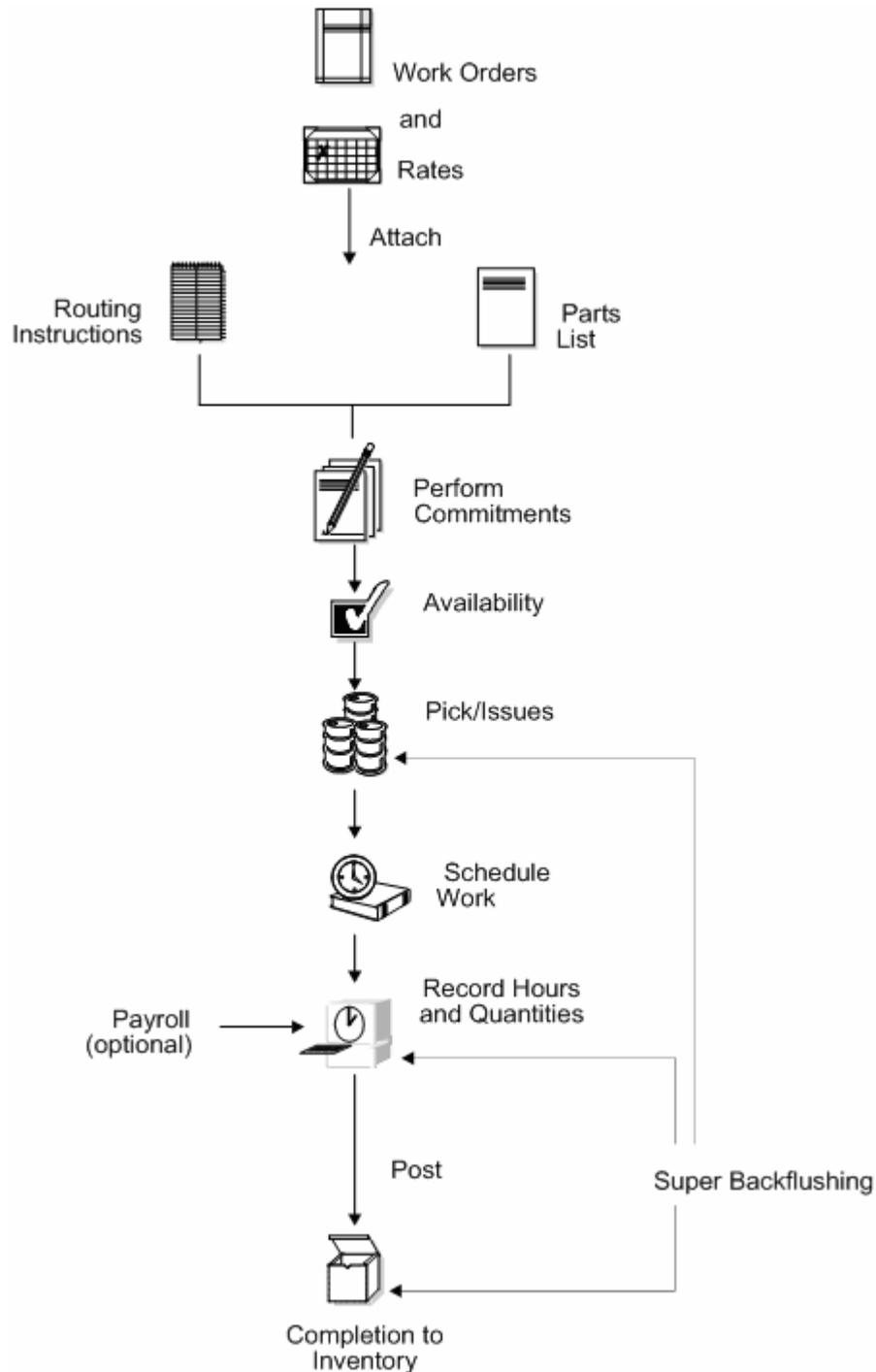
What You Should Know About

Changing the status	When you change the status of a routing operation, the change does not take effect until you run the Hours and Quantities Update to update the Shop Floor Control Routing Instructions table (F3112).
Resources	The header information comes from the Work Order Master table (F4801). The detail information is stored in the Work Order Time Transactions table (F31122).
Quality Management test results	<p>As you record actual hours and quantities to a work order, you can:</p> <ul style="list-style-type: none">▪ Access Test Results Entry for completed items that require testing.▪ Access generic text for the parent item.▪ Set processing options for default lot, work order and operation statuses. <p>See <i>Working with Test Results</i> in the <i>Quality Management Guide</i> for more information.</p>

See Also

- *About Work Orders in Accounting* in the *Product Costing and Manufacturing Accounting Guide*

Where in the Process Do You Enter Hours and Quantities?



Entering Hours and Quantities Manually



From Shop Floor Control (G31), choose **Discrete Daily Order Reporting**
 From Daily Order Reporting - Discrete (G3112), choose **Hours & Quantities Entry**

Use the Hours and Quantities program to charge actual hours and quantities to a work order. You can use the processing options to display the information in order number format or employee number format. Use these formats to record time and quantities for employees against work order routing steps or work order routing steps against employees.

Note the following important information about entering hours and quantities:

- Enter the quantity completed only once per operation sequence number. Entering it for each type of hours will cause a variance amount.
- Enter hours using beginning and ending times for each entry or the actual hours up to two decimal places.
- To reverse completed or scrapped quantities you have entered, enter the quantity you want to reverse as a negative quantity.

To enter hours and quantities manually

On Hours and Quantities - Order Number format

Employee	Op Number	Op Seq	H	Time Begin	Time Ending	Hours	Quantity	UN St	Emp. Name
6001	10					20	40		99
6001	10					2.5			
6001	20					16	40		99
6001	30					15.20	40		99
6001	30					7.25			
6001	40					7.2	40		99
6001	50					2	40		99

1. Complete the following fields:
 - Work Date
 - Shift
 - Order Number
 - Operation Sequence Number
 - Type of Hours
 - Hours

- Quantity
 - Unit of Measure
 - Status
2. Access the detail area.

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Values List
Scheduling Workbench
Exit to Name Search
On-Line Hours & Quantities
Production Status
Clear Screen

311221 Hours & Quantities Batch Number 3697
Work Date 04/26/17

Action Code
Order Number/Rate 121419 WD
Item Number 777 Potato Chip Process

Employee	Op Seq	H	Begin	Ending	Hours	Quantity	UM	St	Emp. Name
5001	10.00	1	00:00:00	00:00:00	20.00				Allen, Ray
Misc. Dollars					Employee Rate	7.72	Equipment Rate		
Reason Code			Shift	Explanation	Potato Chip Process				
5001	10.00	1	00:00:00	00:00:00	2.50				Allen, Ray
Misc. Dollars					Employee Rate	7.72	Equipment Rate		
Reason Code			Shift	Explanation	Potato Chip Process				
5001	10.00	4	00:00:00	00:00:00		40	02		Allen, Ray
Misc. Dollars					Employee Rate		Equipment Rate		
Reason Code			Shift	Explanation	Potato Chip Process				
5001	20.00	1	00:00:00	00:00:00	16.00				Allen, Ray
Misc. Dollars					Employee Rate	7.72	Equipment Rate		
Reason Code			Shift	Explanation	Potato Chip Process				

F4=Fold F5=Sch WB F9=Name Search F10=Hrs & Qty Update F24=More Keys

3. Complete the following optional fields:

- Miscellaneous Dollars
- Employee Rate
- Equipment Rate
- Reason Code
- Explanation

Field	Explanation
Work Date	A date that identifies the financial period to which the transaction is to be posted. The general accounting constants specify the date range for each financial period. You can have up to 14 periods. Generally, period 14 is for audit adjustments. The system edits this field for PBCO (posted before cutoff), PYEB (prior year ending balance), and so on.

Field	Explanation
Op Seq	<p>In routings, this number is used to sequence the fabrication or assembly steps in the manufacture of an item. You can track costs and charge time by operation.</p> <p>In bills of material, this number designates the routing step in the fabrication or assembly process that requires a specified component part. You define the operation sequence after you create the routing for the item. The Shop Floor Control system uses this field in the backflush/preflush by operation process.</p> <p>In engineering change orders, this number is used to sequence the assembly steps for the engineering change.</p> <p>Skip To fields allow you to enter an operation sequence that you want to begin the display of information.</p> <p>You can use decimals to add steps between existing steps. For example, use 12.5 to add a step between steps 12 and 13.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>This is the sequence number of the routing step on the work order. You must enter this number.</p>
T H	<p>A code to indicate the type of time entered. Valid codes are:</p> <ul style="list-style-type: none"> 1 Run Labor Hours 2 Setup Labor Hours 3 Machine Hours 4 Quantities Completed 5 Quantities Scrapped 9 Miscellaneous (piece rate bonus and so forth)
Hours	<p>The number of hours associated with each transaction.</p>
Misc. Dollars	<p>The actual gross pay amount for an employee. This is to be distinguished from the distributed gross pay amount used for labor distribution. See data item DPAY.</p> <p>When using Work Order Time Entry, use this field to record miscellaneous pay for an employee, such as piece rate bonus.</p> <p>The employee's insurable gross pay for the listed pay period.</p>

Field	Explanation
Equipment Rate	<p>A code that represents the amount you want to charge the job. Each piece of equipment can have numerous billing rates based on the rate code. The equipment billing rate can be composed of up to ten different rates. For example:</p> <p>Billing Rate = 200</p> <p>100 Rate 1 (Ownership Component)</p> <p>25 Rate 2 (Operating Component)</p> <p>50 Rate 3 (Maintenance Component)</p> <p>25 Rate 4 (Other Costs Component)</p> <p>When you post time entries to the General Accounting system, the system recognizes credits in revenue accounts for each of the rate components. This allows you to separate portions of the equipment billing by type of cost.</p> <p>Note: You are not required to use rate components.</p>
Explanation	A name or remark that describes an element in the JD Edwards World systems.

Processing Options

See [Work Order Time Entry \(P311221\)](#).

Entering Hours and Quantities through Payroll Time Entry

	<p>From Shop Floor Control (G31), choose Discrete Daily Order Reporting</p> <p>From Daily Order Reporting - Discrete (G3112), choose Payroll Time Entry</p>
---	---

The manufacturing interface to the Payroll Time Entry form lets you enter payroll information plus additional information that appears on the Hours and Quantities form. On the Payroll Time Entry form, you can:

- Designate hours as setup, labor, or machine related, and record them against a specific routing operation for the process
- Record the quantity of pieces completed and scrapped by the employee against a specific routing operation for the process
- Update the status of a routing operation for a process
- Access the Hours and Quantities form

You can use processing options to enter:

- A work order status code beyond which entries to the work order cannot be made
- The document type associated with shop floor activity
- The version of the Hours and Quantities form to access

The system concurrently enters the entries you make on the Payroll Time Entry form on the Hours and Quantities form. After you have entered the data into the Payroll system, you can process it.

For example, referring to the form below, the following entries have been made against work order number 1170, routing operation 10.0, by employee number 6001:

- 1.5 hours of setup time
- 4 hours of labor time
- 3 hours of machine time
- 125 pieces of product completed
- An operation status change to 35, Waiting for Inspection, for operation 10.0

Before You Begin

- Verify that your JD Edwards World Payroll system is set up and running

What You Should Know About

Processing hours and quantities

To process the information into the Manufacturing system, you must run the Hours and Quantities Update. This updates the Shop Floor Control Routing Instructions table (F3112) and supplies the manufacturing accounting programs with the current data. After you run this program, you will not be able to locate the data on Hours and Quantities. Before the data is updated, you can locate it and change it on either entry form, as necessary.

Updating Hours and Quantities

To process the hours and quantities into the Manufacturing system, you must run the Hours and Quantities Update batch program. This updates the Shop Floor Control Routing Instructions table (F3112) and supplies the manufacturing accounting programs with the current data. After you run this program, you cannot locate the data on the Hours and Quantities form. Before the data is updated, you can locate it and change it as necessary.

You can process hours and quantities transactions in the Manufacturing system by:

- Running the Hours and Quantities Update batch program from the menu
- Selecting the online update from the Hours and Quantities form

The method of processing you use depends on how you enter the transaction data:

- If you use Super Backflush to enter hours and quantities, the quantities transactions are processed real time. However, you must run the Hours and Quantities Update to process the hours. Super Backflush enters the transactions for you at the point in the routing that you specify and it also has a processing option to automatically run the update.
- If you enter the data on the Payroll Time Entry form, or run Super Backflush, you must either run the update program or locate the data on the Hours and Quantities form, and then use the online update selection.
- If you enter the transaction data on the Hours and Quantities form, you can use the menu selection or the online update selection to run the update.

Complete the following tasks:

- Update hours and quantities manually
- Update hours and quantities by batch

Before You Begin

- Enter the hours and quantities transaction data

To update hours and quantities manually

	From Shop Floor Management (G31), choose Daily Order Reporting - Discrete From Daily Order Reporting - Discrete (G3112), choose Hours & Quantities Entry
---	---

On Hours and Quantities

Employee	Op Seq	H	T	Time Begin	Time Ending	Hours	Quantity	UM	St	Emp. Name
5001	10.00	1	00	00:00:00	00:00:00	20.00				Allen, Rau
5001	10.00	1	00	00:00:00	00:00:00	2.50				Allen, Rau
5001	10.00	4	00	00:00:00	00:00:00		40		02	Allen, Rau
5001	20.00	1	00	00:00:00	00:00:00	16.00				Allen, Rau
5001	20.00	4	00	00:00:00	00:00:00		40		02	Allen, Rau
5001	30.00	1	00	00:00:00	00:00:00	15.20				Allen, Rau
5001	30.00	1	00	00:00:00	00:00:00	.25				Allen, Rau
5001	30.00	4	00	00:00:00	00:00:00		40		02	Allen, Rau
5001	40.00	1	00	00:00:00	00:00:00	7.20				Allen, Rau
5001	40.00	4	00	00:00:00	00:00:00		40		02	Allen, Rau
5001	50.00	1	00	00:00:00	00:00:00	2.00				Allen, Rau
5001	50.00	4	00	00:00:00	00:00:00		40		02	Allen, Rau

Complete the following field:

- Order Number/Employee Number

The system only processes the records that are in the current entry session. Therefore, if you exited the form after you entered the transaction data or entered it on the Payroll Time Entry form, you must locate the data on the Hours and Quantities form, and change the records to make them current to the system.

The update takes the hours and quantities recorded against work order operations and updates them to their matching fields in the Shop Floor Control Routing Instructions table (F3112). After the update, the form clears and the records that were processed no longer appear. The system enters a P in the Processed Code field for each entry it updates so that the record cannot be updated again.

To update hours and quantities by batch



From Shop Floor Management (G31), choose **Daily Order Reporting - Discrete**
From Daily Order Reporting - Discrete (G3112), choose **Hours & Quantities Update**

You should only update those records that have not yet been processed. Records that have not been processed have a blank Processed Code field. Run the DREAM Writer version to process the transactions.

Reviewing Hours and Quantities Transactions

After you enter hours and quantities, either manually or through payroll time entry, you can review and revise them before you process them to the Manufacturing

system for further tracking and cost accounting. You can review the hours and quantities either online or using a report.

Complete the following tasks:

- Review the status of hours, quantities, and operation quantities
- Review the hours and quantities report

Reviewing the Status of Hours, Quantities, and Operation Quantities



From Shop Floor Management (G31), choose **Daily Order Reporting - Discrete**
From Daily Order Reporting - Discrete (G3112), choose **Production Status**

The Production Status program allows you to review the status of all work orders by work center, item number, or order number within status and date ranges. This program displays historical and work remaining information.

To review the status of hours, quantities, and operation quantities

On Production Status

Op	Item Number	Order No	Ty	St	Start Date	Req Date	Qty Remaining	UM
	333	113470	WO		09/28/06	10/09/17	11	EA
	4133	113470	WO		12/29/14	01/02/15	0	EA
	3999	113515	WO		12/29/14	01/02/15	0	EA
	3980	113558	WO		12/29/14	01/02/15	0	EA
	3981	113991	WO		12/29/14	01/02/15	0	EA
	3982	113718	WO		12/29/14	01/02/15	0	EA
	443	112361	WO		01/05/15	01/09/15	0	EA
	3981	113683	WO		03/22/15	03/30/15	0	EA
	3980	113556	WO		03/23/15	03/30/15	0	EA
	3982	113726	WO		03/23/15	03/30/15	0	EA
	4133	113486	WO		03/26/15	03/30/15	0	EA
	3999	113523	WO		03/27/15	03/30/15	0	EA

1. Complete the following fields:
 - Work Center/Line
 - Item Number
 - Branch Plant
2. Complete the following optional fields:
 - Order Number

- Status
 - Date Range
3. Access the detail area.

Op	Start Date	Req Date	Qty Remaining	UN
0				
333	09/28/06	10/09/17	11	EA

Item Number	Order No	Ty	St	Op	Start Date	Req Date	Qty Remaining	UN
333	389765	WO			09/28/06	10/09/17	11	EA

Qty at Op	Work Center	Op Seq.	10.00	WO/Rate	Sta.	10	Yield.	Tool	Crew	1.0
	200-203									

	Quantities		Hours			
	Completed	Scrapped	Machine	Labor	Setup	Resource
STD	11			5.10	50	
ACT						
VWR	11			5.10	50	
REM				5.10	50	

F5=Order Completion 1=Production History 2=Line Dispatch List F24=More

Reviewing the Hours and Quantities Report



From Shop Floor Management (G31), choose **Daily Order Reporting - Discrete**
 From Daily Order Reporting - Discrete (G3112), choose **Hours & Quantities Proof**

The Hours and Quantities Proof report lists all labor hours and completed quantities recorded against a work order. You can total the hours and quantities in various ways, such as by employee, work order, item, operation, and so forth.

Using the Hours and Quantities Proof, you can print the hours and quantities transactions that have been entered and review them before you process them to the system. Before they are processed, the transactions can be changed and updated. After you process them, they cannot be changed.

31322		JD Edwards World Hours & Quantities Journal							Page	-	2		
									Date	-	03/16/18		
W.O. Number	Ty	W.O. Description	Employee Number	Employee Name	Op Seq	Work Date	T H	Hourly Rate	Machine	Hours Labor	Setup	Quantity Completed	UM
90000080					10.00		1			19.349,60			
					10.00		2				114,00		
					10.00		4					96748	
					20.00		1			19.349,60			
					20.00		4					96748	
					30.00		1			7.739,84			
					30.00		3		4.837,40				
					30.00		4					96748	
				Order Number					4.837,40	46.439,04	114,00		
90000081					10.00		1			509,20			
					10.00		2				3,00		
					10.00		4					2546	
					20.00		1			509,20			
					20.00		4					2546	
					30.00		1			203,68			
					30.00		3		127,30				
					30.00		4					2546	
				Order Number					127,30	1.222,08	3,00		
90000082					10.00		1			509,20			
					10.00		2				3,00		
					10.00		4					2546	
					20.00		1			509,20			
					20.00		4					2546	
					30.00		1			203,68			
					30.00		3		127,30				
					30.00		4					2546	
				Order Number					127,30	1.222,08	3,00		
90000090					10.00		1			26.998,40			
					10.00		2				156,00		
					10.00		4					134992	
					20.00		1			26.998,40			
					20.00		4					134992	
					30.00		1			10.799,36			
					30.00		3		6.749,60				
					30.00		4					134992	
				Order Number					6.749,60	64.796,16	156,00		
									11.841,60	113.679,36	276,00		
852 WO Unit 2			6001 Allen, Ray		40.00	06/15/18	1	7.72		12,00			EA
				Order Number						12,00			
2057 WO OAK SHELF UNIT					25.00	12/30/18	4					100	EA
				Order Number									

Processing Options

See [Production Status \(P31226\)](#).

Complete Work Orders

Completing Work Orders

When you finish production of items on the shop floor, you need to record the completions to inventory in the system. The completion transactions that you enter in the Shop Floor Control system update the item quantity records in the Inventory Management system.

You use the Super Backflush and Completion programs to record completions. Use these programs to perform one of two functions:

- Report all items as complete when the entire work order is finished
- Report partial completions as they occur throughout the production process

When you choose to report completions depends on your production cycle time. Depending on the nature of the manufactured item, you can report partial completions or report total completions in one transaction. Reporting partial completions also can indicate the stage or progress that is being made on an order in production, and identify any delays in the production process.

When you use the Completions program to complete more than the quantity ordered, the system highlights the Completed Quantity field and warns you that completing the quantity you designated will generate an overcompletion.

If a previous completion exists for a work order, the system displays information in the lot, grade or potency, and status fields. Also, if you enter a quantity, the system adds inventory to the lot at the grade or potency and the current status.

This section contains the following:

- [Completing a Work Order without Backflushing](#)
- [Completing a Work Order through Backflush](#)
- [Completing Partial Quantities on Work Orders](#)
- [Processing Work Orders through Super Backflush](#)
- [Processing Work Orders Using Quantity at Operation](#)
- [Completing a Work Order with Serialized Components](#)
- [Lot Status Processing at Work Order Completion](#)

What You Should Know About

Blending, filling, and packaging

When you complete a work order to a blending, holding, or storage tank, the system checks the tank capacity and displays an error if the completion would exceed the tank's capacity.

When you complete inventory the system allows you to access the Dip Volume Calculator/Meter Readings program to enter readings.

Work order completions allow you to enter ambient quantities and current temperature and/or density information. The system calculates and stores the standard quantity and weight accordingly.

See *Bulk Stock Management Guide*.

Quality Management test results

As you enter work order completions, including quantity completed and quantity scrapped, you can:

- Access Test Results Entry for any items requiring testing upon completion.
- Review work order generic text.
- Set processing options for default lot, work order, and operation statuses.

As you backflush labor and material for a work order, you can:

- Access Test Results Entry for any items that require testing.
- Review generic text for the parent item and operations.

See *Working with Test Results* in the *Quality Management Guide* for more information.

Warehouse Management system interface

If you process transactions for a branch/plant that uses warehouse control, the Location Detail window appears when you enter backflush transactions, and a second location detail information record is created. In this case, you select Location Detail Information records for processing. To ensure that the quantities in the Location Detail Information table (F4602) are consistent, you should make a selection from the window.

The original quantity being processed through this transaction program, using the Location Detail window, displays in the top of the Super Backflush window.

If the item being processed has a unit of measure structure or storage containers, the system enters them in the detail area of the Location Detail window. Although you can override these values, the system performs the following edits:

- The primary unit of measure in the structure and the last level specified are valid based upon unit of measure conversions in Item Master.
- The units of measure display from largest to smallest.
- The structure must result in whole number conversions between units of measure.
- Each unit of measure can only contain one partial quantity for that unit of measure.
- You can only overfill pallet type units of measure as defined in the Unit of Measure Definition by Item or by Item Group.

The system always displays this window when adding inventory to the branch/plant, except in the following case:

- Removal of inventory and only one location detail record is in the location. The removal is automatically performed to the single location detail.

Receipt Routing

When using Receipt Routing at Work Order Completions activate processing option 15 on Work Order Completion (P31114).

See Also

- *Understanding Lot Processing*
- *Quality Management Guide*

Completing a Work Order without Backflushing

From Shop Floor Control (G31), choose **Discrete Daily Order Reporting**
From Daily Order Reporting - Discrete (G3112), choose **Partial Completions**

Use the Partial or Full Completion program to record completions without backflushing the materials.

To complete a work order without backflushing

On Partial Completion

31114 Partial Completions

Tools: Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Lot/SN Associations
Location Search Window
Scheduling Workbench
Shortage Workbench - I
Shortage Workbench - J
Work Order Entry
Create / View Lot/SN Mt
Multi Location Search V
Co-/By-Products Compl
Test Results
Clear Screen

31114 Partial Completions Branch/Plant M30
Requested 09/09/17

Action Code C
Order Number 389976 W0 Oak Desk With Chair
Item Number 5128 Oak Desk With Chair
Quantity Ordered 100 EA
Quantity Completed 73
Quantity Scrapped 15
Current Status Code 45

Description	Quantities		Date	% of
	Completed	Scrapped		
Completed Items to Stock	73	15	03/05/07	45 73.000

Memo Lot 1
Memo Lot 2

Location Reason Code Lot/SN
Shift Lot/SN Status
Lot/SN Grade

F16=Multi Location Search F18=Scheduling Workbench F24=More Keys

1. Complete the following fields:

- Order Number
- Quantity Complete
- Quantity Scrapped
- Date Complete
- Status
- Lot Status (optional)
- Memo Lot 1 (optional)
- Memo Lot 2 (optional)
- Reason Code (optional)
- Shift (optional)

2. Complete the following fields if you are completing to a location other than the primary location:

- Location
- Lot
- Lot/SN Potency or Lot/SN Grade (if defined for the item)

Field	Explanation
Unit of Measure	<p>A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>If you leave this field blank, the system uses the unit of measure from the Work Order Header table and updates the quantities in the Item Location table in primary units of measure. If this value is not the primary unit of measure, the system converts it to the primary unit of measure.</p>

Processing Options

See [Work Order Inventory Completion \(P31114\)](#).

Completing a Work Order through Backflush

Use the Completion with Backflush program to record full or partial completions while backflushing the materials. Running this program completes the quantity to stock.

Completing a work order through backflush consists of:

- Completing a work order
- Releasing sales backorders during completions (optional)
- Managing completions using receipts routing (optional)

Before You Begin

- Set the appropriate processing options to access the Inventory Issues program and to identify the version to use
- Before you release backorders during completion, set processing options to enable backordered sales orders to appear and to identify the version of the Backorder Release program to use
- Before you can manage completions using Receipts Routing, set a processing option to initiate the receipt routing process

To complete a work order



From Shop Floor Management (G31), choose **Daily Order Reporting - Discrete (G3112)**
 From Daily Order Reporting - Discrete (G3112), choose **Completion with Backflush**

On Completion with Backflush

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Lot/SN Associations
Location Search Window
Scheduling Workbench
Shortage Workbench - I
Shortage Workbench - V
Work Order Entry
Create / View Lot/SN Mts
Multi Location Search W
Co-By-Products Compl
Test Results
Clear Screen

31114 Completion with Backflush Branch/Plant M30
Requested 09/06/17

Action Code C
Order Number 309976 W0 Oak Desk With Chair
Item Number 9128 Oak Desk With Chair
Quantity Ordered 100 ER
Quantity Completed 73
Quantity Scrapped 15
Current Status Code 45

Description	Quantities		Date	% of
	Completed	Scrapped		
Completed Items to Stock	5	5	EH 09/06/17	45 73.000

Branch/Plt M30 Locn Lot/SN
Memo Lot 1 Reason Code Lot/SN Status
Memo Lot 2 Shift Lot/SN Grade

F16=Multi Location Search F10=Scheduling Workbench F24=More Keys

1. Complete the following fields:
 - Order Number
 - Quantity Complete
 - Quantity Scrapped
 - Date Complete
 - Status
 - Lot Status (optional)
 - Memo Lot 1 (optional)
 - Memo Lot 2 (optional)
 - Reason Code (optional)
 - Shift (optional)
2. Complete the following fields if you are completing to a location other than the primary location:
 - Location
 - Lot
 - Lot/SN Potency or Lot/SN Grade (if defined for the item)

The Work Order Inventory Issues form appears.

Item	Op Seq	St	Qty Ordered	Qty Issued	Issues	UM
4277	10.00		100	63	10	EA
4133	20.00		400	252	40	EA
3999	20.00		100	63	10	EA
3801	30.00		500	441	59	EA
3980	30.00		100	63	10	EA
3981	30.00		20	20		EA
3902	30.00		200	126	20	EA
3881	30.00		200		11	EA
3981	30.00		200	200		EA
3901	30.00		100	32	40	EA
4218	40.00		100	63	10	EA
2111	50.00		60	60		EA

- On Work Order Inventory Issues, issue the material by accepting the records displayed.

Field	Explanation
UM	A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on. <i>Form-specific information</i> If you leave this field blank, the system uses the value from the Parts List table and updates the quantities in the Item Location table in the primary unit of measure.

To release sales backorders during completions

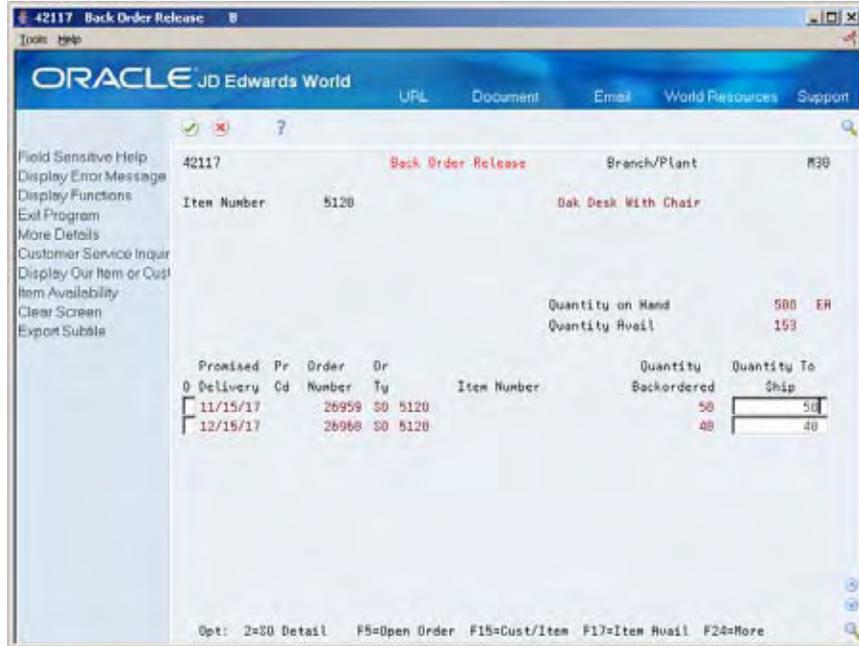
	From Shop Floor Management (G31), choose Daily Order Reporting - Discrete (G3112) From Daily Order Reporting - Discrete (G3112), choose Completion with Backflush
--	--

The JD Edwards World Sales Order Management system identifies items that are being manufactured as backordered items. When you complete the items in the Shop Floor Control system using the Completions program, you can release the sales order backorders.

On Completion with Backflush

- Complete the work order by accepting the records displayed.

The Back Order Release form appears.



2. On Back Order Release, review the following default information:

- Order Number
- Order Type
- Item Number
- Quantity Backordered
- Quantity To Ship

If the available quantity plus the amount being received is enough to fill any or all of the backorders, the system enters the amount for that order in the Quantity to Ship field on the Back Order Release form.

Field	Explanation
Quantity Backordered	The number of units backordered in Sales Order Management or in Work Order Processing, using either the entered or the primary unit of measure defined for this item.

Complete the following fields:

- Normal Route
- Effective From
- Effective Through

What You Should Know About

Issuing material from locations not listed on the parts list

After you complete the work order by accepting the records shown on Completion with Backflush, do the following:

- Access Multiple Locations
- Move commitments
- Issue the material

Locating the status of the receipts routing

Use Status Inquiry to locate the status of the receipts routing. You can access Operation Movement Detail to view the details of a step. You can set a processing option in the Completions program to initiate receipts routing.

See Also

- *Reviewing Manufacturing AAIs (P40901) in the Product Costing and Manufacturing Accounting Guide*
- *Entering Receipts in the Procurement Guide*

Processing Options

See [Back Order Release \(P42117\)](#).

Completing Partial Quantities on Work Orders

	From Shop Floor Control (G31), choose Discrete Daily Order Reporting From Daily Order Reporting - Discrete (G3112), choose Partial Completion
---	--

You can use the Completion program to record completed quantities for a work order in one of two ways:

- Full completion allows you to complete all quantities for all materials on a work order.
- Partial completion allows you to complete parts of the quantity ordered for a work order.

The form displays completed and scrapped quantities and percent complete information for a work order.

Complete the following tasks:

- Complete partial quantities on a work order

- Complete a work order for multiple locations (optional)

To complete partial quantities on work orders

On Partial Completion

31114 Partial Completions

ORACLE JD Edwards World

Field Sensitive Help 31114 Partial Completions Branch/Plant R30
 Display Error Message
 Display Functions Requested 01/16/17
 Exit Program
 More Details
 Lot/SN Associations
 Location Search Window
 Scheduling Workbench
 Shortage Workbench - I
 Shortage Workbench - A
 Work Order Entry
 Create / View Lot/SN Mt
 Multi Location Search W
 Co-By-Products Compl
 Test Results
 Clear Screen

Action Code C
 Order Number 390205 WO Oak Desk With Chair
 Item Number 5128 Oak Desk With Chair
 Quantity Ordered 50 EA
 Quantity Completed 10
 Quantity Scrapped
 Current Status Code 10

Description	Quantities		Date	% of
	Completed	Scrapped		
Completed Items to Stock	10		EA 03/05/07	10 20.000

Branch/Plt R30
 Memo Lot 1
 Memo Lot 2
 Reason Code
 Shift
 Lot/SN Status
 Lot/SN Grade

F16-Multi Location Search F19-Scheduling Workbench F24-More Keys

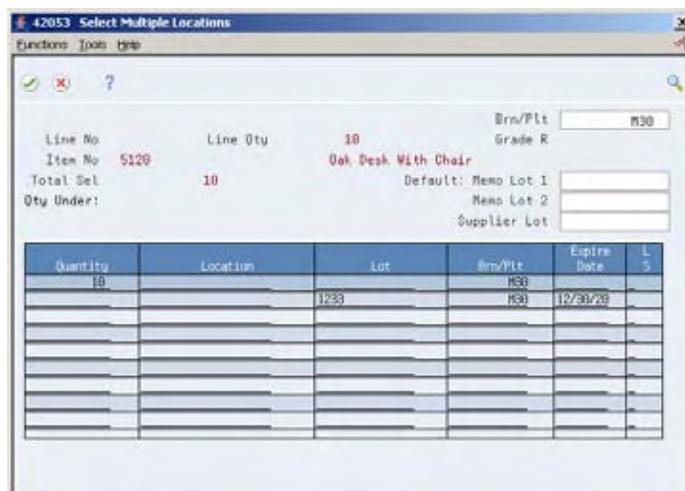
1. Complete the following fields:
 - Order Number
 - Completed Quantities
 - Scrapped Quantities
2. Complete the following optional fields:
 - Date Complete
 - Memo Lot 1
 - Memo Lot 2
 - Reason Code
 - Shift
3. Complete the following field if you did not set it in the processing options:
 - Status
4. Complete the following fields if you are not completing to the primary location:
 - Location
 - Lot
 - Lot Status
 - Lot/SN Potency or Lot/SN Grade (if defined for the item)

To complete a work order for multiple locations

On Partial Completion

1. Complete the following fields:
 - Order Number
 - Completed Quantities
 - Scrapped Quantities
2. Complete the following optional fields:
 - Date Complete
 - Memo Lot 1
 - Memo Lot 2
 - Reason Code
 - Shift
3. Complete the following field if you did not set it in the processing options:
 - Status
4. Complete the following fields if you're not completing to the primary location:
 - Location
 - Lot
 - Lot Status
 - Lot/SN Potency or Lot/SN Grade (if defined for the item)
5. Choose Select Multiple Locations.

Note: In order to access this window, a Completed Quantity must be entered on the completions form.



6. On Select Multiple Locations, complete the following fields:
 - Quantity Completed
 - Location
 - Lot
7. Review the following default information:
 - Branch/Plant

What You Should Know About

Completing a full work order

Use the Full Completion menu selection to complete all quantities for all materials on a work order.

Displaying the Lot expiration date

On the Work Order Completions program (P31114) there is a processing option (27) that can be set on so that the Lot expiration date is displayed.

Processing Work Orders through Super Backflush



From Shop Floor Control (G31), choose **Discrete Daily Order Reporting**
From Daily Order Reporting - Discrete (G3112), choose **Super Backflush**

Super Backflush is a DREAM Writer batch program that creates backflush transactions against a work order or rate schedule at pay points defined in the routing. Super backflushing allows you to relieve inventory at strategic points throughout the manufacturing process.

For example, you manufacture bicycles. Not all parts are required at the first operation. As component material is brought into the production process, it is relieved from inventory at points within this process. In this example, the cycle time might be three days.

Rather than relieving all parts for the work order or rate schedule at the start date, you can define more logical points within the production process to relieve the inventory as you use it. You can define operations in the parent item's routing at which various components are needed and at which operation you want the system to record the inventory transaction.

You can enter completed and scrapped quantities by operation and employee. The system automatically completes the work order, or you can review and revise the transactions. The backflush procedure can perform the following transactions by operation:

- Issue parts to the work order or rate schedule
- Record hours and quantities against the work order or rate schedule at standard values
- Record inventory completions

The system records the transactions from the pay point you indicate in the routing back to the first operation or the previous pay point, if one has been defined.

You can set processing options for the Super Backflush program to:

- Indicate the versions of associated programs to access
- Select document types to be used when creating transactions
- Select update status codes for operations and the work order or rate schedule header
- Indicate a status code beyond which entries to work orders or rate schedules cannot be made
- Store hours and quantities in related tables for review.
- Update hours and quantities for later processing by manufacturing accounting
- Either access a specified version of the following programs or automatically execute the process without the form displaying:
 - Hours and Quantity
 - Material Issues
 - Work Order Completions

To process a work order through super backflush

On Super Backflush

Work Center	Op Seq	Description	Employee	Qty Comp.	Qty Scrap	UM	St
200-204	10.00	Assemble frame	6001			EA	
200-204	20.00	Assemble sides/bac	6001	10		EA	
200-204	30.00	Attach drawer slid	6001			EA	
200-204	40.00	Attach top	6001	10		EA	
200-202	50.00	Finish	6001			EA	
200-204	60.00	Package with chair	6001	10		EA	

1. Complete the following fields:

- Order Number
- Transaction Date

- Shift
- Employee
- Quantity Complete
- Status

2. Access the detail area.

Work Center	Op Seq	Description	Employee	Qty Comp.	Qty Scrap	LN St
200-204	10.00	Assemble frame	6001			ER
				C Standard Quantity	40	ER
				Qty at Operation	26	
				Total Completed	4	
				Total Scrapped		
200-204	20.00	Assemble sides/bac	6001	10		ER
				C Standard Quantity	40	ER
				Qty at Operation		
				Total Completed	4	
				Total Scrapped		
200-204	30.00	Attach drawer slid	6001			ER
				C Standard Quantity	40	ER
				Qty at Operation	1	
				Total Completed	2	
				Total Scrapped		

3. Complete the following optional field:

- Pay Point Status

The Work Order Inventory Issues form appears.

31113 Work Order Inventory Issues

Oracle JD Edwards World

Field Sensitive Help
Display Error Message
Display Functions
Shortage Revisions
Exit Program
More Details
Inventory Issues Inquiry
Work Order Header
Retrieve Work Order Lo
Clear Screen

31113 Work Order Inventory Issues Branch/Plant #390
Node 1 Extended

Action Code
Order Number 390379 W0 Oak Desk With Chair
Item Number 5120 Oak Desk With Chair
Quantity Ordered 48 EA Co/By
Issue Material for 10 EA Skip to Op Seq
Order Date 03/06/07 Skip to Req'd

Op Seq	Item	Op Seq	St	Qty Ordered	Qty Issued	Issues	UR
1	4277	10.00		40	5	10	EA
1	4133	20.00		160	20	40	EA
1	3999	20.00		40	5	10	EA
1	3801	30.00		200	20	70	EA
1	3980	30.00		40	4	10	EA
1	3981	30.00		160	16	40	EA
1	3902	30.00		00	0	20	EA
1	4210	40.00		40	4	10	EA

Opt: 1=Process Issue 4=Multi-Location F5=Item Ledger F24=More Keys

On Work Order Inventory Issues, the system automatically provides values in the following fields:

- Status
 - Issues
 - Unit of Measure
 - Branch/Plant
 - Location
4. Process all transaction forms and the system processes the information according to the issue type code and pay point type assigned to each operation.

If an operation is defined as a pay point, and the pay point is set up to issue material and report labor, when the operation is recorded as complete, the system issues the ingredients and backflushes labor from the last defined pay point up to the previous pay point.

The W.O. Time Entry form appears.

311221 W.O Time Entry

ORACLE JD Edwards World

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Values List
Scheduling Workbench
Exit to Name Search
On-Line Hours & Quant
Production Status
Clear Screen

311221 W.O Time Entry Batch Number 3778
Work Date 03/06/07

Action Code
Order Number/Rate 390379 WO
Item Number 5128 Oak Desk With Chair

Employee	Op Seq	Type of Hours	Time Begin	Time Ending	Hours	Quantity	Unit	Status	Emp. Name
8881	10.00	1	00:00:00	00:00:00	1.00				Allen, Ray
8881	10.00	1	00:00:00	00:00:00	5.00				Allen, Ray
8881	10.00	4	00:00:00	00:00:00					Allen, Ray
8881	16.00	4	00:00:00	00:00:00			2	EA	Allen, Ray
8881	20.00	1	00:00:00	00:00:00	.00				Allen, Ray
8881	20.00	1	00:00:00	00:00:00	4.00				Allen, Ray
8881	20.00	4	00:00:00	00:00:00			2	EA	Allen, Ray
8881	20.00	4	00:00:00	00:00:00			10	EA	Allen, Ray
8881	30.00	1	00:00:00	00:00:00	.75				Allen, Ray
8881	30.00	1	00:00:00	00:00:00	3.00				Allen, Ray
8881	30.00	4	00:00:00	00:00:00			2	EA	Allen, Ray
8881	30.00	4	00:00:00	00:00:00			10	EA	Allen, Ray

F4=Fold F5=Sch WB F9=Name Search F10=Hrs & Qty Update F24=More Keys

5. On W.O. Time Entry, review the following fields:

- Employee Number
- Operation Sequence Number
- Type of Hours
- Beginning Hours
- Ending Hours
- Hours
- Quantity
- Unit of Measure
- Status
- Employee Name

The Work Order Completion form appears.

6. On Work Order Completion, accept the transaction.

Field	Explanation
Pay Point Status	<p>A code that indicates whether the operation should be taken to complete or partially complete status. Valid codes are:</p> <p>Blank Not reported</p> <p>P Partially complete</p> <p>C Completed</p>
UM	<p>A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.</p> <p><i>Form-specific information</i></p> <p>If you leave this field blank, the system uses the value from the Parts List table and updates the quantities in the Item Location table in the primary unit of measure.</p>

What You Should Know About

Resources	The information in the detail area of the form is from the Shop Floor Control Routing Instructions table (F3112). The information in the header is from the Work Order Master table (F4801).
Operation numbers	Operation numbers defined as pay points appear in reverse image on the form.

Blending, filling, and packaging

When you use the Super Backflush program with bulk products the system:

- Updates the previous product on the Work Center Master
- Updates the current or previous product on the Tank Master
- Writes a bulk item ledger record along with the Item Cardex.

See *Bulk Stock Management*.

Running Super Backflush from the Shop Floor Workbench

The Shop Floor Workbench provides centralized access to the functions an organization needs to manage and monitor the work order process. Super Backflush can be performed on demand as a line option against a work order from within the Shop Floor Workbench program.

See Also

- *Reviewing the Status of Hours, Quantities, and Operation Quantities* for information on the statuses of work orders

Processing Options

See [Super Backflush \(P31123\)](#).

Processing Work Orders Using Quantity at Operation

From Shop Floor Control (G31), choose **Discrete Daily Order Reporting**
From Daily Order Reporting - Discrete (G3112), choose **Hours & Quantities**

You report quantities against work order operations using either Hours and Quantities or Super Backflush. These programs differ in the following ways:

- Hours and Quantities allows entry of different types of hours worked, in addition to quantities.
- Super Backflush allows entry of quantities only.
- Hours and Quantities runs in batch mode. After you enter hours and quantities, you can review and revise these hours and quantities until you update the work order routing.
- You update Super Backflush quantities online.

You can enter completed and scrapped quantities by operation and employee. The system completes the work order if the last operation is defined as a pay point, or you can review and revise the transactions. However, quantities completed at a given operation cannot exceed the quantity completed at the preceding operation. For example, Super Backflush totals the entries for quantity completed and scrapped for the operation and compares that to the quantity at operation. If the total exceeds

- Type Hours
 - Hours
 - Quantity Complete
2. Access the detail area.

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Values List
Scheduling Workbench
Exit to Name Search
On-Line Hours & Quantities
Production Status
Clear Screen

311221 Hours & Quantities Batch Number 3710
Work Date 12/21/17

Action Code T
Order Number/Rate 133647 WO
Item Number 333 ORK SHELF UNIT

Employee	Op Seq	H	Begin	Ending	Hours	Quantity	UM	St	Emp. Name
5001	10.00	1	00:00:00	00:00:00	1.00	7.72			Allen, Ray
					Employee Rate	Equipment Rate			
					Reason Code	Shift	Explanation ORK SHELF UNIT		
5001	10.00	4	00:00:00	00:00:00	10	10			Allen, Ray
					Employee Rate	Equipment Rate			
					Reason Code	Shift	Explanation ORK SHELF UNIT		
					Misc. Dollars	Employee Rate	Equipment Rate		
					Reason Code	Shift	Explanation		
					Misc. Dollars	Employee Rate	Equipment Rate		
					Reason Code	Shift	Explanation		

F4=Fold F5=Sch WB F9=Name Search F10=Hrs & Qty Update F24=More Keys

3. Review the following fields:

- Miscellaneous Dollars
- Reason Code
- Employee Rate

The following graphic illustrates the system highlighted quantity when you enter a quantity that exceeds the Quantity at Operation:

What You Should Know About

Non-pay points

Super Backflush only allows entry for pay points. To handle non-pay points, Super Backflush considers the quantity at operation for a given operation to be the total of the quantity at that operation plus the quantity at operation for all previous non-pay points since the last pay point.

Import/Export

This program supports Import/Export Functionality. See *Technical Foundation* for more information.

Processing Options

See [Work Order Time Entry \(P311221\)](#).

Completing a Work Order with Serialized Components



From Shop Floor Control (G31), choose **Discrete Daily Order Reporting**
From Daily Order Reporting - Discrete (G3112), choose **Full Completion**

When you record a completion for serialized assemblies, the system accesses the Associate Issued Item LSN's program. The associations form is only accessible if you are associating serial number controlled components to serial number assemblies. The system displays the pre-assigned serial numbers and any memo lot information.

By setting a processing option appropriately, you can use one of two display modes of the Associate Issued Item LSN's program:

- Associate components with a single assembly

- Display all components and associates to multiple LSNs

After you generate serial numbers for your work order, you associate your serialized components to a serialized assembly. To associate a serialized component to a serialized assembly, enter the associating quantity.

In addition, the Completion program allows you to enter a memo lot number that is used when both lot and serial numbers are required for tracking assemblies. The system verifies the memo lot number and serial number if you set the Serial Number Required field on the Item Branch/Plant Information form appropriately.

Caution: If you set the appropriate processing options in the Completion program, the system allows you to complete multiple items using the same serial number.

What You Should Know About

Completing non-serialized components

If you complete work orders with non-serialized components you cannot assign serial numbers to the assemblies at completion.

Associating manufactured items with component items when inventory is issued

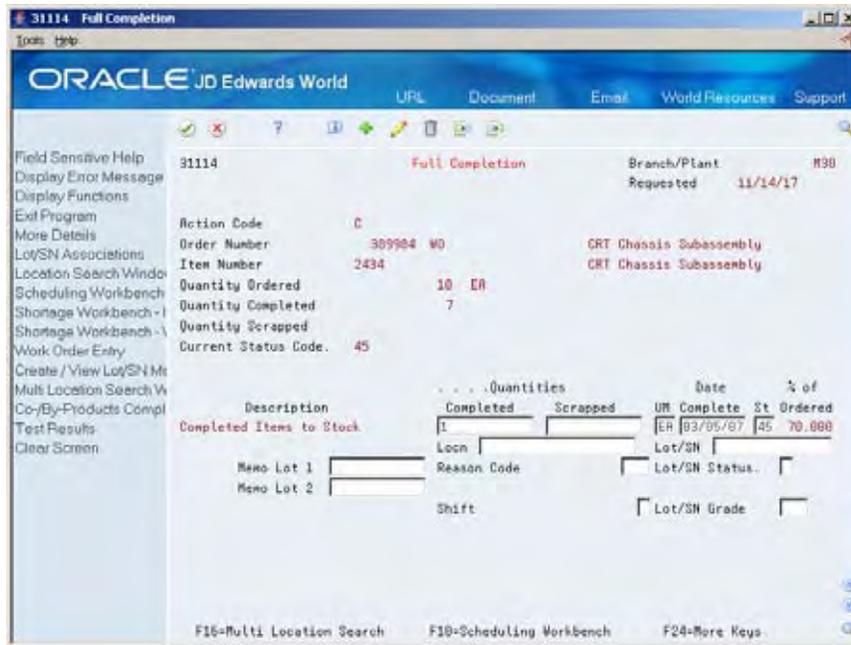
The association between manufactured items and their components can be made when issuing inventory. This is done by pressing F10 to bring up the Assign Serial Numbers program (P3105) from within the Inventory Issues program (P31113). After making a selection, the system establishes a pending association with a sequence number that will be used when the work order is completed.

When completing the work order, ensure that the Single Format Associations window will be called by setting processing option 23 to blank on Full Completion (P31114). When completing the work order the associations will already have been made. After inquiring to view the associations, the 'pending' status will be changed to 'associated' when the screen is updated with C in the Action code.

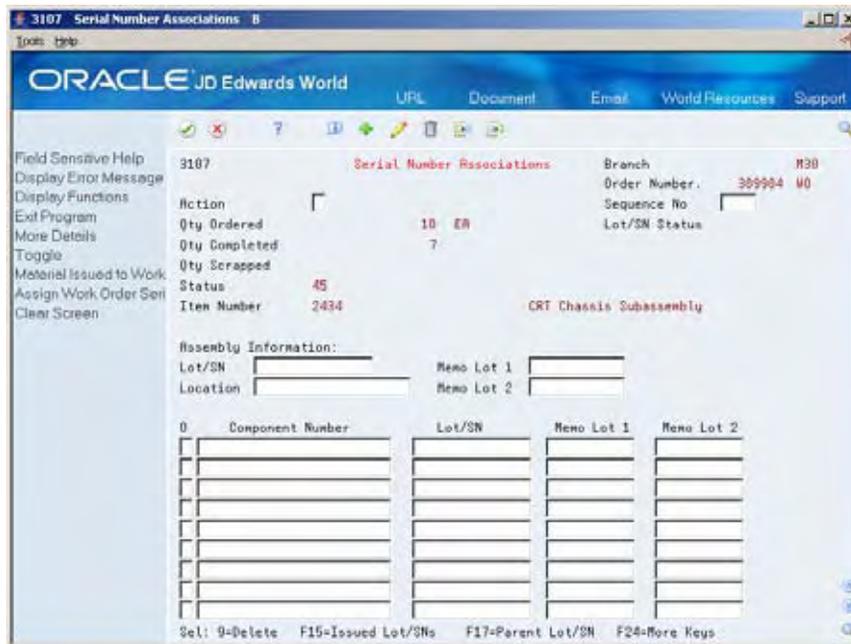
To complete a work order with serialized components

On Full Completion

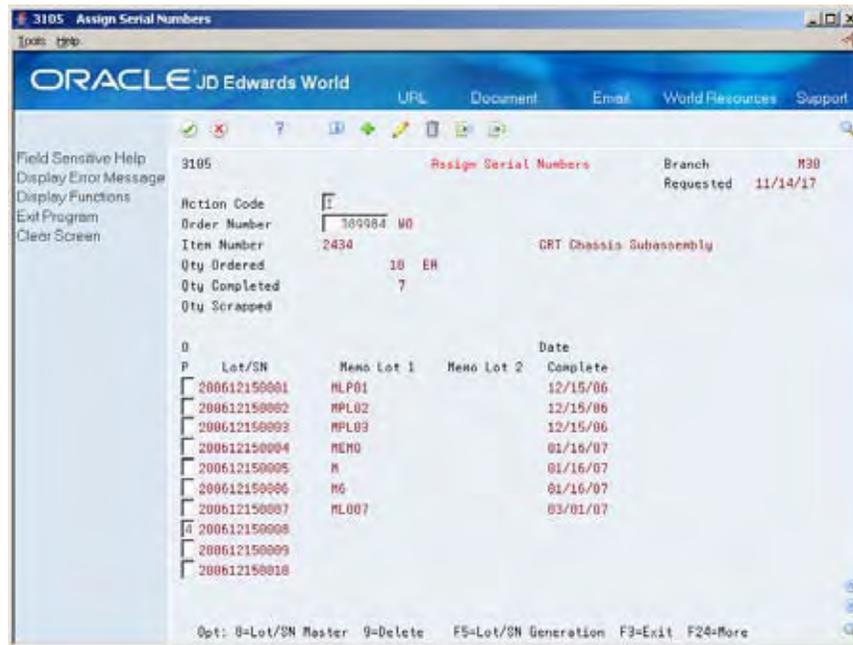
1. Complete the following fields to locate your order:
 - Order Number
 - Branch/Plant
2. Complete the following field to record a completed quantity:
 - Completed Quantity



The system displays Serial Number Associations.

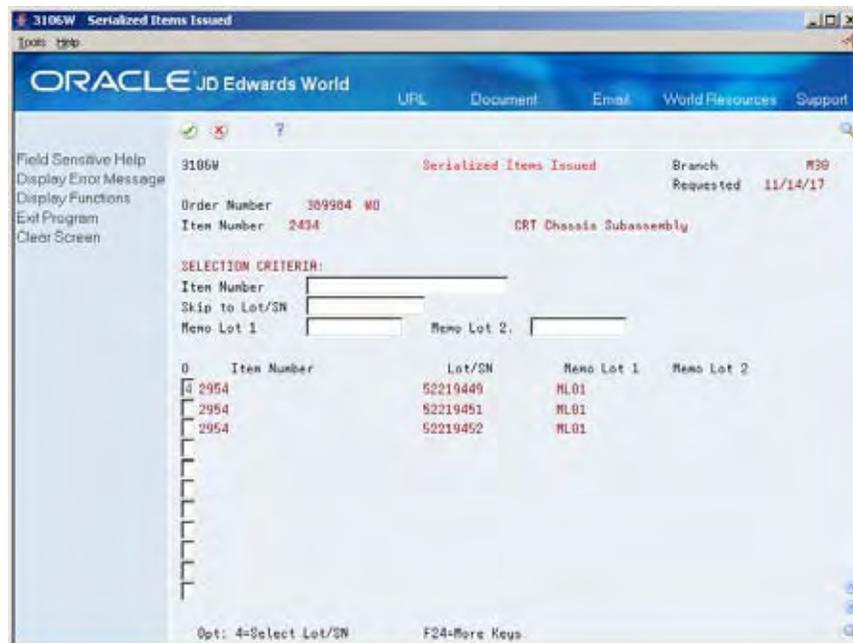


- Press F17 to select a Parent Lot/SN:



After a selection has been made the program returns to the Serial Number Associations window, populating the Assembly Information Lot/SN:

- Press F15 to select from Serialized Items Issued:

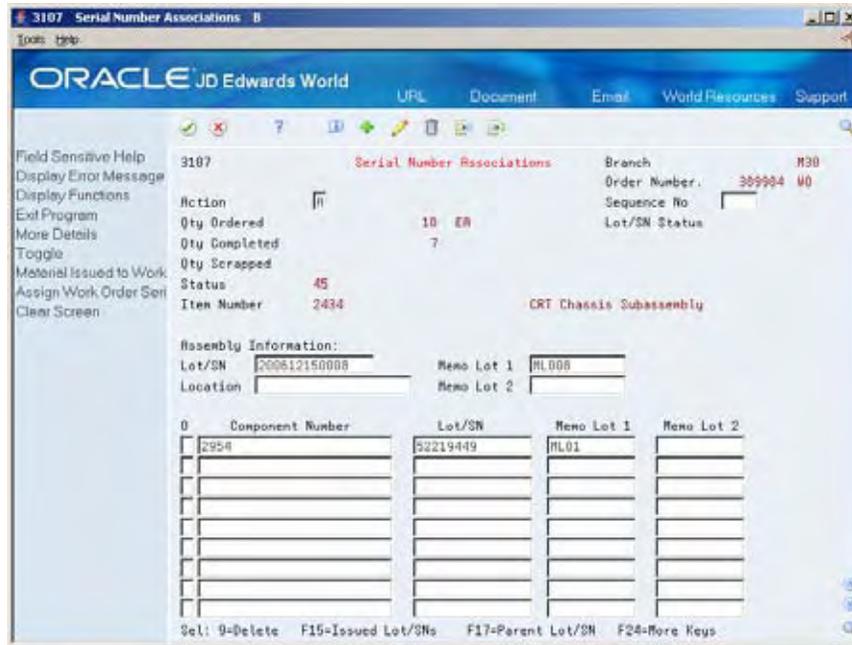


Pressing enter after making a selection returns to the Serial Number Associations window.

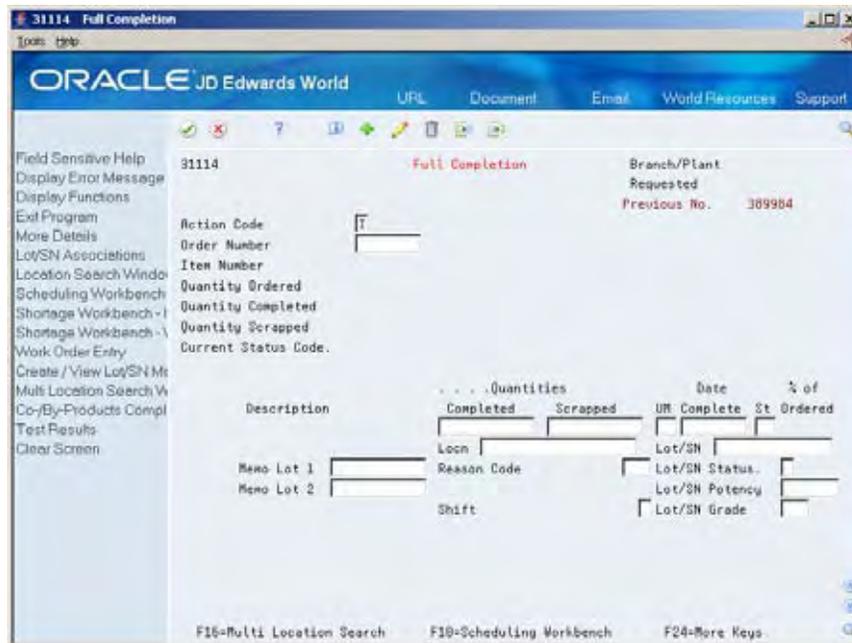
- Now that both Parent and Component Lot/SN Associations have been made, complete the following fields:

- Enter A in the Action Code
- Optionally enter Memo Lot 1 and Memo Lot 2

After pressing Enter the system will default in the next available sequence number.



The Full Completion screen will be displayed:



Field	Explanation
Lot/SN	A number that identifies a lot or a serial number. A lot is a group of items with similar characteristics.
Memo Lot 1	A higher classification or grouping of serial number or lot processed items, maintained within the lot master (F4108).
Memo Lot 2	A higher classification or grouping of memo lot 1 maintained within the lot master (F4108).

Lot Status Processing at Work Order Completion

The following section details how Lot Status is handled during Full, First Partial and Subsequent Work Order Completions (P31114) when Lot Processing has been activated.

Full Completion/First Partial Completion:

If the Lot was entered on the Work Order Header during Work Order entry, the system will retrieve the Lot Number/Lot Status from the Lot Master file (F4108) and display it on the video V31114 (field LOTN) at the time of completion. The Lot Master record is created at the time the lot is entered on the Work Order Header.

If the Lot is blank (not entered at Work Order entry), the system will retrieve the Lot Status from Item Branch File (F4102) and display it.

The user can manually override the lot status with any valid value, including blank. The Completion program will use the Lot Status that is populated on the video at the time of completion to update or create:

- Lot Master Revisions (F4108)
- Item Location (F41021)
- Item Ledger (F4111)

For manual override, the processing option on Super Backflush (P31123), must be set to call the Work Order Completion program (P31114).

Subsequent Completions:

The Completion program will display the Location and Lot from the previous completion as stored in the F4801. It will display the Lot Status from the Item Location File (F41021)

The user can manually override the lot status with any valid value, including blank. The Completion program will use the Lot Status that is populated on the video at the time of completion to update or create:

- Lot Master Revisions (F4108)
- Item Location (F41021)
- Item Ledger (F4111)

For manual override, the processing option on Super Backflush (P31123), must be set to call the Work Order Completion program (P31114).

The Lot Status on the video at the time the user presses enter, must be an allowed value as defined in processing option 7 on the Work Order Completion program (P31114).

Revise the Status of a Work Order

Revising the Status of a Work Order

You might want to remove from the system any work orders that are no longer active or that have been completed. In order to maintain records of the work orders and its progress, you should close the order before you delete it. This ensures that quantity information in the Inventory Management system and manufacturing accounting information is traceable after you delete the work order.

You can remove work orders that you no longer use in one of the following ways:

Method	Description
Change the status of work orders to "closed"	When you change the status of a work order to "closed", the system identifies the order as inactive, but does not delete it. This is the recommended way to de-activate a work order. This method enables you to keep complete historical records on the work order and its associated costing and accounting transactions.
Delete work orders	When you delete a work order, the order is removed from the system entirely. You should complete the work order before deleting it to ensure that manufacturing accounting and inventory information is updated. If you delete the work order before completing it, these records might not be in place. If the quantity completed on the work order is less than the quantity ordered, the system removes the remaining quantity from the Quantity on Work Order field in the Item Branch table (F4102) when you delete the order.
Purge work orders	When you purge work orders, the system deletes the orders based on their status code. You can choose to save the purged records in a separate file. Saving purged records lets you determine whether they contain information you want to retain after you delete the work order. You can also delete an Lot Serial Number master record when a work order for a serialized parent is purged.

This section contains the following:

- [Changing the Status of a Work Order to "Closed"](#)
- [Purging a Work Order](#)

What You Should Know About

Reporting quantities

If an order is in process, JD Edwards World recommends that you report completed and scrapped quantities against it before you delete it.

Deleting an order

Before you can delete an order from the system, you must first delete the parts list and routing instructions attached to the work order.

You cannot delete a work order if:

- The order number is used as a subledger number in the Account Ledger table (F0911).
- The work order is a parent order to other work orders.
- Parts have been issued to the work order.
- Labor has been reported against the work order.

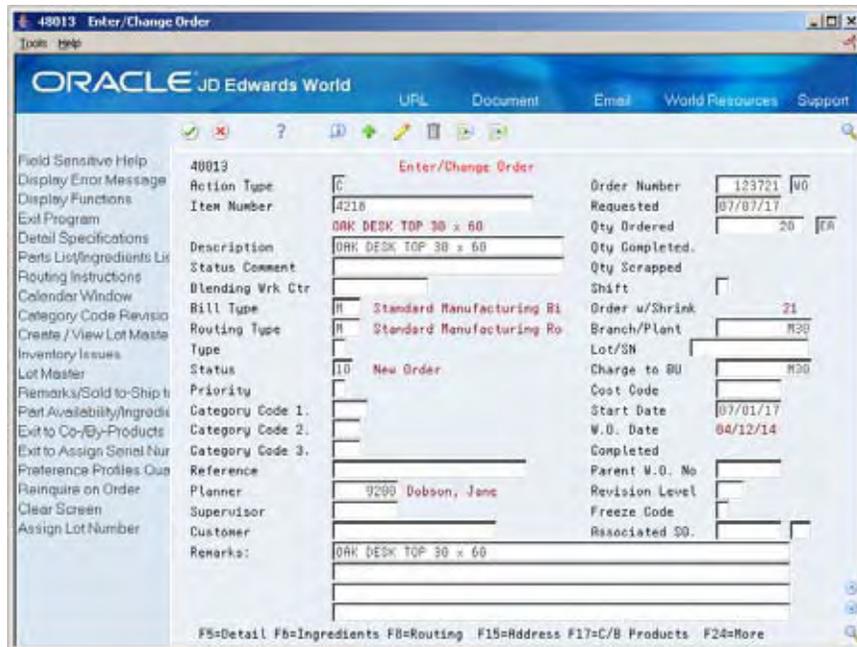
Changing the Status of a Work Order to “Closed”

	From Shop Floor Control (G31), choose Discrete Daily Order Preparation From Daily Order Preparation - Discrete (G3111), choose Enter/Change Order
---	--

To close a work order without deleting it from the system, you change the status of the order.

To change the status of a work order to “closed”

On Enter/Change Order



Complete the following fields:

- Order Number
- Status

Processing Options

See [Manufacturing Work Order Entry \(P48013\)](#).

Purging a Work Order



From Advanced Shop Floor Control, enter 27
From Advanced Shop Floor Control (G3131), choose **Purge Orders**

Work Order Purge is a DREAM Writer batch program that deletes selected work orders from your system. The system purges the selected work orders and their associated information from the following tables:

- Work Order Master (F4801)
- Work Order Instruction/Disposition (F4802)
- Shop Floor Control Parts List (F3111)
- Shop Floor Control Routing Instructions (F3112)
- Work Order Time Transactions (F31122)

When you purge work orders, you can:

- Purge unlimited work orders based on their status codes
- Automatically delete associated parts lists and routings
- Save the work order information in a special purge file

Before You Begin

- Complete the accounting for the work orders you intend to purge before you purge them from the system. See *Working with Work Orders* in the *Product Costing and Manufacturing Accounting Guide* for information on how to complete the accounting.

What You Should Know About

Naming saved purged records

Set the processing options to save the records you purge in a special purge library. The system names this library JD Edwards World followed by the current system date (without separators). For example, if you purge the records on January 1, 1998, the purge library is named JDE010198. The system creates a physical file with the same name within that library. If you purge the same file multiple times on the same day, the system adds the purged records to the records already in the purge file for that day.

Reorganizing files

Set the processing options to reorganize your files after the purge is complete. Reorganizing the files redistributes the remaining data so that your disk space is more efficiently used. The files you want to reorganize cannot be in use elsewhere on your system, but must be exclusively allocated to the DREAM Writer job performing the purge.

If you submitted a DREAM Writer version of the purge program using a logical file build rather than OPNQRYF, the logical file built over the purged file is included in the reorganization. This might increase the time required to perform the file reorganization.

Using OPNQRYF

If you use OPNQRYF to select records to be purged, you must specify at least one field in data sequencing and set the Delete field in additional parameters to Y for the DREAM Writer version that you use.

Processing Options

See [Purge Orders \(P4801P\)](#).

Process Kanbans

Processing Kanbans

While the requirements for material is driven by demand, the movement is controlled by visual cues called kanbans. Kanbans are predetermined quantities of components at specified locations on the production line. They are designed to minimize work-in-process inventories. One program with two screen formats manage the electronically implemented kanbans.

This section contains the following:

- [Processing Kanban Consumption by Item](#)
- [Processing Kanban Supply by Item](#)
- [Processing Kanban Status Override](#)

Use the consumption program to access kanbans at a consuming location, and the supply program to access kanbans at a supplying location, by specifying one or any two of the following criteria:

- Item
- Location
- Supplier
- Kanban identification

You process kanbans in one of two modes:

- One-Phase
- Two-Phase

One-Phase

One-phase assumes the completion and transfer to the consuming location are performed in one step, in which you complete the quantity directly to the consuming location and change the kanban status to checked-in (1).

Two-Phase

Two-phase assumes the completion and transfer are performed separately. You complete the quantity to the supplying location and change the kanban status to completed (3). After the quantity has physically been received at the consuming location, a transfer from the supplying location to the consuming location occurs and the kanban status is changed to checked-in (1).

If you check in a kanban quantity from the supplier, the system can initiate a receipt transaction if the kanban master flag is on.

You can process kanbans for items that are:

- Inventoried
- Manufactured (sub-assemblies/phantoms)
- Externally supplied

Inventoried Items Processing

When you check out a kanban that is inventoried, the kanban status is changed. The supplying location replenishes the kanban quantity. You then complete and check in the kanban, which results in an inventory transfer transaction.

Manufactured Processing

When you check out a kanban that is manufactured, the program either creates a work order, or looks for an existing rate. It bases its action on the items' order policy code. (If the system does not find a rate, it creates one.) When the system creates a rate, it automatically attaches the parts list and routing. When you check in the kanban, you complete the work order or rate, issue parts, enter hours and quantities, and transfer the parent item to the consuming location.

Manufactured Processing - Phantom Item

When you check out a kanban supplied by a work center/production line, and the item is a phantom, no transactions outside of inventory transfers occur. There are no work orders or rates to process; the item is simply replenished by the producing line and the kanban is completed and checked in. This results in an inventory transfer transaction, from the supplying location to the consuming location.

Externally Supplied Processing

When you check out kanbans from an external supplier, the system may create a new purchase order, or use an existing one. However, there must be an open purchase order for the item. In addition, when you check out the kanban, the system may also initiate an Electronic Data Interchange (EDI) transaction. When you check in kanbans from an external supplier, the system may optionally perform a receipt against the purchase order.

Processing Kanban Consumption by Item



From Shop Floor Control (G31), choose Repetitive Daily Processing From Daily Processing - Repetitive (G3115), choose Kanban Consumption
--

Kanban Consumption allows you to access all kanbans at a given consuming location. After you locate your items, depending on the status of each item, you can make one of the following status changes at a consuming location:

- Checked-in (1)
- Checked-out (2)

To process kanban consumption by item

On Kanban Consumption

Item Number	Kanban ID	Card No.	Sts	Quantity	UH	Typ	Kanban #
2047	745	1	2	30	EA	2	
2047	746	1	2	30	EA	2	

Opt: 1=Check In 2=Check Out 9=Cancel Kanban F24=More Keys

1. Complete the following fields:

- Item Number
- Branch/Plant

2. Access the detail area.

3. To check in the item, enter a 1 in the following field next to the item number:
 - Option
 - Quantity may also be modified
4. Complete the following fields if checking in a kanban that was supplied by the production line which included the creation of a rate or work order:
 - Employee Number
 - Shift
5. To check out the item, enter a 2 in the following field next to the item number:
 - Option

Processing Options

See [Kanban Consumption/Supply \(P3157\)](#).

Processing Kanban Supply by Item

	From Shop Floor Control (G31), choose Repetitive Daily Processing From Daily Processing - Repetitive (G3115), choose Kanban Supply
---	---

Kanban Supply allows you to access all kanbans that need replenishment for items stored or produced at a given supplying location. After you locate your items, depending on the status of each item, you can make one of the following status changes at a supplying location:

- Checked-in (1)

- Completed (3)

Inventory and statuses are affected as follows:

- One-phase – inventory is immediately received and available at the consuming location, and the status is changed to checked-in (1).
- Two-phase – the completion and transfer are reported separately:
 - The quantity is completed to the supplying location, the kanban status is changed to a complete (3).
 - After the quantity has physically been received at the consuming location, a transfer is performed from the supply location to the consuming location and the kanban status is changed to checked-in (1).

To process kanban supply by item

On Kanban Supply

3157 Kanban Supply Branch

Oracle JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Clear Screen

3157 Kanban Supply

Branch/Plant R20
Employee Number
Shift

Action Code F
Item Number 2037
Supply Location
Supplier
Kanban ID

Front Fork, Touring

Item Number	Kanban ID	Card No.	Sts	Quantity	UM	Typ	Kanban #
2037	725	1	2	30	ER	1	
2037	726	1	2	30	ER	1	

Opt: 1=Check In 3=Complete F24=More Keys

1. Complete the following fields:

- Item Number
- Branch/Plant

2. Access the detail area.

3157 Kanban Supply Branch

ORACLE JD Edwards World

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Clear Screen

3157 Kanban Supply

Branch/Plant: R20
Employee Number: []
Shift: []

Action Code: []
Item Number: 2037
Supply Location: []
Supplier: []
Kanban ID: []

Front Fork, Touring

0	Item Number	Kanban ID	Card No.	Qty	Quantity	UH	Typ	Src Related Kanban #
[]	2037	725	1	2	30	ER	1	R28
	Consuming Location	LA.18						
	Supply Location	LC.50						
	Kanban Size	30						
	Container Size	30						
[]	2037	726	1	2	30	ER	1	R20
	Consuming Location	LA.18						
	Supply Location	LC.50						
	Kanban Size	30						
	Container Size	30						

Opt: 1=Check In 3=Complete F24=More Keys

3. To check in the item, enter a 1 in the following field next to the item number:
 - Option
 - Quantity may also be modified
4. Complete the following fields if checking in a kanban that was supplied by the production line which included the creation of a rate or work order:
 - Employee Number
 - Shift
5. To complete the item, enter a 3 in the following field next to the item number:
 - Option
 - Quantity may also be modified

To cancel a kanban

On Kanban Consumption

The screenshot shows the 'Kanban Consumption' form in Oracle JD Edwards World. The form includes a menu on the left with options like 'Field Sensitive Help', 'Display Error Message', 'Display Functions', 'Exit Program', 'More Details', and 'Clear Screen'. The main area contains input fields for 'Action Code', 'Item Number' (with value 2037), 'Consuming Location', 'Supplier', and 'Kanban ID'. To the right, there are fields for 'Branch/Plant', 'Employee Number', and 'Shift'. Below these is a table with the following data:

Item Number	Kanban ID	Card No	Sts	Quantity	UM	Src Related
2037	725	1	2	30	EA	1
2037	726	1	2	30	EA	1

At the bottom of the form, there is a legend: 'Opt: 1=Check In 2=Check Out 9=Cancel Kanban' and a key 'F24=More Keys'.

1. Complete the following fields:
 - Item Number
 - Branch/Plant
 - Kanban ID (optional)
2. Press Enter.
3. Enter a 9 in the following field next to the item number:
 - Option
4. Press Enter to display a confirmation message.
5. Enter a Y in the field next to the confirmation message:

Processing Options

See [Kanban Consumption/Supply \(P3157\)](#).

Processing Kanban Status Override

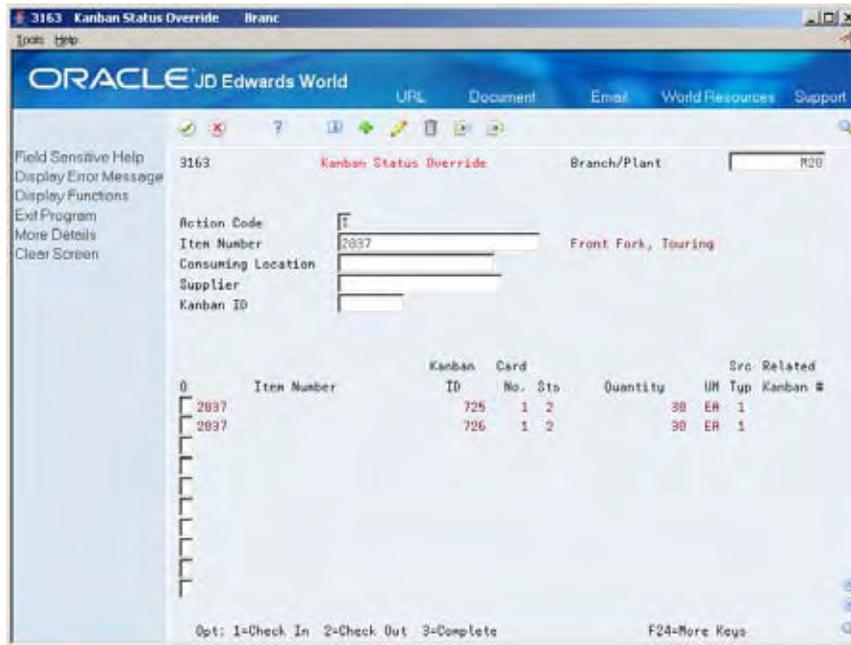
	From Shop Floor Control (G31), enter 27 From Advanced Shop Floor Control (G3131), choose Kanban Status Override
---	---

Should you find that a kanban card is not at the correct status, you can bypass normal kanban processing and change the status using the Kanban Status Override program (P3163). This will only update the status on the kanban and not perform any associated processing. This program has been placed on an advanced menu since it should only be used for remedial purposes by authorized users.

If all kanban card records are updated to the same status, the program will also update the status on the Kanban Master record.

To process kanban status overrides

On Kanban Status Override



Item Number	Kanban ID	Card No.	Sts	Quantity	WH	Typ	Src	Related Kanban #
2037	725	1	2	30	ER			1
2037	726	1	2	30	ER			1

Opt: 1=Check In 2=Check Out 3=Complete F24=More Keys

1. Complete the following field:

- Option

You can use the processing options to control which status codes the program is allowed to update.

Processing Options

See [Kanban Status Override \(P3163\)](#).

Review Information

Reviewing Information

You can review information for components, such as useability, availability, or supply and demand. You can review all item transactions in the system. And, you can review all work orders that make up the load at a particular work center. Also, you can view the components and quantities of two parts lists or view only the differences.

This section contains the following:

- [Reviewing Material Information](#)
- [Reviewing Item Ledger Information](#)
- [Reviewing Work Order Status](#)
- [Reviewing Parts List Comparison](#)

See Also

- *Reviewing Availability (P30205)*
- *Reviewing Availability (P3121)*
- *Managing Shortage Information (P3118)*
- *Reviewing Hours and Quantities Transactions*

Reviewing Material Information

You can choose from three different programs to review information:

- Component Useability
- Summary Availability
- Supply/Demand

Use the Component Useability program to display the quantity of a parent item that can be produced based on the component quantity. The system adjusts the production quantity in relation to the component quantity. This is useful in determining what can be produced based on component material on hand. You can restrict the data that is displayed to a specific lot, grade, or potency of the item.

Use the Summary Availability program to check the availability of an item in your branches or plants. You can display the date in detail or summary mode, and for one branch or all of your branches.

Processing options allow you to omit item records that have a zero quantity available and control which versions of associated programs are used when you access them. In addition, you can use the processing options and certain fields to display availability by grade or potency ranges.

Use the Supply/Demand program to show the demand, supply, and available quantities for an item in your inventory. You can access other forms to confirm detail information on work orders, parts lists, purchase orders, and sales orders. The information is interactively displayed from Purchase Order Management (system 42), Shop Floor Control (system 31), and Sales Order Management (system 43).

Use the processing options in this program to:

- Include both supply and demand planned orders from the MPS/MRP/DRM Message table (F3411).
- Include forecast demand from the Forecast table (F3460).
- Display an Available to Promise line that calculates the units available for sale or distribution before the arrival of future supplies.
- Display a Cumulative Available to Promise line that calculates the running total of Available to Promise.
- Specify which version of associated DREAM Writer programs are used when you access the programs. You should use the same program version for each Distribution Requirements Planning generation you run to ensure that your data is consistent between systems.
- Set up different versions of inclusion rules to include the document type, line type, and status of each purchase order, sales order, or work order. This program's processing option for the Supply/Demand Inclusion Rules must contain a valid version of inclusion rules from the MPS/MRP Resource Rules table (F34004). You should set this option to use the same version that you use in your Distribution Requirements Planning generation in order to facilitate tracking among the systems.

Reviewing material information consists of:

- Reviewing component useability
- Reviewing summary availability
- Reviewing supply and demand information
- Printing supply and demand

Before You Begin

- Set up the Part Useability selection from the processing options before you review component useability

To review component useability



From Shop Floor Management (G31), choose **Daily Order Preparation - Discrete**
From Daily Order Preparation - Discrete (G3111), choose **Component Useability**

On Component Useability

30201 Component Useability Comp

ORACLE JD Edwards World

Component Useability

Component: 0277
FRAMING KIT, 30x60 DESK

Quantity: 1 ER

Item Rev. Level: ER

0 Level	Item Number	Description	Prod. Qty	UM
1	5120	Oak Desk With Chair	1	ER

Opt: 1=Item Master 2=Next Level F6=Item Search F12=Prev Level F24=More

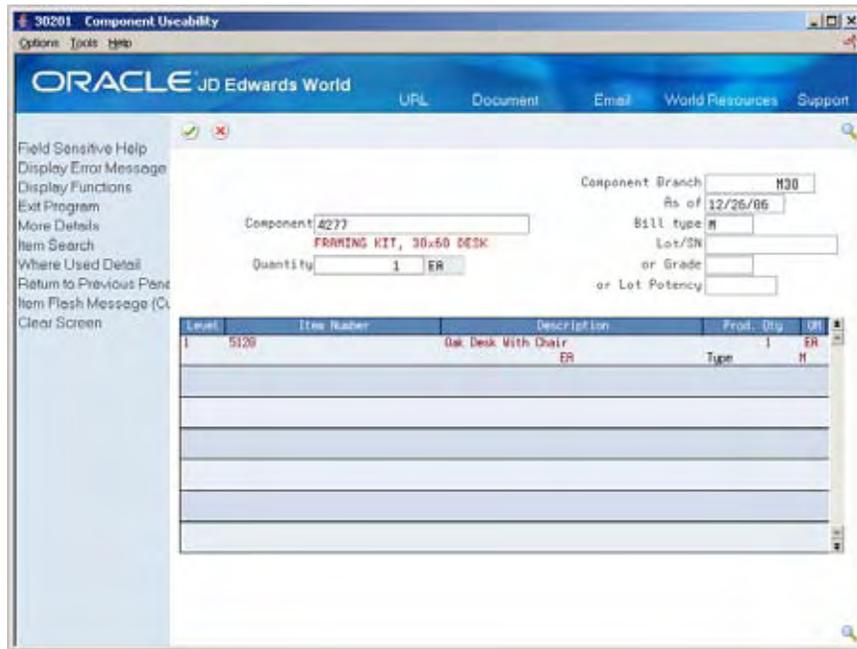
1. Complete the following fields:

- Component
- Quantity

The following fields display component information:

- Item Number
- Production Quantity

2. Access the detail area.



The following fields display component information:

- Batch Quantity
- Type

Field	Explanation
2nd Item Number	<p>The system provides three separate item numbers plus an extensive cross-reference capability to alternate item numbers. These item numbers are:</p> <ol style="list-style-type: none"> 1. Item Number (short) - An 8-digit, computer-assigned item number. 2. 2nd Item Number - The 25-digit, free-form, user defined, alphanumeric item number. 3. 3rd Item Number - Another 25-digit, free-form, user defined, alphanumeric item number. <p>In addition to these three basic item numbers, an extensive cross-reference search capability has been provided (see XRT). Numerous cross-references to alternate part numbers can be user defined (for example, substitute item numbers, replacements, bar codes, customer numbers, or supplier numbers).</p>

To review summary availability

	<p>From Shop Floor Management (G31), choose Daily Order Preparation - Discrete From Daily Order Preparation - Discrete (G3111), choose Summary Availability</p>
--	--

On Summary Availability

41202 Summary Availability

Item Number: 3128
Oak Desk With Chair

Branch/Plant: R99
S/D: 0
U/M: ER
Lot Pot: -

Location	On Hand	Committed	Available	On Receipt
P	475	445	30	31055
Totals:	475	445	30	31055

Opt: 1=Detail Availability 2=Branch/Plant Information F24=More Keys

Complete the following field:

- Item Number

The following fields display item information:

- Primary/Secondary Storage Location
- Location
- On Hand
- Committed
- Available
- On Receipt

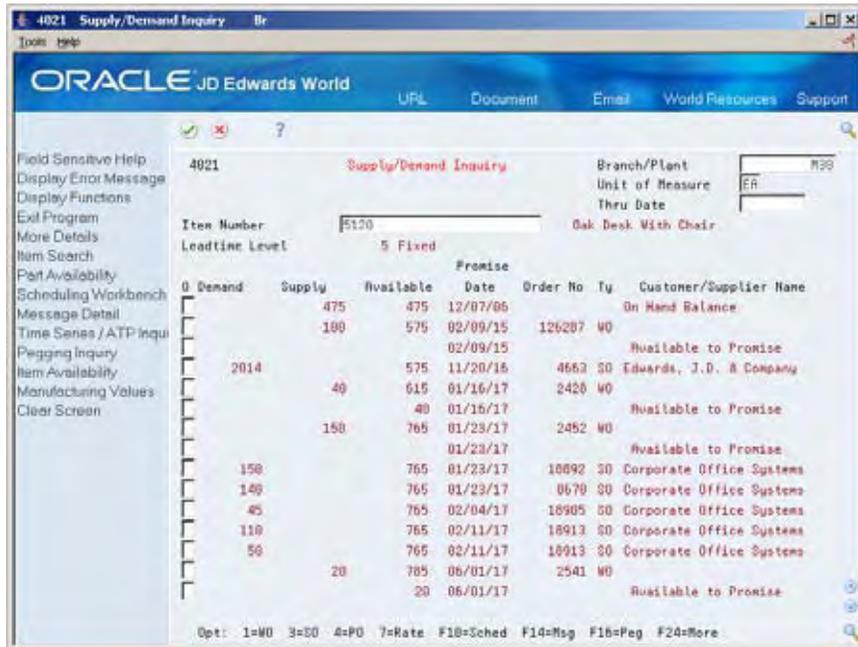
Field	Explanation
P S	A value that indicates if this is the primary or secondary location for this item within this stocking location. Valid values are: P Primary storage location S Secondary storage location
	Note: You can only have one storage area within each branch or warehouse marked as primary. In some cases, the system uses the primary storage area as the default.

Field	Explanation
Totals:	The total quantity committed to a specific location. The total is calculated from the following fields: <ul style="list-style-type: none"> ▪ Soft Committed to Sales Orders ▪ Hard Committed to Sales Orders ▪ Soft Committed to Work Orders ▪ Hard Committed to Work Orders
On Receipt	The total number of items on receipt for a specific location. The total is based on the total number of items entered in the Quantity on Purchase Order Receipts and the Quantity on Work Order Receipt fields.

To review supply and demand information

	From Shop Floor Management (G31), choose Daily Order Preparation - Discrete From Daily Order Preparation - Discrete (G3111), choose Supply/Demand Inquiry
---	--

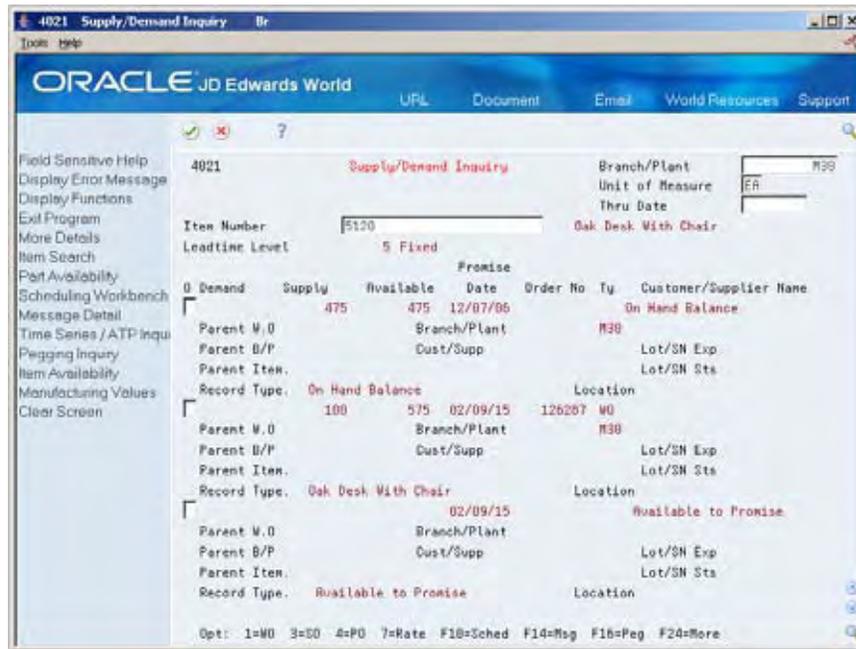
On Supply/Demand Inquiry



1. Complete the following fields:

- Branch/Plant
- Item Number

2. Access the detail area.



The following fields display item information:

- On Hand Balance
- Parent Work Order

What You Should Know About

Demand quantities

The demand quantities are shown by date and can include safety stock, quantities on sales orders, work order parts lists, lower level planned order demand, and interplant and forecasted demand.

Supply quantities

The supply quantities are shown by date and can include on-hand inventory and quantities on purchase orders, manufacturing work orders, planned orders, and rate schedules. Supply quantities shown without a date or order information represent current availability by branch/plant storage location.

To print supply and demand



From Shop Floor Management (G31), choose **Periodic Functions - Discrete**
From Periodic Functions - Discrete (G3121), choose **Supply/Demand**

The Supply and Demand report shows the supply, demand, and available quantities for an item. This report can include quantities of materials in:

- On-hand inventory

- Safety stock
- Sales orders
- Purchase orders
- Work orders
- MPS/MRP planned orders
- Forecasts
- Rate schedules

The information on this report and the processing options used to generate it are the same as on Supply/Demand Inquiry.

4051		JD Edwards World Supply and Demand		Page - 1	Date - 3/15/18	
Item Number . . . 1001		Pen & Pencil Set		Unit of Measure . . EA		
Branch	Location	Lot	Demand	Supply	Request Available Date	Order No Ty Description / Vendor Name
10				769	769	On Hand Balance
10					769	Available to Promise
10				6	775 03/09/15	2004 OP JD Edwards World
10				4	779 03/09/15	2006 OP Vector Manufacturing Co
10					8 03/09/15	Available to Promise
10			1		778 03/09/15	2048 SO Sales Order
10			1		777 03/09/15	2050 SO Sales Order
10				10	787 03/10/15	2007 OP JD Edwards World
10				1	788 03/10/15	2008 OP Vector Manufacturing Co
10					11- 03/10/15	Available to Promise
10			10		778 03/10/15	2051 SO Sales Order
10			10		768 03/14/15	2053 SO Sales Order
10			2		766 03/14/15	2054 SO Sales Order

Processing Options

- See [Component Useability \(P30201\)](#).
- See [Summary Availability \(P41202\)](#).
- See [Supply/Demand Inquiry \(P4021\)](#).

Reviewing Item Ledger Information

	From Shop Floor Control (G31), choose Discrete Periodic Functions From Periodic Functions - Discrete (G3121), choose Item Ledger
---	---

Use the Item Ledger program to display a detailed history of the transactions that have occurred for an item. The transactions include:

- Inventory issues, adjustments, and transfers
- Sales posted after sales update
- Purchase receipts
- Manufacturing completions and issues
- Physical inventory updates

You can limit the date displayed by entering values in any of the header fields. You can toggle between transaction dates (running balance) and general ledger dates for items and set a default display in the processing options.

Because the dates in the item ledger and running balance might differ for an item, the values displayed might also differ.

Reviewing item ledger information includes the following tasks:

- Reviewing cost information
- Reviewing quantity information in running balance format
- Reviewing cost information in running balance format

What You Should Know About

Using the running balance format

In the running balance format:

- You must enter a valid From date.
- The balance forward is a cumulative amount up to the From date you enter. The system retrieves the As Of records for the specified item, branch, location, and lot you enter. After the balance forward is calculated, the system displays item ledger records with a general ledger date from the From date forward, in ascending order.
- You can toggle between quantities and costs.
- Transactions resulting from manufacturing completions and issues do not display unless they have been processed through manufacturing accounting.

If you have not run the As Of Generation program to create records in the Item As Of table (F41112), or a balance forward record does not exist for your item, it might take additional time to accumulate the item ledger records to create a balance forward.

The system displays balance forward quantities in their primary unit of measure.

To review cost information

On Item Ledger (The CARDEX)

4111 Item Ledger

Tools Help

ORACLE JD Edwards World UPL Document Email World Resources Support

Field Sensitive Help
 Display Error Message
 Display Functions
 Exit Program
 Exit to Item Search
 Ledger/Running Balance
 Inquire By Document No.
 Amount/Quantity (Run)
 General Ledger/Original
 Bulk Product Transactions
 Clear Screen

4111 Item Ledger
 Item Ledger
 Dt From/Trans: #
 Dt Thru/Trans: #
 Document Type: #
 G/L Document Type

Item Number 5120 Oak Desk With Chair
 Branch/Plant M30 Memphis Mfg. Plant
 Location #
 Lot/SN #

Quantity on Hand 475 ER
 Value 795,723.66

Document	Ty	Date	Branch/Plant	Quantity	UM	Unit Cost	Ext. Cost
4400	IA	01/02/17	M30	230	EA	1,675.2077	385,297.77
118105	IC	10/29/16	M30	5546	EA	734.0089	4,075,250.16
118084	IC	07/29/16	M30	4637	EA	734.0089	3,407,308.87
118050	IC	04/29/16	M30	3311	EA	734.0089	2,432,952.27
118050	IC	01/30/16	M30	3311-	EA	734.0089	2,432,952.27-
118050	IC	01/30/16	M30	3311-	EA	734.0089	2,432,952.27-
118050	IC	01/30/16	M30	3311-	EA	734.0089	2,432,952.27-
118025	IC	01/30/16	M30	3296	EA	734.0089	2,421,930.13
118050	IC	01/30/16	M30	9933	EA	734.0089	7,290,856.00
110189	IC	10/05/15	M30	4359	EA	734.0089	3,203,032.00
110171	IC	07/05/15	M30	3355	EA	734.0089	2,465,283.86

Opt: 9=Details F5=Item Search F18=Ledger/Running Balance F24=More Keys

Complete the following fields:

- Item Number
- Branch/Plant
- Location
- Lot
- Date From
- Date Through

To review quantity information in running balance format

On Item Ledger (The CARDEX)

Change the format to Running Balance.

The screenshot shows the Oracle JD Edwards World Item Ledger window. The title bar reads "4111 Item Ledger". The menu bar includes "Tools", "Help", "UPL", "Document", "Email", "World Resources", and "Support". The main window displays the following information:

Field Sensitive Help
 Display Error Message
 Display Functions
 Exit Program
 Exit to Item Search
 Ledger/Running Balance
 Inquire By Document N
 Amount/Quantity (Runn
 General Ledger/Origina
 Bulk Product Transactio
 Clear Screen

4111 Item Ledger Dt From/G/L 11/30/06
 Running Balance Dt Thru/G/L

Item Number: 5120 Oak Desk With Chair
 Branch/Plant: N30 Memphis Rfg. Plant
 Location: #
 Lot/SN: #

Document	Ty	Date	Branch/Plant	Unit Cost	Quantity	Quantity Balance
41026		06/16/12	N30	.0000		
2239	IB	11/22/13	N30	734.0009		
30835	IB	03/29/14	N30	940.3988		
1031	RI	02/15/15	N30	734.0009	911-	911-
1033	RI	03/16/15	N30	734.0009	764-	1675-
1030	RI	04/16/15	N30	734.0009	712-	2387-
1040	RI	05/16/15	N30	734.0009	729-	3116-
1042	RI	06/16/15	N30	734.0009	783-	3899-
1044	RI	07/16/15	N30	734.0009	876-	4775-
1046	RI	08/16/15	N30	734.0009	1158-	5933-
1048	RI	09/16/15	N30	734.0009	1060-	6993-

Opt: 5=Details F5=Item Search F10=Ledger/Running Balance F24=More Keys

To review cost information in running balance format

On Item Ledger (The CARDEX)

Select the Amount/Quantity format.

The screenshot shows the Oracle JD Edwards World Item Ledger window. The title bar reads "4111 Item Ledger". The menu bar includes "Tools", "Help", "UPL", "Document", "Email", "World Resources", and "Support". The main window displays the following information:

Field Sensitive Help
 Display Error Message
 Display Functions
 Exit Program
 Exit to Item Search
 Ledger/Running Balance
 Inquire By Document N
 Amount/Quantity (Runn
 General Ledger/Origina
 Bulk Product Transactio
 Clear Screen

4111 Item Ledger Dt From/G/L 11/30/06
 Running Balance Dt Thru/G/L

Item Number: 5120 Oak Desk With Chair
 Branch/Plant: N30 Memphis Rfg. Plant
 Location: #
 Lot/SN: #

Document	Ty	Date	Branch/Plant	Quantity	Unit Cost	Dollar Balance
41026		06/16/12	N30		.0000	
2239	IB	11/22/13	N30		734.0009	10,370.22
30835	IB	03/29/14	N30		940.3988	2,246,174.90
1031	RI	02/15/15	N30	911-	734.0009	1,576,764.07
1033	RI	03/16/15	N30	764-	734.0009	1,015,370.07
1030	RI	04/16/15	N30	712-	734.0009	492,106.13
1040	RI	05/16/15	N30	729-	734.0009	43,409.56-
1042	RI	06/16/15	N30	783-	734.0009	618,844.93-
1044	RI	07/16/15	N30	876-	734.0009	1,262,537.53-
1046	RI	08/16/15	N30	1158-	734.0009	2,113,446.24-
1048	RI	09/16/15	N30	1060-	734.0009	2,892,343.67-

Opt: 5=Details F5=Item Search F10=Ledger/Running Balance F24=More Keys

Processing Options

See [Item Ledger Inquiry \(P4111\)](#).

Reviewing Work Order Status



From Shop Floor Control (G31), choose **Repetitive Daily Processing**
From Daily Processing - Repetitive (G3115), choose **Production Status**

Use Production Status to view the status of all work orders by work center, production line, and item, within the status and date ranges. The system shows historical information as well as open orders.

From the Production Status form you can access the Production Transaction History form, where you can view a record for each entry of completions and scrap at an operation.

To review production status

On Production Status

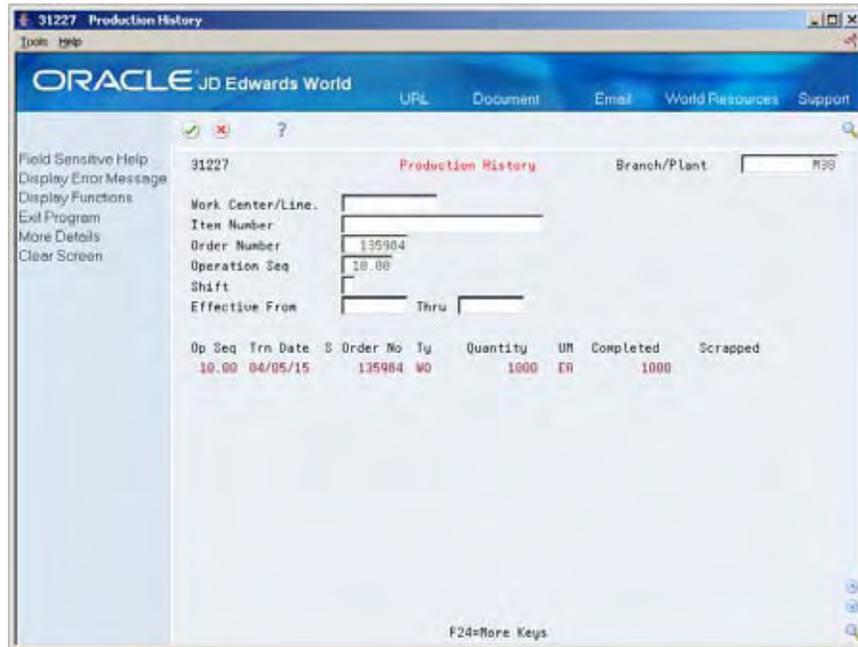
Op	Start	Req	Qty Remaining	UM		
0						
2899	125984	00	02/20/17	02/27/17	0	EA

FS=Order Completion 1=Production History 2=Line Dispatch List F26=More

1. Complete the following fields:

- Work Center/Line
- Item Number
- Branch/Plant

2. To view the various transactions reported against an order, choose Production History.



Reviewing Parts List Comparison



From Shop Floor Control (G31), choose **Discrete Daily Order Preparation**
From Daily Order Preparation - Discrete (G3111), choose **Parts List Comparison**

Use Parts List Comparison to view the different items and quantities of two parts lists. You can display all items for the two parts lists or only the differences. In addition, you can limit displayed data to a specified work center or dispatch group.

Before You Begin

- Attach the components to an operation on the routing to view these components

What You Should Know About

Modes of display

This program has two modes of display you can use to locate information:

1 = Display all components

2 = Display only differences between the two parts lists

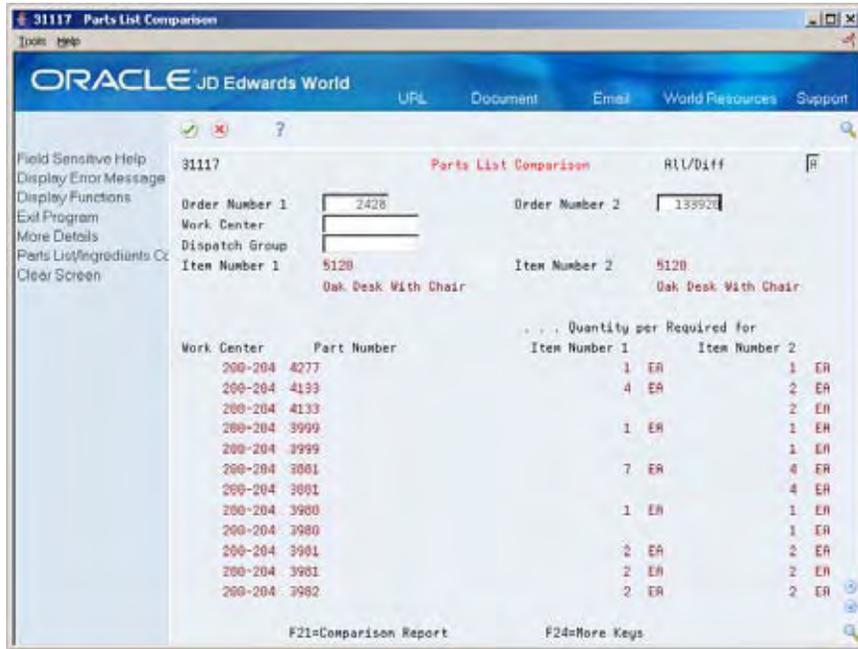
If you leave the mode blank, the mode of display is the differences between the two parts lists.

Printing a report

Use the appropriate selection to print the parts list comparison in report form. Use the processing options to specify work orders, the mode to print, and a work center, a dispatch group, or both.

To review parts list comparison

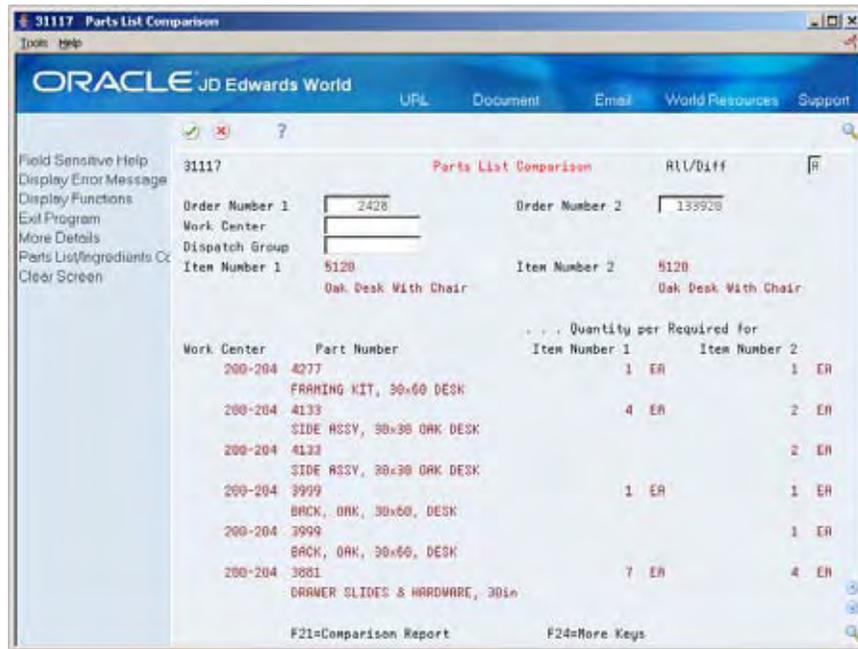
On Parts List Comparison



1. Complete the following fields to locate all components of your work orders:

- Work Order 1
- Work Order 2

2. Access the detail area.



3. Review the part descriptions.

Processing Options

See [Parts List Comparison \(P31117\)](#).

Print Material and Operation Reports

Printing Discrete Manufacturing Reports

Print discrete manufacturing reports to effectively manage your work order and rate schedule information. Two types of discrete manufacturing reports are available:

Type	Description
Materials reports	Work Order Summary
	Component Shortages
	All Shortages
	Supply and Demand
Operations reports	Dispatch List
	Hours and Quantities Proof

You can use discrete manufacturing reports to identify all:

- Work orders in your system
- Component parts that are required to complete a work order and its availability
- Item shortages
- Supply, demand, and available quantities for an item

The system uses information in the following tables to produce reports:

Table	Description
Work Order Summary	Work Order Master table (F4801)
All Shortages	Shortage Maintenance Master table (F3118)

What You Should Know About

Kanban implementation

You can implement a kanban system to simplify inventory control in a discrete manufacturing environment as well as a repetitive manufacturing environment.

See *Process Kanbans* for instructions on using kanbans.

See Also

- *Printing a Summary of Work Orders (P31400)*
- *Printing Component Shortages (P31418)*
- *Printing All Shortages (P3118P)*
- *Printing Scheduling Information for Work Centers (P31435)*
- *Printing Supply and Demand*

3 Repetitive Manufacturing

Overview to Repetitive Manufacturing

Objectives

- To develop a workbench to schedule production
- To support production capacity and load using units per hour as well as hours per unit
- To define shop floor calendars by shift and production line
- To allow multiple replenishment points for a production line
- To allow electronic kanban control at consuming and supplying locations

About Repetitive Manufacturing

Repetitive manufacturing dedicates entire production lines to a family of products. These product families share similar components and routings. Generally these products are manufactured in a continuous process which requires less inventory movement to and from the production line. Work center setup and changeover times between related products are kept to a minimum.

Repetitive environments define production in terms of units per hour. The time spent at the operational level might or might not be important. Therefore, the ability to set up line capacity and define routings in units per hour is necessary. The fundamental basis for backscheduling and capacity planning is hours. To view information in units, the system uses a conversion factor defined at the work center level.

The driving force for repetitive manufacturing is demand. Scheduling production lines requires tools to schedule, sequence, and balance production based on the capacity for each production line.

While requirements for material is driven by demand, movement is controlled by visual cues called kanbans. Kanbans are predetermined quantities of components at specified locations on the production line. They are designed to minimize work-in-process inventories.

Complete the following tasks:

- Enter rates
- Schedule rates
- Complete rates
- Review information
- Process kanbans

- Close rates

See Also

- *Manufacturing and Distribution Planning Guide* for information about Material Requirements Planning
- *Electronic Commerce Guide* for information about Electronic Data Interchange transactions
- *Procurement Guide* for information about purchase orders

Enter Rates

Entering Rates



From Shop Floor Control (G31), choose **Repetitive Daily Processing**
From Daily Processing - Repetitive (G3115), choose **Enter/Change Rate Schedule**

Repetitive manufacturing is designed for items that you produce in a continuous process on a dedicated production line. A rate schedule is a request to complete a given quantity of an item over a period of time on a specific production line.

Rate schedules consist of a header, parts list, and routing instructions. The rate header specifies the quantity of the item requested, the required date, and the production line. The parts list and routing instructions specify the parts, operations, and resources required to complete the rate.

Use the Enter/Change Rate Schedule program to add a rate schedule. When you add a rate, the system verifies:

- Line against the Line/Item Relationship Master
- Dates against the appropriate shop floor calendar
- Effective date ranges against the defined period

Before You Begin

- Set up the processing options to automatically attach the parts list and routing when you enter a rate

3. Access the detail area.

4. Complete the following optional fields and press Enter:

- Status
- Freeze Code
- Category 1
- Category 2
- Category 3
- Bill Type
- Routing Type

Field	Explanation
Line/Cell Identifier	Defines a production line or cell. Detailed work center operations can be defined inside the line or cell.
Units - Order/Transaction Quantity	The quantity of units affected by this transaction.
Month/Week/Day/Shift	A code that determines the frequency of the schedule. Valid codes are: <ul style="list-style-type: none"> 1 Monthly 2 Weekly 3 Daily 4 Per Shift (for future use)

Field	Explanation
Shift Code	<p>A user defined code (00/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard.</p> <p>For payroll and time entry:</p> <p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p> <p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default.</p>
Status	<p>A user defined code (00/SS) that describes the status of a work order or engineering change order. Any status change from 90 thru 99 automatically updates the date completed.</p>
Freeze Code	<p>A code that indicates if the order is frozen. MPS/MRP will not plan for frozen orders.</p> <p>Valid codes are:</p> <p>Y Yes, freeze the order</p> <p>N No, do not freeze the order (Default)</p>
Category 1	<p>A user defined code (00/W1) that indicates the current stage or phase of development for a work order. You can assign a work order to only one phase code at a time.</p> <p>Note: Certain forms contain a processing option that allows you to enter a default value for this field. If you enter a default value on a form for which you have set this processing option, the system displays the value in the appropriate fields on any work orders that you create. The system also displays the value on the Project Setup form. You can either accept or override the default value.</p>
Category 2	<p>User defined code system 00, type W2, which indicates the type or category of a work order.</p> <p>Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)</p>
Category 3	<p>User defined code system 00, type W3, which indicates the type or category of a work order.</p> <p>Note: A processing option for some forms lets you enter a default value for this field. The value then displays automatically in the appropriate fields on any work orders you create on those forms and on the Project Setup form. (You can either accept or override the default value.)</p>

Field	Explanation
Bill Type	<p>A user defined code (system 40, type TB), that designates the type of bill of material. You can define different types of bills of material for different uses. For example:</p> <p>M (Default) Standard manufacturing bill</p> <p>RWK Rework bill</p> <p>SPR Spare parts bill</p> <p>The system enters bill type M in the work order header when you create a work order, unless you specify another bill type. The system reads the bill type code on the work order header to know which bill of material to use to create the work order parts list. MRP uses the bill type code to identify the bill of material to use when it attaches MRP messages. Batch bills of material must be type M for shop floor control, product costing, and MRP processing.</p>
Routing Type	<p>User defined code (system 40, type TR) that designates the type of routing. You can define different types of routing instructions for different uses.</p> <p>For example:</p> <p>M Standard Manufacturing Routing</p> <p>RWK Rework Routing</p> <p>RSH Rush Routing</p> <p>You define the routing type on the work order header. The specific type of routing defined will then be used in the work order routing.</p> <p>Product Costing and Capacity Planning systems use only M type routings.</p>

What You Should Know About

Production lines

To increase plant capacity, manufacturers run production lines for more than one shift, as well as run different lines of production on different days of the week. You specify these shifts and lines on the shop floor calendar.

You can identify up to six shifts for the production line using Manufacturing Constants, then identify all shifts for the production line by work center. After you set up the shift and line calendars, the Line Scheduling Workbench and Line Sequencing Workbench use these calendars to schedule production accordingly.

See *Setting Up the Shop Floor Calendar*.

Line/item relationship

Before you enter a rate, you can create a relationship between a line and an item.

See *Setting Up Line and Item Relationships*.

See Also

- *Creating Work Orders* for information about attaching the parts list and routing instructions interactively

Processing Options

See [Enter/Change Rate Schedule \(P3109\)](#).

Schedule Rates

Scheduling Rates

The driving force for repetitive manufacturing is demand. Scheduling production line requires tools to schedule, sequence, and balance production based on the capacity for each production line.

This section contains the following:

- [Scheduling Items on a Production Line](#)
- [Sequencing Rates by Classification Scheme or Manually](#)
- [Reviewing Production Across Lines](#)

What You Should Know About

Quality Management test results

When you manage rate based information and complete quantities to inventory, you can access Test Results Entry for items that require testing.

See *Working with Test Results* in the *Quality Management Guide* for more information.

Scheduling Items on a Production Line



From Shop Floor Control (G31), choose **Repetitive Daily Processing**
From Daily Processing - Repetitive (G3115), choose **Line Scheduling Workbench**

Use the Line Scheduling Workbench to schedule rates and work orders for the family of items produced on a production line. This workbench shows information about both firmed and planned rates and work orders, in daily buckets. After you manually manipulate the scheduled quantities, you can firm the schedule using a function key. Use start and through dates to show the work days for the production line within the date range. When you create a rate or work order, or the system creates a rate through planning, the system spreads the quantities evenly over the work days within the specified date range. From the workbench you can access:

- Alternate Line Selection
- Split Lines
- Production Status
- Item Availability

- Rate Master Schedule

Use Split lines to move scheduled quantities from one line to another by:

- Splitting production among two lines, which may create a rate on the new line
- Consolidating production from two lines to one line
- Transferring production from one line to another

Use Alternate Line Selection to view all lines for which line/item relationships exist for the item.

To schedule items on a production line

On Line Scheduling Workbench

Item	Shift	06/12/17	06/13/17	06/14/17	06/15/17	06/16/17
2031	1	32	32	32	32	32
2032	1	00	00	00	00	00
2033	2	00	00	00	00	00

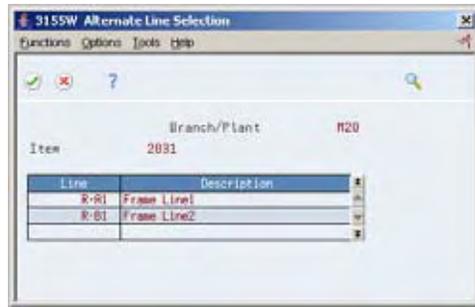
Capacity	06/12/17	06/13/17	06/14/17	06/15/17	06/16/17
Capacity	200	200	200	200	200
Percent Used	16%	16%	16%	16%	16%
Available	168	168	168	168	168
Cumulative Available	168	168	168	168	168

Opt: 1=Split 2=Alt F5=Update F10=Refresh F11=Cap Toggle F24=More

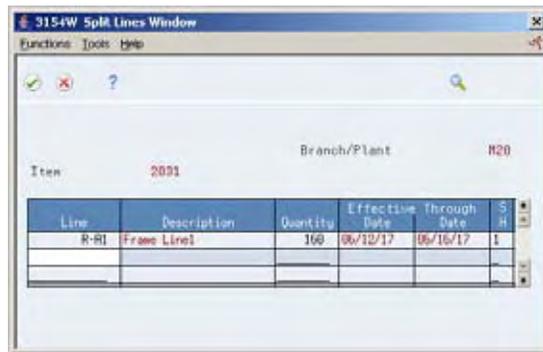
1. Complete the following fields:
 - Line
 - Branch/Plant
2. Complete the following optional fields:
 - Start Date
 - Through Date
3. Change any scheduled quantity as needed.

If you change the total quantity and update the schedule, the system shows a soft error and then spreads the new quantity evenly across the date range. You must update the schedule using a function key before the system changes the record.

4. Enter a 2 next to the appropriate item.



5. On Alternate Line Selection, review the following fields:
 - Item
 - Revision
6. Enter a 1 in the following field next to the appropriate line:
 - Option

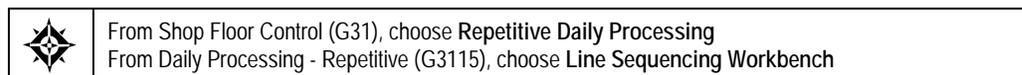


7. On Split Lines, complete the following fields to move scheduled quantities from one line to another:
 - Line
 - Quantity
 - Shift

Processing Options

See [Line Scheduling Workbench \(P3153\)](#).

Sequencing Rates by Classification Scheme or Manually



Use the Line Sequencing Workbench to sequence the rates after you schedule production. This workbench only shows information about actual rates, in daily buckets. Set the processing options if you want the system to sequence quantities across shifts, or across both shifts and days. You must update the schedule using a

function key before the system changes the record. You can sequence the rates, using function keys, by:

- Category code
- Sequence number

To sequence the rates by the items' category codes, you use a function key. (The category code values are determined by the setup in the processing options for the Enter/Change Rate Schedule.) Beginning with the first shift and day, you forward schedule the quantities, which consumes the available capacity. You use the processing options to control whether these quantities are pulled forward or pushed back in time across shifts only, or both shifts and days. This process places the scheduled quantities which exceed the capacity available, within the date range selected, in the last shift of the last day.

To sequence the rates by sequence number, you use a different function key. Again, beginning with the first shift and day, you forward schedule the quantities, which consumes the available capacity. When created, a new rate has an initial sequence number of all nines. This causes it to be sequenced last for the shift, therefore placing it after any previously sequenced rates. This default sequence may then be overridden manually, if desired. You do this by changing the sequence number value. After manipulating the sequence, you can update the schedule as is, or use the function key to forward schedule again.

To schedule rates by classification scheme

On Line Sequencing Workbench

Seq	Item Number	Date	Sh	MO/Rate	Ty	Plan Qty	UR	Load %
10.00	2031	06/12/17	1	374467	SC	32	EA	
20.00	2032	06/12/17	1	374521	SC	80	EA	
30.00	2033	06/12/17	2	374678	SC	66	EA	
40.00	2031	06/13/17	1	374467	SC	32	EA	
50.00	2032	06/13/17	1	374521	SC	80	EA	
60.00	2033	06/13/17	2	374678	SC	66	EA	
70.00	2031	06/14/17	1	374467	SC	32	EA	
80.00	2032	06/14/17	1	374521	SC	80	EA	
90.00	2033	06/14/17	2	374678	SC	66	EA	
100.00	2031	06/15/17	1	374467	SC	32	EA	
110.00	2032	06/15/17	1	374521	SC	80	EA	
120.00	2033	06/15/17	2	374678	SC	66	EA	
130.00	2031	06/16/17	1	374467	SC	32	EA	
140.00	2032	06/16/17	1	374521	SC	80	EA	

1. Complete the following fields:

- Line/Cell
- Branch/Plant

2. Complete the following optional fields and press Enter:
 - From Date
 - Through Date
3. To change the sequence of the rate, complete the following fields as needed:
 - Sequence

Processing Options

See [Line Sequencing Workbench \(P3156\)](#).

Reviewing Production Across Lines

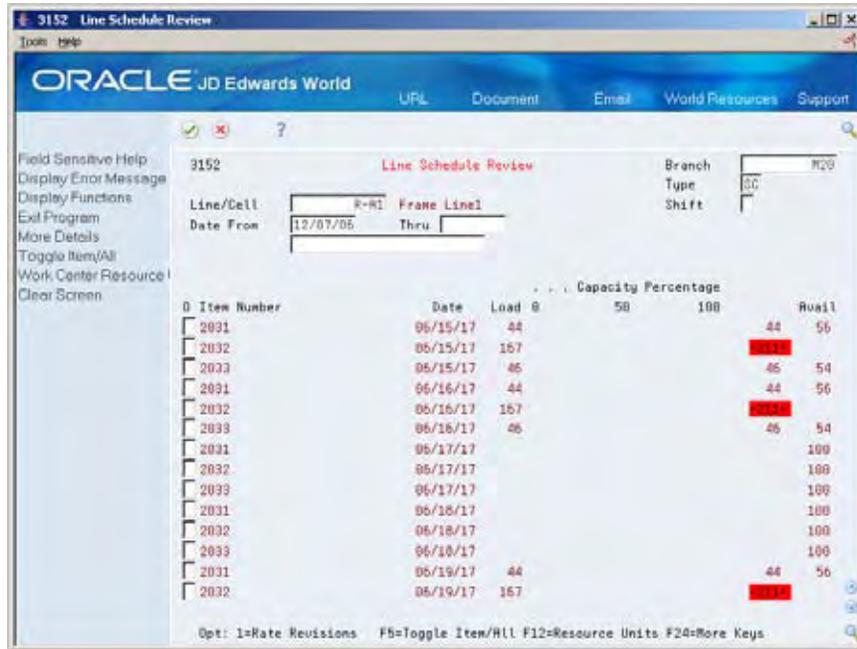
	From Shop Floor Control (G31), choose Repetitive Daily Processing From Daily Processing - Repetitive (G3115), choose Line Schedule Review
---	--

Use Line Schedule Review to view the schedule of the production lines for the family of items produced. If items are produced on multiple production lines, use this workbench to view production across lines while staying within each line's capacity. You can toggle the information shown between an item and all items:

- Item mode – the load column represents the capacity consumed by rates for that item.
- All items mode – the load column represents the capacity consumed by the mix of items' rates in effect.

To review production across lines

On Line Schedule Review



1. Complete the following fields:
 - Line/Cell
 - Branch
2. Complete the following optional fields and press Enter:
 - Date From
 - Date Through
3. Review the information.

Processing Options

See [Schedule Review \(P3152\)](#).

Complete Rates

Completing Rates



From Shop Floor Control (G31), choose **Repetitive Daily Processing**
From Daily Processing – Repetitive (G3115), choose **Completions Workbench**

Use Completions Workbench to record rate or work order completions, issue parts, and record hours and quantities for the rate or work order. Depending on how you set the processing options, the Inventory Issues and Hours and Quantities forms appear as you complete rates or work orders.

When you perform a completion, the system records the inventory as received and updates all required Inventory Management system tables. The system adds the quantity that is completed to the quantity on hand for the location that you indicate.

Before You Begin

- Set the processing options to access the Issues and Hours and Quantities programs

What You Should Know About

Quality Management test results

When you manage rate based information and complete quantities to inventory, you can access Test Results Entry for items that require testing.

See *Working with Test Results* in the *Quality Management Guide* for more information.

To complete rates

On Completions Workbench

3119 Completions Workbench

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Item Ledger Review
Clear Screen

3119 Completions Workbench Branch/Plant R20
Document Type SC

Action Code
Item Number
Production Line R-01 Frame Line1
Effective From Thru
Status From Thru

Op	Item Number	Quantity	UM	Completed	Scrapped	Date	Shift
	2032	400	EA			12/19/05	
	2033	200	EA			12/19/05	
	2031	160	EA			12/19/05	

Opt: 1=WD/Rates 2=Hrs/Qty 3=Issues 4=Completion F24=More Keys

1. Complete the following fields:

- Branch/Plant
- Document Type
- Item Number
- Quantities Completed
- Quantities Scrapped
- Date Complete
- Shift

2. Access the detail area.

3119 Completions Workbench

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Item Ledger Review
Clear Screen

3119 Completions Workbench Branch/Plant
Document Type. CC

Action Code C
Item Number 2031
Production Line R-R1 Frame Line
Effective From Thru
Status From Thru

Op	Item Number	Quantity	UM	Completed	Scrapped	UM	Complete \$	Date
	2031	100	EA	1				6/12/17

Steel Frame, Tearing
Line/Cell R-R1 Frame Line1 Location
Eff From: 06/12/17 Thru 06/16/17 Lot/SN
Document: 374467 CC Employee 6001
Total Completed 1 Status 45
Total Scrapped Period Weekly

Line/Cell
Eff From: Thru
Document:
Total Completed
Total Scrapped
Location
Lot/SN
Employee
Status
Period

Opt: 1=90/Rates 2=Hrs/Qty 3=Issues 4=Completion F24=More Keys

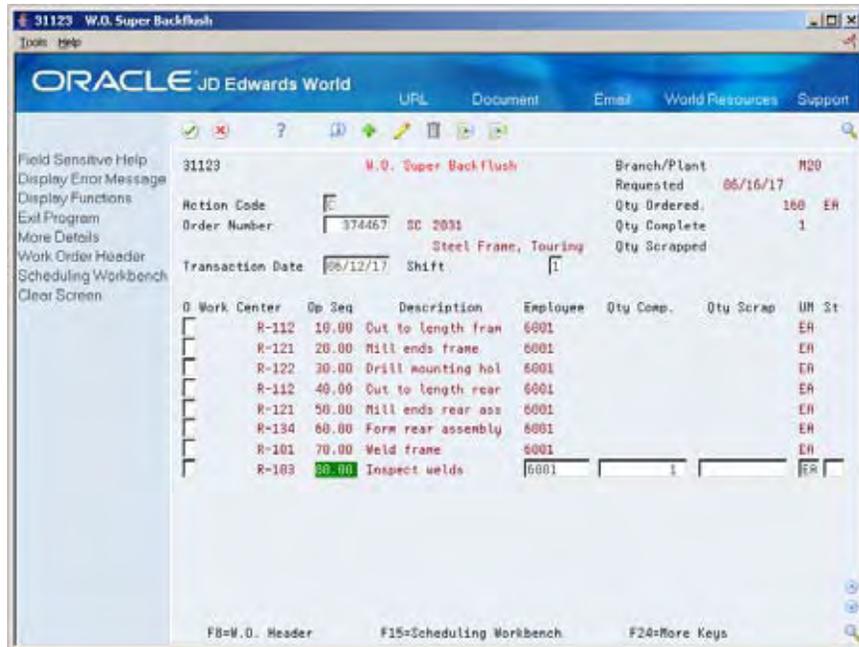
3. Complete the following field:

- Employee Number

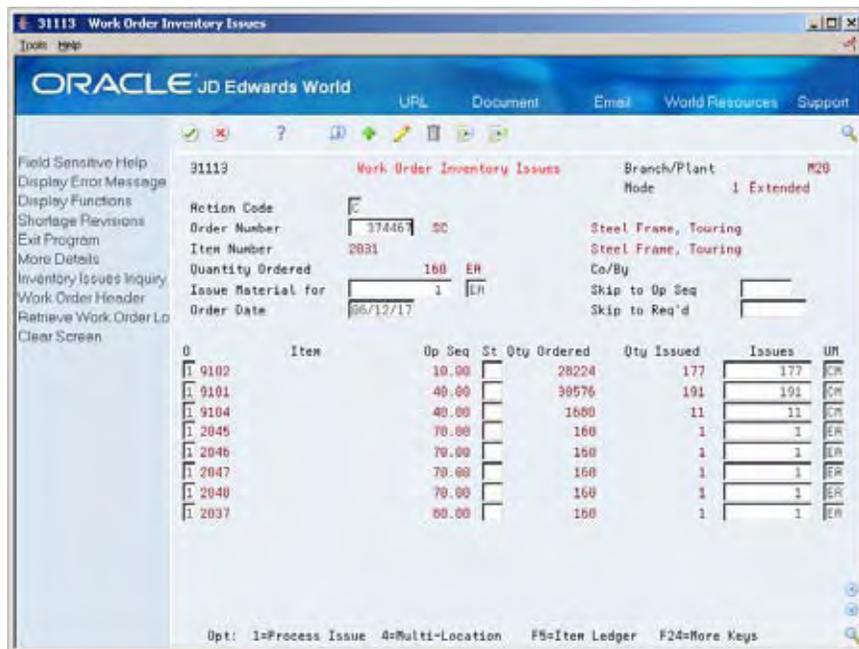
4. Complete the following optional fields and press Enter:

- Location
- Lot/Serial Number
- Status

5. On Super Backflush, press Enter.



6. On Inventory Issues, press Enter.



7. On Hours & Quantities Entry, complete the following fields and press Enter:

- Employee
- Operations Sequence Number
- Type of Hours
- Hours
- Unit of Measure

- Operation Status

311221 W.O Time Entry

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
Values List
Scheduling Workbench
Exit to Name Search
On-Line Hours & Quant
Production Status
Clear Screen

311221 W.O Time Entry Batch Number 3722
Work Date 06/12/17

Action Code
Order Number/Rate 374467 SG
Item Number 2631 Steel Frame, Touring

Employee	Op Number	Op Seq	H	T	Time Begin	Time Ending	Hours	Quantity	UM	St	Emp. Name
5001	10.00	1			00:00:00	00:00:00	.15				Allen, Rau
5001	10.00	1			00:00:00	00:00:00	.15				Allen, Rau
5001	10.00	2			00:00:00	00:00:00	.00				Allen, Rau
5001	10.00	3			00:00:00	00:00:00	.15				Allen, Rau
5001	10.00	3			00:00:00	00:00:00	.15				Allen, Rau
5001	10.00	4			00:00:00	00:00:00			1	LN	Allen, Rau
5001	10.00	4			00:00:00	00:00:00			1	ER	Allen, Rau
5001	20.00	1			00:00:00	00:00:00	.15				Allen, Rau
5001	20.00	1			00:00:00	00:00:00	.15				Allen, Rau
5001	20.00	2			00:00:00	00:00:00	.00				Allen, Rau
5001	20.00	3			00:00:00	00:00:00	.15				Allen, Rau
5001	20.00	3			00:00:00	00:00:00	.15				Allen, Rau

F4=Fold F5=Sch WB F9=Name Search F10=Hrs. & Qty Update F24=More Keys

8. Revise the following fields as needed:

- Actual Setup
- Actual Labor
- Actual Machine

Processing Options

See [Completions Workbench \(P3119\)](#).

See [Super Backflush \(P31123\)](#).

See [Work Order Time Entry \(P311221\)](#).

Review Information

Reviewing Information

You can review the status of rates and work orders, records for entries of completion and scrap at an operation, and planned and remaining quantities for all items scheduled through a particular production line.

This section contains the following:

- [Reviewing Production Status](#)
- [Reviewing Production History](#)
- [Reviewing Line Dispatch List](#)

Reviewing Production Status



From Shop Floor Control (G31), choose **Repetitive Daily Processing**
From Daily Processing - Repetitive (G3115), choose **Production Status**

Use Production Status to view the status of all rates and work orders by work center/line, work order, rate schedule number, or item number as qualified by the status and date ranges. The program shows historical information as well as open rates and work orders.

From Production Status you can access Production History, where you can view the transactions for each entry of completions and scrap at an operation. The history program shows all transactions that made up the scrapped quantities and the details of these past transactions.

To review production status

On Production Status

Op	Start Date	Req Date	Qty Remaining	UM
333	09/28/06	10/09/17	11	EA
4133	12/29/14	01/02/15	0	EA
3999	12/29/14	01/02/15	0	EA
3980	12/29/14	01/02/15	0	EA
3901	12/29/14	01/02/15	0	EA
3902	12/29/14	01/02/15	0	EA
443	01/05/15	01/09/15	0	EA
3901	03/22/15	03/30/15	0	EA
3980	03/23/15	03/30/15	0	EA
3902	03/23/15	03/30/15	0	EA
4133	03/26/15	03/30/15	0	EA
3999	03/27/15	03/30/15	0	EA

F5=Order Completion 1=Production History 2=Line Dispatch List F24=More

- Complete one or a combination of any two, of the following fields:
 - Work Center/Line
 - Item
 - Order Number
- Complete the following field and press Enter:
 - Branch/Plant
- Review the information.

Processing Options

See [Production Status \(P31226\)](#).

Reviewing Production History



From Shop Floor Control (G31), choose **Repetitive Daily Processing**
 From Daily Processing - Repetitive (G3115), choose **Production History**

To review production history

On Production History

Op Seq	Trn Date	Order No	Tj	Quantity	UM	Completed	Scrapped
10.00	11/25/13	113478	W0	8548	ER	8548	

1. Complete one or a combination of any two, of the following fields:
 - Work Center/Line
 - Item Number
 - Order Number
2. Complete the following field and press Enter:
 - Branch/Plant
3. Review the information.

Processing Options

See [Production History \(P31227\)](#).

Reviewing Line Dispatch List

	From Shop Floor Control (G31), choose Repetitive Daily Processing From Daily Processing - Repetitive (G3115), choose Line Dispatch List
--	--

Use Line Dispatch List to view the planned and remaining quantities for all items scheduled through a particular production line.

To review line dispatch list

On Line Dispatch List

3159 Line Dispatch List

ORACLE JD Edwards World

UPL Document Email World Resources Support

Field Sensitive Help
Display Error Message
Display Functions
Exit Program
More Details
Clear Screen

3159 Line Dispatch List Branch/Plant: P20

Line/Cell: B-R1 Frame Line1
Effective From: 05/15/17 Thru: 05/18/17
Status From: Thru:
Shift:

Line/Cell	Date	Seq	Item Number	Plan Qty	UN	Hours	Quantity
	06/15/17	1 999.99	2031	32	EA	3.55	32
	06/15/17	1 999.99	2032	80	EA	13.33	80
	06/15/17	2 999.99	2033	66	EA	3.66	66
	06/16/17	1 999.99	2031	32	EA	3.55	32
	06/16/17	1 999.99	2032	80	EA	13.33	80
	06/16/17	2 999.99	2033	66	EA	3.66	66
	06/17/17	1 999.99	2031	32	EA	3.55	32
	06/17/17	1 999.99	2032	80	EA	13.33	80
	06/17/17	2 999.99	2033	66	EA	3.66	66
	06/18/17	1 999.99	2031	32	EA	3.55	32
	06/18/17	1 999.99	2032	80	EA	13.33	80
	06/18/17	2 999.99	2033	66	EA	3.66	66

Opt: 1=Production Status F3=Exit F24=More Keys

1. Complete the following fields and press Enter:
 - Line/Cell
 - Branch/Plant
2. Review the information.

3. Access the detail area.

Line/Cell	Effective From	R-R1	Frame Line1	Thru	Status From	Thru	Shift	Item Number	Plan Qty	UR	Hours	Quantity
06/15/17 1 999.99	06/15/17			06/16/17				2031	32	ER	3.55	32
			Steel Frame, Touring									
			Standard Qty					32				
			Actual Qty									10
			Variance					32.00				
06/15/17 1 999.99	06/15/17							2032	80	ER	13.33	80
			Steel Frame, Mountain									
			Standard Qty					80				
			Actual Qty									10
			Variance					80.00				
06/15/17 2 999.99	06/15/17							2033	66	ER	3.66	66
			Steel Frame, Youth									
			Standard Qty					66				
			Actual Qty									10
			Variance					66.00				

4. Review the information.

Processing Options

See [Line Dispatch List \(P3159\)](#).

Process Kanbans

Processing Kanbans

While the requirements for material is driven by demand, the movement is controlled by visual cues called kanbans. Kanbans are predetermined quantities of components at specified locations on the production line. They are designed to minimize work-in-process inventories. One program with two screen formats manage the electronically implemented kanbans.

This section contains the following:

- [Processing Kanban Consumption by Item](#)
- [Processing Kanban Supply by Item](#)
- [Processing Kanban Status Override](#)

Use the consumption program to access kanbans at a consuming location, and the supply program to access kanbans at a supplying location, by specifying one or any two of the following criteria:

- Item
- Location
- Supplier
- Kanban identification

You process kanbans in one of two modes:

- One-Phase
- Two-Phase

One-Phase

One-phase assumes the completion and transfer to the consuming location are performed in one step, in which you complete the quantity directly to the consuming location and change the kanban status to checked-in (1).

Two-Phase

Two-phase assumes the completion and transfer are performed separately. You complete the quantity to the supplying location and change the kanban status to completed (3). After the quantity has physically been received at the consuming location, a transfer from the supplying location to the consuming location occurs and the kanban status is changed to checked-in (1).

If you check in a kanban quantity from the supplier, the system can initiate a receipt transaction if the kanban master flag is on.

You can process kanbans for items that are:

- Inventoried
- Manufactured (sub-assemblies/phantoms)
- Externally supplied

Inventoried Items Processing

When you check out a kanban that is inventoried, the kanban status is changed. The supplying location replenishes the kanban quantity. You then complete and check in the kanban, which results in an inventory transfer transaction.

Manufactured Processing

When you check out a kanban that is manufactured, the program either creates a work order, or looks for an existing rate. It bases its action on the items' order policy code. (If the system does not find a rate, it creates one.) When the system creates a rate, it automatically attaches the parts list and routing. When you check in the kanban, you complete the work order or rate, issue parts, enter hours and quantities, and transfer the parent item to the consuming location.

Manufactured Processing - Phantom Item

When you check out a kanban supplied by a work center/production line, and the item is a phantom, no transactions outside of inventory transfers occur. There are no work orders or rates to process; the item is simply replenished by the producing line and the kanban is completed and checked in. This results in an inventory transfer transaction, from the supplying location to the consuming location.

Externally Supplied Processing

When you check out kanbans from an external supplier, the system may create a new purchase order, or use an existing one. However, there must be an open purchase order for the item. In addition, when you check out the kanban, the system may also initiate an Electronic Data Interchange (EDI) transaction. When you check in kanbans from an external supplier, the system may optionally perform a receipt against the purchase order.

Processing Kanban Consumption by Item

	From Shop Floor Control (G31), choose Repetitive Daily Processing From Daily Processing - Repetitive (G3115), choose Kanban Consumption
---	--

Kanban Consumption allows you to access all kanbans at a given consuming location. After you locate your items, depending on the status of each item, you can make one of the following status changes at a consuming location:

- Checked-in (1)
- Checked-out (2)

To process kanban consumption by item

On Kanban Consumption

Item Number	Kanban ID	Card No.	Sts	Quantity	UH	Typ	Kanban #
2047	745	1	2	30	EA	2	
2047	746	1	2	30	EA	2	

Opt: 1=Check In 2=Check Out 9=Cancel Kanban F24=More Keys

1. Complete the following fields:

- Item Number
- Branch/Plant

2. Access the detail area.

3. To check in the item, enter a 1 in the following field next to the item number:
 - Option
 - Quantity may also be modified
4. Complete the following fields if checking in a kanban that was supplied by the production line which included the creation of a rate or work order:
 - Employee Number
 - Shift
5. To check out the item, enter a 2 in the following field next to the item number:
 - Option

Processing Options

See [Kanban Consumption/Supply \(P3157\)](#).

Processing Kanban Supply by Item

	From Shop Floor Control (G31), choose Repetitive Daily Processing From Daily Processing - Repetitive (G3115), choose Kanban Supply
---	---

Kanban Supply allows you to access all kanbans that need replenishment for items stored or produced at a given supplying location. After you locate your items, depending on the status of each item, you can make one of the following status changes at a supplying location:

- Checked-in (1)

- Completed (3)

Inventory and statuses are affected as follows:

- One-phase – inventory is immediately received and available at the consuming location, and the status is changed to checked-in (1).
- Two-phase – the completion and transfer are reported separately:
 - The quantity is completed to the supplying location, the kanban status is changed to a complete (3).
 - After the quantity has physically been received at the consuming location, a transfer is performed from the supply location to the consuming location and the kanban status is changed to checked-in (1).

To process kanban supply by item

On Kanban Supply

Item Number	Kanban ID	Card No.	Sts	Quantity	UM	Typ	Kanban #
2037	725	1	2	30	EA	1	
2037	726	1	2	30	EA	1	

1. Complete the following fields:

- Item Number
- Branch/Plant

2. Access the detail area.

Kanban ID	Card No.	Qty	Quantity	UH Typ	Src Related Kanban #
2037	725	1 2	30	EA 1	M20
2037	726	1 2	30	EA 1	M20

3. To check in the item, enter a 1 in the following field next to the item number:
 - Option
 - Quantity may also be modified
4. Complete the following fields if checking in a kanban that was supplied by the production line which included the creation of a rate or work order:
 - Employee Number
 - Shift
5. To complete the item, enter a 3 in the following field next to the item number:
 - Option
 - Quantity may also be modified

To cancel a kanban

On Kanban Consumption

Item Number	Kanban ID	Card No	Sts	Quantity	UM	Src Related
2037	725	1	2	30	EA	1
2037	726	1	2	30	EA	1

1. Complete the following fields:
 - Item Number
 - Branch/Plant
 - Kanban ID (optional)
2. Press Enter.
3. Enter a 9 in the following field next to the item number:
 - Option
4. Press Enter to display a confirmation message.
5. Enter a Y in the field next to the confirmation message:

Processing Options

See [Kanban Consumption/Supply \(P3157\)](#).

Processing Kanban Status Override

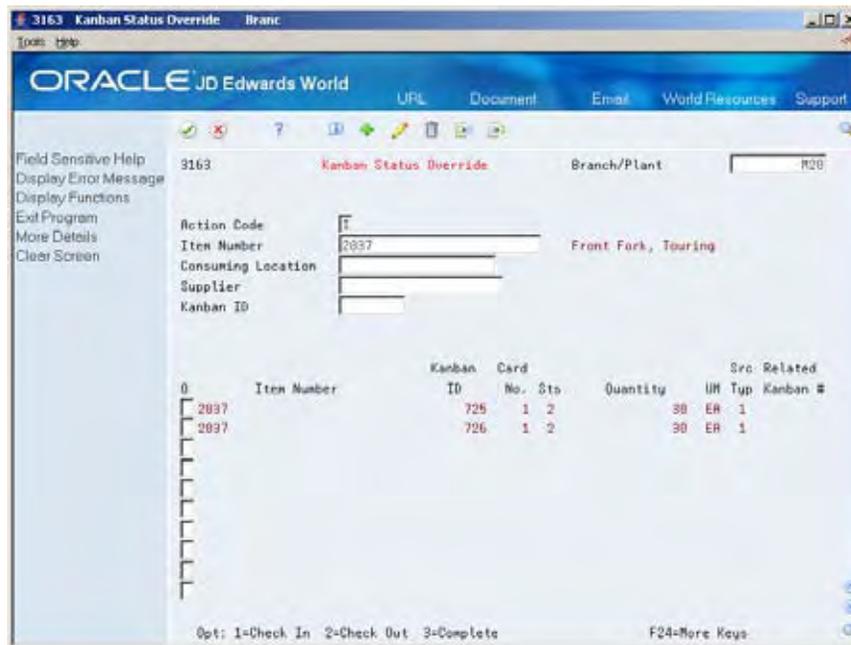
	From Shop Floor Control (G31), enter 27 From Advanced Shop Floor Control (G3131), choose Kanban Status Override
---	---

Should you find that a kanban card is not at the correct status, you can bypass normal kanban processing and change the status using the Kanban Status Override program (P3163). This will only update the status on the kanban and not perform any associated processing. This program has been placed on an advanced menu since it should only be used for remedial purposes by authorized users.

If all kanban card records are updated to the same status, the program will also update the status on the Kanban Master record.

To process kanban status overrides

On Kanban Status Override



Item Number	Kanban ID	Card No.	Sts	Quantity	WH	Typ	Src	Related Kanban #
2037	725	1	2	30	ER			1
2037	726	1	2	30	ER			1

Opt: 1=Check In 2=Check Out 3=Complete F24=More Keys

1. Complete the following field:

- Option

You can use the processing options to control which status codes the program is allowed to update.

Processing Options

See [Kanban Status Override \(P3163\)](#).

Close Rates

Closing Rates



From Shop Floor Control (G31), enter 27
From Advanced Shop Floor Control (G3131), choose Close Rates

Use the Close Rates program to close rate schedules if the:

- Status is greater than or equal to the value specified in the processing options
- Effective through date is less than or equal to the date specified in the processing options

When you close rates, the system:

- Purges the rate schedule data from the Quantity Detail table
- De-commits any quantities for the applicable rates

See Also

- *Purge Work Orders* for information about purging data

Processing Options

See [Batch Rate Close \(P3191\)](#).

4 System Setup

Overview to System Setup

Objectives

- To set up the required data in the Shop Floor Control system
- To understand how the system uses the data

About System Setup

Shop Floor Control requires some setup prior to using the system. Setup for Shop Floor Control includes codes needed for work orders, such as priority, status, and category codes. As well as, information needed for discrete and repetitive manufacturing, such as employee labor rates, shop floor calendar, and work centers.

To set up your Shop Floor Control system, complete the following tasks:

- Set up work order codes
- Set up manufacturing information

Before You Begin

- Set up the following records in the Inventory Management system:
 - Item Master
 - Branch/Plant

See Also

- *Technical Foundation Guide* for information on defining user defined codes
- *Inventory Management Guide* for information on setting up the Item Master, Branch/Plant, and Lot Master records

Set Up Work Order Codes

Setting Up Work Order Codes

You need to define certain user-defined codes for your manufacturing work orders.

Setting up work order codes includes the following steps:

- [To set up type codes](#)
- [To set up priority codes](#)
- [To set up status codes](#)
- [To set up phase codes](#)
- [To set up category codes](#)
- [To set up operation status codes](#)
- [To set up document type codes](#)

See Also

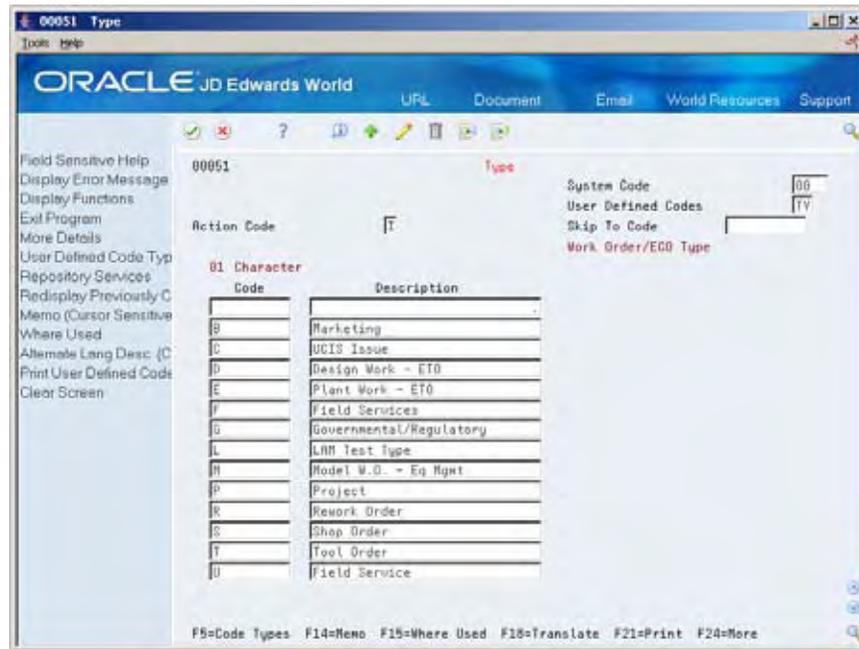
- *Creating Work Orders (P48013)*

To set up type codes

	From Shop Floor Management (G31), choose Shop Floor Control Setup From Shop Floor Control Setup (G3141), choose Type
---	---

Work order type codes (00/TY) indicate the type classification of a work order. For example, a rework order might be type R and a design order might be type D.

On Type



Complete the following fields:

- System Code
- User-defined Code
- Character Code
- Description
- Description-2

Field	Explanation
System Code	A user-defined code (98/SY) that identifies a JD Edwards World system.
User-defined Codes	Identifies the table that contains user-defined codes. The table is also referred to as a code type.
Code	This column contains a list of valid codes for a specific user-defined code list. The number of characters that a code can contain appears in the column title.
Description	A user-defined name or remark.
Description-2	Additional text that further describes or clarifies a field in JD Edwards World systems.

To set up priority codes



From Shop Floor Management (G31), choose **Shop Floor Control Setup**
From Shop Floor Control Setup (G3141), choose **Priority**

Work order priority codes (00/PR) indicate the priority of a work order in relation to other work orders. These codes are for reference only and do not affect the scheduling or planning of work. They should not be used as your formal work priority system.

On Priority

Code	Description
H	High
L	Low
R	Red
1	Emergency
2	Urgent
3	Normal - RGRP
4	Low Priority

Complete the following fields:

- System Code
- User-defined Code
- Character Code
- Description

To set up status codes



From Shop Floor Management (G31), choose **Shop Floor Control Setup**
From Shop Floor Control Setup (G3141), choose **Status**

Work order status codes (00/SS) describe the status or the current step in the process of implementing a work order. You can prevent certain transactions from occurring based on the status of a work order. For instance, the system can hold work orders whose status indicates they are pending approval or quality inspection, and release work orders that have a status code indicating they have been approved or passed quality inspection. In addition, you can set the system to automatically update the work order status code when you enter issue and completion transactions.

On Status

Code	Description	Description-2
A	Approved ECO	
A1	Additional data required (ECO)	
A1	Entered	UCIS/WO
D	Disapproved ECO	
EM	Emergency Order	
E1	ECO Entered	
E2	Preliminary Workup	
E3	Approval Pending	
E4	ECO Approved	
E5	ECO Implemented	
IA	Inactive Work Order	
W1	Scheduled	UCIS/WO
M	Maintenance Work Request	

Complete the following fields:

- System Code
- User-defined Code
- Character Code
- Description

To set up phase codes

	From Shop Floor Management (G31), choose Shop Floor Control Setup From Shop Floor Control Setup (G3141), choose Phase
--	--

Work order phase codes (00/W1) indicate the implementation phase of the work order. You can use phase codes to group families of orders for project management, cost accounting, and inquiry purposes. For example, if inspection on the internal parts of a product is not possible beyond a certain point in its production, you can divide the routing into phases. You can then use the phase code to indicate availability of the product for the next level of inspection.

On Phase

Code	Description	Description-2
1	Project Phase 1	
2	Project Phase 2	
3	Project Phase 3	
4	Project Phase 4	
	Std. JDE Phase Codes	
0	Credits and Adjustments	
8	Changes in Project Scope	
E	Reimbursable Expenses	
H	Hardware/Software Installation	
K	General Consultation	
M	Project Administration	
T	Travel Time	

Complete the following fields:

- System Code
- User-defined Code
- Character Code
- Description

To set up category codes

	<p>From Shop Floor Management (G31), choose Shop Floor Control Setup From Shop Floor Control Setup (G3141), choose Category Code 02</p>
---	--

Work order category codes 02 and 03 can represent any category or description by which you want to group work orders for project management, cost accounting, or inquiries. For example, you can set up one category code to represent types of problems encountered in the work order implementation, such as improper startup or inadequate maintenance, and another code to represent locations where the work is taking place.

On Category Code 02

03 Character	Code	Description	Description-2
	F1	Inproper Start-Up or Operation	
	F2	Inproper Installation/Repair	
	F3	Inadequate Preventive Maint	
	F4	Material or Corrosion Problem	
	F5	Lubrication or Cooling Problem	
	F6	Out of Balance or Alignment	
	F7	Duty or Plugged Up	
	F8	Normal Wear	
	F9	Design of Equipment	
	PN1	Paint Shop	
	100	Machine Shop	
	101	Drill Press	
	102	Milling Machine	

Complete the following fields:

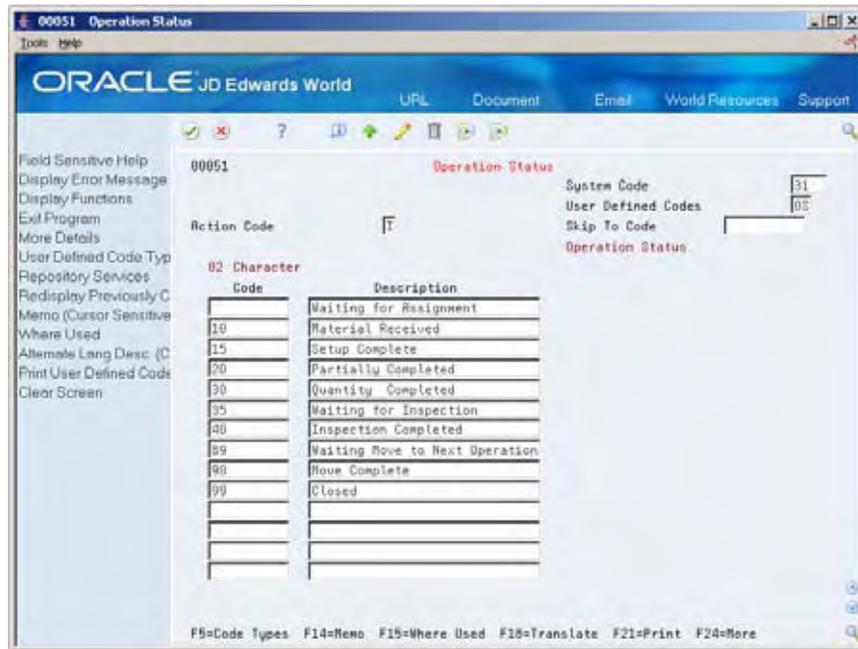
- System Code
- User-defined Code
- Character Code
- Description

To set up operation status codes

	<p>From Shop Floor Management (G31), choose Shop Floor Control Setup</p> <p>From Shop Floor Control Setup (G3141), choose Operation Status</p>
--	--

Work order operation status codes (31/OS) indicate the progress or status of an order during the steps followed in a particular operation. For example, you can set up codes to indicate if materials have been received or work begun at a particular operation. This allows management to monitor the progress of operations that have longer run times, or shop floor personnel to indicate when items are ready to move to the next operation.

On Operation Status



Complete the following fields:

- System Code
- User-defined Code
- Character Code
- Description

To set up document type codes



From any menu, enter UDC in the command line

You can categorize your work orders by document type using user-defined codes (00/DT). For example, you can define document type codes to indicate rework orders, prototype orders, or repair orders. If you do not specify a document type on a new work order, the system enters a document type of WO (Firm Work Order).

Document types are used to categorize information across your JD Edwards World systems. You can specify up to 12 document types to be used for work orders and rates in supply/demand calculations by entering them in the processing options for the Supply/Demand Inclusion Rules in the Manufacturing Planning system. The Manufacturing Accounting system uses the document type to match the document types defined in your automatic accounting instructions (AAIs) when you post journal entries to the general ledger.

On General User-defined Codes

00051 General User Defined Codes

System Code: 00
User Defined Codes: 07
Skip To Code: I
Document Type - All Documents

Code	Description	Description-2
I	Inu Cnu - Issues	
IA	Inventory Adjustments	
IB	Item Cost Changes	Hard Coded
IC	Completed W.O.'s To Inventory	
IH	Labor Charged To W.O.'s	
II	Inventory Issue	
IJ	Inventory Adjustments	
IL	Inventory Issue	
IM	Material Charged To W.O.'s	
IO	Component Scrap to W.O.'s	
IQ	Inventory Quantity Only	Hard Coded in Inventory
IR	Inventory Receipt	
IS	Scrapped W.O.'s To Inventory	
IT	Inventory Transfers	

F5=Code Types F14=Memo F15=Where Used F18=Translate F21=Print F24=More

- Complete the following fields to locate document types:
 - System Code
 - User-defined Code
- Complete the following fields to set up new document type codes:
 - Character Code
 - Description

Processing Options

See [User Defined Codes \(P00051\)](#).

Set Up Manufacturing Information

Setting Up Manufacturing Information

Set up the information that is needed for discrete and repetitive manufacturing, such as user defined codes, work day calendars, and constants.

This section contains the following:

- [Setting Up Standard Procedures](#)
- [Setting Up Employee Labor Rates](#)
- [Setting Up the Shop Floor Calendar](#)
- [Setting Up Manufacturing Constants](#)
- [Setting Up Work Centers](#)
- [Setting Up Resource Units](#)
- [Setting Up Line and Item Relationships](#)

Setting Up Standard Procedures



From Shop Floor Management (G31), enter 29
From Shop Floor Control Setup(G3141), choose **Standard Procedures**

You can set up generic messages (48/SN) that represent procedural or message text for your company. Use them to describe a standard procedure for each step in a routing.

The description you define for the code prints on shop floor documents and appears in online inquiries that access data on Enter/Change Routing.

What You Should Know About

Indicating the procedure to use for routings After you define standard procedure codes, you can enter them in the Standard Description field on Enter/Change Routing to indicate the procedure to use for each routing operation.

3. On General Message, complete the following fields to add a message to the code you selected:
 - Message Number
 - Message

Processing Options

See [Generic Rate/Message Records Program \(P00191\)](#).

Setting Up Employee Labor Rates



From Shop Floor Management (G31), enter 29
From Shop Floor Control Setup(G3141), choose **Employee Labor Rates**

Employee labor rate codes are generic rates (31/ER) that represent hourly labor rates for your employees. The rate that you define for each employee appears in the Employee Rate field on the Hours and Quantities Entry form when the employee enters time transactions. For each code, you can define the name or type of employee that the code represents and the hourly labor rate for the employee or job category.

To set up employee labor rates

On Employee Labor Rates

Code	Description	Rate
00006001	Allen, Ray	7.7200
00006002	Abbot, Dominique	12.2500
00006003	Akin, Dwight	11.1400
00006010	Assembly line worker	25.0000
00006015	Assembly line Supervisor	50.0000
00006016	f	3.0000
00006017	f	4.0000
00006018	f	5.0000
00006019	f	6.0000
00006020	f	7.0000
00006021	h	8.0000
00006022	e	9.0000
00006023	p	10.0000
00006024	e	11.0000
00006025	g	12.0000

Complete the following fields:

- Character Code

- Description
- Rate

Field	Explanation
Rate	A code used to define rate information in the General Rate/Message Records table (F00191).

Processing Options

See [Generic Rate/Message Records Program \(P00191\)](#).

Setting Up the Shop Floor Calendar

	From Shop Floor Management (G31), enter 29 From Shop Floor Control Setup(G3141), choose Shop Floor Calendar
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You can define the work days by month and year for each branch or all branches in your system in the Shop Floor Calendar. The system uses this calendar to determine manufacturing schedules.

You can also define calendars by shift and name. The system uses these calendars for line sequencing by shift in repetitive manufacturing.

To increase plant capacity, manufacturers run production lines for more than one shift, as well as run different lines of production on different days of the week. You specify these shifts and lines on the Shop Floor Calendar.

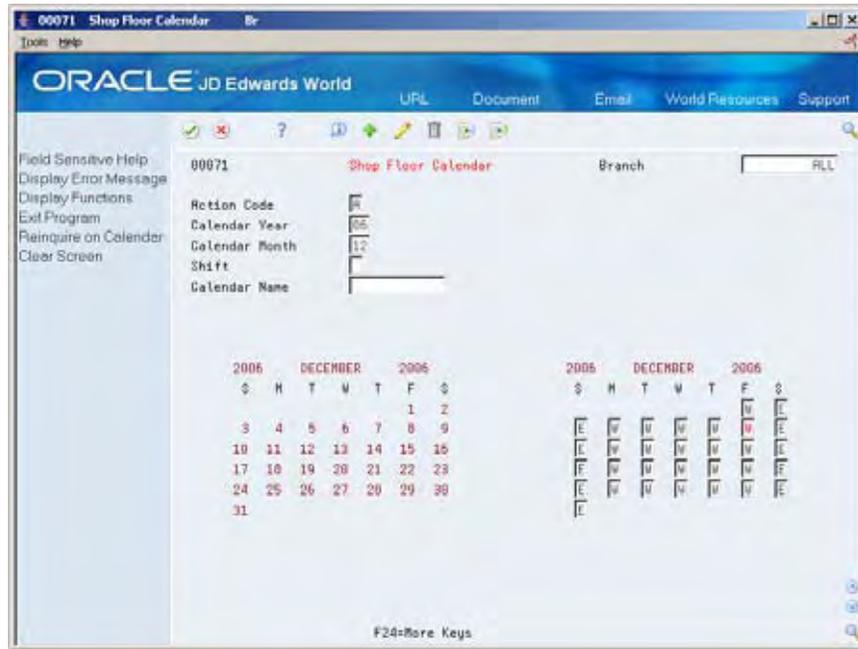
What You Should Know About

- Deleting a branch calendar** If you delete a branch calendar for a month and year, the calendar record no longer exists. However, if you locate a month and year that does not exist, it appears with default values. You can then add the record.
- System defaults** If the shop calendar for the branch, month, and year are not yet defined, the system preloads default work days (Monday through Friday) and weekends (Saturday and Sunday). Holidays are always user defined.
- Shift calendars** Shift calendars are not used for DRP/MPS/MRP.

To set up the shop floor calendar

You set up a calendar month by locating the month, year, and branch, and entering any different day types.

On Shop Floor Calendar



Complete the following fields:

- Branch
- Calendar Year
- Calendar Month
- Shift (for repetitive manufacturing)
- Line (for repetitive manufacturing)
- Type of Day

The calendar on the left shows the actual calendar days for the month and year that you requested. The calendar on the right shows the workdays and non-workdays that you define.

Field	Explanation
Branch	<p>A code that represents a high-level business unit. It can be used to reference a branch or plant that might have departments or jobs, which represent lower-level business units (data item MCU), subordinate to it. For example:</p> <ul style="list-style-type: none"> ▪ Branch/Plant (MMCU) ▪ Dept A (MCU) ▪ Dept B (MCU) ▪ Job 123 (MCU) <p>Business unit security is based on the higher-level business unit.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>This value identifies the branch or plant in which the calendar resides. It must be a valid business unit.</p>
Calendar Year	The calendar year.
Calendar Month	The calendar month.
Shift	<p>A user defined code (07/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard.</p> <p>For payroll and time entry:</p> <p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p> <p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For repetitive manufacturing, this field identifies the shift for the production line.</p> <p>The Line Scheduling Workbench and Line Sequencing Workbench programs use these shift and line specific calendars to schedule production accordingly.</p>

Field	Explanation
Calendar Name	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For repetitive manufacturing, this field provides the link to the Work Center Master, which allows the system to create calendars for that production line. You must also identify all shifts for the production line.</p> <p>The Line Scheduling Workbench and Line Sequencing Workbench programs use these shift and line specific calendars to schedule production accordingly.</p>

Setting Up Manufacturing Constants

	<p>From Shop Floor Management (G31), enter 29 From Shop Floor Control Setup(G3141), choose Manufacturing Constants</p>
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You set up manufacturing constants to maintain general branch or plant information that affects processing throughout the Manufacturing system, such as:

- When inventory is committed and backflushed
- Which overhead costs calculations are used
- Whether work center efficiency is considered when calculating direct labor and overhead
- Whether an audit trail tracks all changes made to bills of material
- Whether the system validates bills of material online as you enter them

Information that you define for manufacturing constants affects all areas of the JD Edwards World Manufacturing system, so you should make your choices carefully.

Complete the following tasks:

- Set up engineering manufacturing constants
- Set up production manufacturing constants (optional)
- Set up accounting manufacturing constants

To set up engineering manufacturing constants

On Manufacturing Constants

1. Complete the following fields:
 - On-Line BOM Validation
2. Complete the following optional fields:
 - Log Bill of Material Changes
 - Master Routings
 - Percent Bill Validation

Field	Explanation
Log Bill of Material Changes	<p>This field determines whether changes to the bill of material are recorded in the Bill of Material Change table (F3011). Valid values are:</p> <p>Y Yes, log changes.</p> <p>N No, do not log changes.</p> <p>Blank will assume an N.</p> <p>When you log bill of material changes, the system saves the old bill of material and the new changed bill of material.</p>

Field	Explanation
On-Line BOM Validation (Y/N)	<p>Determines whether the system performs an online component/parent validation and low-level code assignment when you revise a bill of material.</p> <p>Valid values are:</p> <p>Y Yes, validate items online.</p> <p>N No, do not validate items online.</p> <p>Note: JD Edwards World recommends that you validate items online (enter Y) unless your bills of material are extremely large.</p> <p>Important: If you enter N, you must validate the items in batch. Run the Print Integrity Analysis program (P30601) after bill of material updates and before you run the Cost Simulation (P30820) and Cost Update program (P30835) or perform a DRP/MPS/MRP generation (P3482).</p>
Master Routings (Y/N)	<p>This field controls whether the system uses the master routing for an item or a routing defined for the parent item. Both routings are retrieved from the Routing Master table (F3003). Valid values are:</p> <p>Y Yes, use the master routing for an item, if one exists. The Shop Floor Control system will check the Item Cross Reference table (F4104), Cross Reference Type MR, for the parent item. If it finds a cross-reference, the system uses the master routing from the Routing Master table (F3003). If it does not find a cross-reference, the system uses the routing defined for the parent item.</p> <p>N No, do not check for a master routing for the item. The system will always use the parent item's routing from the Routing Master table (F3003).</p>
Percent Bill Validation	<p>This flag designates whether percent bills are allowed to contain fixed or variable components in addition to the 100% formula. If left blank, only percent components will be allowed and it must total 100%.</p>

See Also

- *Setting Up Manufacturing Constants (P3009) in Product Data Management Discrete Manufacturing Guide*

To set up production manufacturing constants

On Manufacturing Constants

Complete the following optional fields:

- Backflush Option
- Commitment Control

- Hard/Soft Commit
- Hours
- Shift Code

Field	Explanation
Backflush Options	<p>Determines how the system performs commitment and release of inventory during the backflush process. Valid codes are:</p> <ol style="list-style-type: none"> 1 Create a standard parts list based on the value in the Commitment Control field in the Manufacturing Constants table (F3009). 2 Create a parts list, committing to the location indicated in the Work Center Master table (F30006). The Operation Sequence field in the Bill of Material table (F3002) determines the work center that is used. <p>Note: You must create the work order routing before the parts list. If you are running work order generation, the work order routing and the parts list must be created at the same time.</p>
Commitment Control	<p>Determines how the system commits inventory to a work order, and limits the inventory location to which commitments are made. The system activates this field only when you create hard commitments. Valid codes are:</p> <ol style="list-style-type: none"> 1 Make commitments to the primary location in the branch/plant where the work order originates. 2 Split the parts list and commitments to fill any component shortages. The system can cross branch boundaries to fill requirements. In this case, the system uses the next alphabetical branch/plant listed in the table that occurs after the branch/plant on the work order header. For example: <ul style="list-style-type: none"> CAL CHI CLE HOU <p>If the system starts committing inventory at branch/plant CHI, it accesses CLE as the next branch/plant. If inventory is low in all locations, the system makes the remaining commitments to the primary location of the branch/plant on the work order header.</p> 3 Same as 2, but the system cannot cross branch boundaries. <p>When you set the Commitment Method field in the Item Branch/Plant table to 2 or 3 (lot number or expiration date control), you must set this field to 3.</p>

Field	Explanation
Hard/Soft Commit	<p>Determines how the Shop Floor Control system commits inventory. Valid codes are:</p> <ol style="list-style-type: none"> 1. The system performs a hard commitment at the creation of the parts list. The hard commitment remains in effect until inventory is relieved. 2. The system performs a soft commitment at the creation of the parts list. This is changed to a hard commitment during the pick list print process for the work order. The hard commitment remains in effect until inventory is relieved. 3. The system performs a soft commitment at creation of the parts list. The soft commitment remains in effect until inventory is relieved. <p>When the hard/soft commit option is set to 2 or 3, any line item in the parts list may be hard committed prior to printing or relieving the inventory.</p> <p>Note: When you set the Commitment Method field in the Branch/Plant Constants form to 2 or 3, you must use 1 or 2 for this field because a hard commitment must be performed.</p> <p>Note: A soft commitment will not be generated for a secondary location. So if there is a location that is filled in on the parts list the part has to be hard committed. This is a hard rule that overrides other rules. If the system is set to soft commit until inventory is relieved, the system will not use the commitment control field because only a soft commitment to the primary location will be created and used until the inventory is issued.</p>
Work Hours Per Day	<p>The number of work hours that the manufacturing plant operates per day.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For repetitive manufacturing, identify the number of work hours per shift for the specified branch. The Resource Generation program uses the corresponding shift hours to calculate the available resource units for each shift, and the total for the day.</p> <p>Since the shift hours may apply to different days of the week, the system uses the total of the first three hours to define the work hours per day value.</p>

Field	Explanation
Shift Code	<p>A user defined code (07/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard.</p> <p>For payroll and time entry:</p> <p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p> <p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For repetitive manufacturing, use the six corresponding shift fields to identify all production line shifts for the specified branch. The Resource Generation program uses the corresponding shift hours to calculate the available resource units for each shift, and the total for the day.</p>

To set up accounting manufacturing constants

On Manufacturing Constants

1. Complete the following fields:
 - Modify Cost by Work Center Efficiency
 - Include Efficiency in Overhead
 - Include Variable Labor Overhead in Cost
 - Calculate Variable on Direct Labor
 - Calculate Variable on Setup Labor
 - Include Fixed Labor Overhead in Cost
 - Calculate Fixed on Direct Labor
 - Calculate Fixed on Setup Labor
 - Include Variable Machine Overhead in Cost
 - Include Fixed Machine Overhead in Cost
2. Complete the following optional field:
 - Overheads as Percents or Rates

Field	Explanation
Overheads as Percents or Rates	<p>Determines how values for overhead fields (cost components C1 through C4) in the Work Center Rate Revisions table (F30008) are expressed. Valid codes are:</p> <p>R Express overhead values as rates (currency values). For example, enter five dollars as 5.00.</p> <p>P Express overhead values as percents. Enter percents as whole numbers. For example, enter five percent as 5.00.</p>
Modify cost by Work Center Eff	<p>Controls whether the cost rollup creates cost component B4 (for labor efficiency) based on the direct labor value (cost component B1) and the Work Center Efficiency percent from the Work Center Revisions table (F30006). Valid values are:</p> <p>Y Yes. Create cost component B4.</p> <p>N No. Do not create cost component B4.</p>
Include Efficiency in Overhead	<p>If you specified that you want to modify costs by work center efficiency, this field determines whether the cost rollup includes work center efficiency when calculating overhead values. Valid values are:</p> <p>Y Include work center efficiency.</p> <p>N Exclude work center efficiency.</p>
Include Var. Labor Overhead in cost	<p>Controls whether the cost rollup creates cost component C3 (for variable labor overhead) in the Cost Components table (F30026). Valid values are:</p> <p>Y Yes. Create cost component C3.</p> <p>N No. Do not create cost component C3.</p>
Calculate Var. on Direct Labor	<p>Determines whether the cost rollup includes direct labor expenses (cost component B1) in the total used to calculate variable labor overhead (cost component C3). Valid values are:</p> <p>Y Include direct labor expenses.</p> <p>N Exclude direct labor expenses.</p>
Calculate Var. on Setup Labor	<p>Determines whether the cost rollup includes setup labor expenses (cost component B2) in the total used to calculate variable setup overhead (cost component C3). Valid values are:</p> <p>Y Include setup labor expenses.</p> <p>N Exclude setup labor expenses.</p>
Include Fixed Labor Overhead in cost	<p>Controls whether the cost rollup creates cost component C4 (for fixed labor overhead) in the Cost Components table (F30026). Valid values are:</p> <p>Y Yes. Create cost component C4.</p> <p>N No. Do not create cost component C4.</p>

Field	Explanation
Calculate Fixed on Direct Labor	Determines whether the cost rollup includes direct labor expenses (cost component B1) in the total used to calculate fixed labor overhead (cost component C4). Valid values are: Y Include direct labor expenses. N Exclude direct labor expenses.
Calculate Fixed on Setup Labor	Determines whether the cost rollup includes setup labor expenses (cost component B2) in the total used to calculate fixed setup overhead (cost component C4). Valid values are: Y Include setup labor expenses. N Exclude setup labor expenses.
Include Var. Machine Overhead in cost	Controls whether the cost rollup creates cost component C1 (for variable machine overhead) in the Cost Components table (F30026). Valid values are: Y Yes. Create cost component C1. N No. Do not create cost component C1.
Include Fixed Machine Overhead in cost	Controls whether the cost rollup creates cost component C2 (for fixed machine overhead) in the Cost Components table (F30026). Valid values are: Y Yes. Create cost component C2. N No. Do not create cost component C2.

Setting Up Work Centers



From Shop Floor Management (G31), enter **29**
From Shop Floor Control Setup (G3141), choose **Enter/Change Work Centers**

You can maintain general information about a work center, such as pay points, prime load codes, number of machines and workers, crew size, and backflush locations.

Before You Begin

- Set up your work centers and dispatch groups as valid business units on the Single Business Unit Revisions form.

What You Should Know About

System calculations

If you set the Modify Cost by Work Center Efficiency field to Y on Manufacturing Constants, the system multiplies the Efficiency field value by the direct labor cost to create a B4 cost type (labor efficiency) in the Item Cost Component Add-Ons table.

Warehouse Management interface	If you use Warehouse Management and do not set up valid work center locations, the system interfaces with Warehouse Management when you attach a parts list to a work order. If you do set up valid work center locations before you attach a parts list, but the quantity exceeds the quantity you have in the work center, the system uses Warehouse Management to create a pick request for the remaining quantity to fill the work order request.
Maintaining rates for your work center	<p>From Enter/Change Work Center, you can access Work Center Rate Revisions to maintain both simulated and frozen values for machine and labor hours. You can update the simulated rates, but not the frozen values. The system updates frozen values when you run the Frozen Cost Update program.</p> <p>Other JD Edwards World manufacturing programs use these values, including Costed Routings, Labor Rate Variance reports, Direct Labor Efficiency reports, and Cost Rollup reports.</p>
Maintaining business units and tracking costs	From Enter/Change Work Center, you can access Business Unit Information to maintain business units and track costs.
Crew size and backscheduling	The crew size is used to calculate the actual labor hours on the attached routing. For example, if in the Routing (P3003) the hours for labor is 2 and the crew size is 10, then when the routing is attached to a work order, the labor hours on the attached routing will be 20 hours. This calculation will only influence backscheduling for variable lead-time items as backscheduling for fixed lead-time items uses the "Average time per operation" formula.

To set up work centers

On Enter/Change Work Center

1. To locate the record for your work center, complete the following field:
 - Work Center
2. Complete the following optional fields:
 - Dispatch Group
 - Work Center Type (for repetitive manufacturing)
 - Calendar (for repetitive manufacturing)
 - Crew Size
 - Queue Hours
 - Move Hours
 - Replenishment Hours
 - Location - Issue
 - Location Branch
 - Capacity Standard (for repetitive manufacturing)
 - Capacity Unit of Measure (for repetitive manufacturing)
 - Capacity Minimum (for repetitive manufacturing)
 - Capacity Maximum (for repetitive manufacturing)
 - Hours (for repetitive manufacturing)

Field	Explanation
Work Center	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses this value for Journal Entries if you do not enter a value in the AAI table.</p>
Dispatch Group	<p>A super category code to group work centers within an overall business unit. For example, you can group like machines operating out of several work centers that report to one business unit under a dispatch group.</p>
Crew Size	<p>The number of people who work in the specified work center or routing operation.</p> <p>The system multiplies the Run Labor value in the Routing Master table (F3003) by crew size during costing to generate total labor dollars.</p> <p>If the Prime Load Code is L or B, the system uses the total labor hours for back scheduling. If the Prime Load Code is C or M, the system uses the total machine hours for back scheduling without modification by crew size.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For Shop Floor Control:</p> <p>If you leave the Hours field on the Routing Revisions form blank, the system uses the value entered in this field for leadtime and scheduling calculations.</p>
Move Hours	<p>The planned time in hours that is required to move the order from this operation to the next operation in the same work center.</p> <p>If the Routing Master values are blank, the default value comes from the work order routing. However, the system uses these values only for back scheduling variable leadtime items.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>If you leave the Hours field on the Routing Revisions form blank, the system uses the value entered in this field for leadtime and scheduling calculations.</p>

Field	Explanation
Replenishment Hours	<p>The time required before a consuming work center will have a replacement container of goods available from this supplying work center.</p> <p>This value is used only for KANBAN card processing in Shop Floor Control.</p>
Work Center Type	<p>Defines the type of work center. Possible values are :</p> <p>Blank Stand alone work center</p> <p>1 Production line in a repetitive environment</p> <p>2 Reporting work station within a production line</p> <p><i>Form-specific information</i></p> <p>For repetitive manufacturing, the system verifies the value is not valid as a work center for an operation from the routing.</p>
Calendar	<p>Enter the value of the calendar which corresponds to the calendar type. For example, if the calendar type is ROUTE, enter a valid route code to display the calendar for a particular route.</p>
Capacity Max	<p>The upper limit capacity beyond which a production line can not produce.</p>
Capacity Min	<p>The lower limit capacity beyond which the production line should not operate. This value is decided by management based on efficiencies, costs, etc.</p>
Capacity UOM	<p>Production unit of measure used to express the capacity of a production line. For example Stamps, injections, etc.</p>
Capacity Std	<p>The standard capacity level at which a production line usually operates.</p>
Hours	<p>The number of work hours that the manufacturing plant operates per day.</p> <p><i>Form-specific information</i></p> <p>For repetitive manufacturing, identify the number of work hours per shift for the specified work center. Use the six corresponding shift fields to identify all production line shifts for the specified work center.</p>
Shift Code / Description	<p>The number of work hours that the manufacturing plant operates per day.</p> <p><i>Form-specific information</i></p> <p>For repetitive manufacturing, identify the number of work hours per shift for the specified work center. Use the six corresponding shift fields to identify all production line shifts for the specified work center.</p>

Setting Up Resource Units



From Shop Floor Management (G31), enter 29
From Shop Floor Control Setup (G3141), choose Enter/Change Resource Units

Resource unit information indicates the capacity of a work center on a given day. The system uses this information to backschedule work orders in shop floor control and to calculate available hours for capacity planning.

Before You Begin

- Define workdays for the branch or plant in the shop floor calendar

What You Should Know About

Generating resource units

You can manually change the values to account for scheduled or unscheduled downtime, additional shifts, or vacation time. However, each time you run Refresh Resource Units, the system recalculates the form values based on information in the Work Center Revisions, Shop Floor Calendar, and Manufacturing Constants tables and overwrites your manual changes.

You cannot manually change the values if the shift value is an * to show total hours on Enter/Change Work Center.

Refreshing information

Refresh Resource Units is a DREAM Writer program that recalculates the work center hours and updates them on the Enter/Change Resource Units form. The system recalculates the resource units for a work center based on information in the Enter/Change Work Center form, Shop Floor Calendar form, and Job Shop Manufacturing Constants table. You can create versions to recalculate the labor, setup, or machine hours and set the processing options to update different dates and branches. Any manual changes that you make to the hours on the Enter/Change Resource Units form is overwritten when you run the refresh process.

The system multiplies the number of machines or employees from the Enter/Change Work Centers form by the work hours per day from the Job Shop Manufacturing Constants table for each work day defined on the Shop Floor Calendar for the branch.

Resource unit calculations for machine and labor related hours are:

- Machine related hours (prime load code = C or M)
Number of machines X Work hours per day
- Labor related hours (prime load code = L or B)
Number of employees X Work hours per day

See Also

- *Product Data Management Discrete Manufacturing Guide*
- *Setting Up the Shop Floor Calendar (P00071)*

To set up resource units

The Work With Resource Units form shows the work hours available each day of a specified month for a work center.

On Enter/Change Resource Units

The screenshot shows the 'Enter/Change Resource Units' form in Oracle JD Edwards World. The form is titled '3007 Enter/Change Resource Units' and includes a 'Branch' field. The main area displays a calendar for December 2006, with columns for Sunday through Saturday. The grid shows work hours for each day, with values ranging from 3 to 31. Below the grid, there are fields for 'Weekend' utilization, 'Total Resource Units', and 'Efficiency Utilization'. The form also includes a 'Field Sensitive Help' menu on the left and a 'Tools' menu at the top.

Day	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
3	4	5	6	7	8	9	10
17	18	19	20	21	22	23	24
24	25	26	27	28	29	30	31

1. Complete the following fields:
 - Branch
 - Unit of Measure
 - Work Center
 - Calendar Month/Year
 - Resource Unit
2. Complete the following optional fields:
 - Shift (for repetitive manufacturing)
 - Efficiency
 - Utilization

Field	Explanation
Unit of Measure	<p>A user defined code (system 00/type UM) that identifies the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic yard, gallon, an hour, and so on.</p>
Work Center	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, or branch/plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>This value identifies the available capacity for the work center.</p>
Shift Code	<p>A user defined code (07/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard.</p> <p>For payroll and time entry:</p> <p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p> <p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>You can view the total resources available for a given day by entering an asterisk (*) in this field.</p> <p>For repetitive manufacturing, enter a 1-6 to allow the system to display a specific shift's units, or enter a * to view the total resource availability for the specified time period. While this program displays the total units for the shift/day for work centers defined with a standard capacity and unit of measure in those units, the system stores the data in hours.</p>

Field	Explanation
Efficiency	<p>A user defined value that indicates how efficiently a work center operates. This value usually refers to people efficiency. When you enter a value in this field, and the Modify Cost by Work Center Efficiency field in the Job Shop Manufacturing Constants table (F3009) is set to Y, the system creates a new cost component (B4) from the cost calculated from the direct labor cost (B1). The system also uses this value to calculate rated capacity.</p> <p>Example: If the constant is set to Y, the value of this field is 80%, and the direct labor cost is 10, the system creates a B4 cost component for 2 in the Item Cost Component Add-Ons table (F30026).</p> <p>Enter percents as whole numbers, for example, enter 80% as 80.00.</p>
Total Resource Units	The total resource units for the month.
Utilization	<p>A percentage that indicates how intensively a work center is being used. This value usually refers to machine use. It is the ratio of the direct time charged for production activities to the planned hours. This value is also used to calculate rated capacity.</p> <p>Enter percents as whole numbers, for example, enter 80% as 80.00.</p>

Processing Options

See [Refresh Resource Units \(P3007G\)](#).

Setting Up Line and Item Relationships

	<p>From Shop Floor Management (G31), enter 29 From Shop Floor Control Setup (G3141), choose Line/Item Relationships</p>
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The Line/Item Relationships program allows you to add, change, and delete data stored in the Line/Item Relationships table. These relationships include lines where an item is produced and the amount of resources consumed by an item on each line. Planning uses the record you flag as the default when the system creates rates. The specification for shift and period is only valid for the default line.

To set up line and item relationships

On Line/Item Relationships

Complete the following fields:

- Branch/Plant
- Item Number
- Line/Cell
- Capacity Units
- Default
- Shift
- Period

Field	Explanation
Line/Cell Identifier	Defines a production line or cell. Detailed work center operations can be defined inside the line or cell. For rate based manufacturing to use this value for reporting, this value must match the line cell in the header.
Resource units consumed	Indicates how many of the line's resource units are needed to produce one item.

Field	Explanation
Shift Code	<p>A user defined code (07/SH) that identifies daily work shifts. In payroll systems, you can use a shift code to add a percent or amount to the hourly rate on a timecard.</p> <p>For payroll and time entry:</p> <p>If an employee always works a shift for which a shift rate differential is applicable, enter that shift code on the employee's master record. When you enter the shift on the employee's master record, you do not need to enter the code on the timecard when you enter time.</p> <p>If an employee occasionally works a different shift, you enter the shift code on each applicable timecard to override the default.</p>
Month/Week/Day/Shift	<p>A code that determines the frequency of the schedule. Valid codes are:</p> <ul style="list-style-type: none">1 Monthly2 Weekly3 Daily4 Per Shift

5 Processing Options

Discrete Manufacturing Processing Options

Manufacturing Work Order Entry (P48013)

Processing Option	Processing Options Requiring Further Description
<p>BACKSCHEDULING INFORMATION:</p> <p>1. Enter the Unit of Measure Code.</p>	<p>HR for hours is the normal unit of measure for this field. If this option is left blank backscheduling will not be calculated correctly.</p>
<p>RECALCULATION OPTIONS:</p> <p>2. Enter a '1' to automatically recalculate Parts List and Routing dates, hours and quantities.</p>	<p>This updates the Work Order Variance file (F3102).</p>
<p>ITEM BRANCH/PLANT VALIDATION:</p> <p>3. Enter a '1' to validate for existing Branch/Item record.</p>	
<p>LOT NUMBER CONTROL:</p> <p>4. Enter a '1' to protect the lot number on the parts list.</p>	
<p>CHARGE TO BUSINESS UNIT DEFAULT:</p> <p>5. Enter a '1' to default the Charge to Business Unit from the Job number in the Business Unit Master file (F0006). If left blank, the Branch/Plant will be used.</p>	
<p>BILL AVAILABILITY:</p> <p>6. Enter the version of Bill Availability to be called. If left blank, 'ZJDE0001' will be used.</p>	
<p>DEFAULT VALUES:</p>	

Processing Option	Processing Options Requiring Further Description
7. Document Type (Default is 'WO') 8. Type (Optional) 9. Priority (Optional) 10. Beginning Status (Optional)	
CATEGORY CODES: 11. Enter defaults for the following: Category Code 1 (Optional) Category Code 2 (Optional) Category Code 3 (Optional) Or, enter the Item Branch Class Code fields from which to retrieve values: Category Code 1 (Optional) Category Code 2 (Optional) Category Code 3 (Optional)	
SALES ORDER HOLD CODE: 12. Enter the Hold Code for the related sales order if the work order quantity or date changes. If left blank, the sales order will not be updated.	
PURCHASE ORDER HOLD CODE: 13. Enter the Hold Code to be updated to the related purchase order if the work order quantity or date changes. If left blank, the purchase order will not be updated. Note: The purchase order will be updated only if the work order routings are to be recalculated.	
FIELD DISPLAY: 14. Enter a '1' by the following fields to activate them: Bill Type Routing Type	
PROCESS MANUFACTURING PROCESSING:	

Processing Option	Processing Options Requiring Further Description
<p>15. Enter a '1' to create the Resource List records for Co-/By-Products when a process work order is entered.</p> <p>If left blank, Resource List records will be created when ingredients list is attached to the work order.</p>	
<p>INTERACTIVE BILL/ROUTING ATTACHMENT:</p> <p>16. Enter a '1' to automatically create the WO Routing Instructions when creating the WO Parts List on-line.</p> <p>17. Enter a '1' to automatically create the WO Parts List when creating the WO Routing Instructions on-line.</p>	
<p>SUBSTITUTE PROCESSING:</p> <p>18. Enter the substitute processing method to be used when creating the Work Order Parts List on-line.</p> <p>1 = Use substitutes for shortages. (Commitment processing must be used if '1' is selected.)</p> <p>2 = Display the substitute availability window when substitute quantity available can cover shortage.</p> <p>If left blank, substitute processing will not be done.</p>	
<p>COMMITMENT PROCESSING:</p> <p>19. Enter a '1' to bypass commitment processing when creating the Parts List on-line.</p> <p>If left blank, commitments will be processed per Commitment Control in Manufacturing Constants (P3009).</p>	
<p>ECO PROCESSING:</p> <p>20. Enter the version of the ECO header to call from Revisions Window.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>SERIAL NUMBER PROCESSING:</p> <p>21. Enter the version of Assign Serial Numbers to call.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	

Processing Option	Processing Options Requiring Further Description
<p>PRIOR REVISIONS:</p> <p>22. Enter a '1' to permit attaching parts lists at prior revision levels.</p>	
<p>WAREHOUSE PROCESSING:</p> <p>23. Enter the request processing mode.</p> <p>1 = Generate requests only</p> <p>2 = Generate requests and process using the subsystem</p> <p>If left blank, no pick requests will be generated.</p> <p>24. If processing pick requests using the subsystem, enter the version of Process Pick Requests (P46171) to call.</p> <p>If left blank, 'XJDE0002' will be used.</p> <p>25. Enter the default staging location for moving goods out of the warehouse.</p> <p>26. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated.</p> <p>Note: This option only applies to parts with no work center locations.</p>	
<p>GENERIC TEXT COPY OPTIONS:</p> <p>27. Enter a '1' to copy the component's generic text to the parts list.</p> <p>28. Enter a '1' to copy the operation's generic text to the work order routing.</p>	
<p>OBSOLETE ITEMS:</p> <p>29. Enter the cross reference code for retrieving item replacements for obsolete items.</p>	
<p>USER-DEFINED PROGRAM:</p> <p>30. Enter the program name to be called when the function key is selected from the Parts/Ingredients List program (P3111).</p>	
<p>PHANTOM OPERATION SEQUENCE NUMBER:</p>	

Processing Option	Processing Options Requiring Further Description
<p>31. Enter a '1' to default the phantom's (parent) operation sequence for the components on the parts list.</p> <p>If left blank, the component's operation sequence will be used.</p>	
<p>FROZEN COST FOR ITEM:</p> <p>32. Enter a '1' to get a hard error if no frozen cost exists for the item.</p> <p>If left blank (default), a warning will be issued instead.</p>	
<p>WORK ORDER START DATE UPDATE:</p> <p>33. Enter a '1' to update the Work order Start Date with the Start Date of the first routing operation for variable Lead time.</p> <p>If left blank, no updating will be performed.</p>	
<p>CHARGE TO CC (COST CENTER) FIELD:</p> <p>34. If the Parent WO Number field is input as part of a Component Work Order, populate the Charge to CC field (MCU) by entering a:</p> <p>' ' to retrieve from the Parent's Work Order Charge to CC field (MCU). Blank is the default.</p> <p>'1' to retrieve from the Component Work Order Branch/Plant field (MMCUC).</p>	
<p>LOT EXPIRATION DATE:</p> <p>35. Select the date that will be used to determine the eligibility of lot /serial numbered components.</p> <p>Only lots with effective dates less than or equal to the date specified AND expiration dates (based on the item's commitment date method) greater than or equal to the date specified will be considered.</p> <p>' ' = Parts list required date (default)</p> <p>'1' = Work order start date</p> <p>'2' = Work order requested (completion) date</p>	
<p>AUTOMATIC LOT NUMBER GENERATION:</p>	

Processing Option	Processing Options Requiring Further Description
36. Enter a '1' to automatically generate a lot number upon work order creation for items with a Lot Process Type of 1 or 2.	
PURCHASE ORDER INFORMATION: 37. Enter the version of Write Purchase Orders program (P3420). If left blank, 'ZJDE0002' will be used. QUALITY MANAGEMENT: 38. Enter the version of Test Results Revisions program (P3711). If left blank, 'ZJDE0002' will be used.	

Generate and Print Work Orders (P31410)

Processing Option	Processing Options Requiring Further Description
GENERATION INFORMATION: 1A. Enter one of the following: 1 = Parts List only 2 = Routing only 3 = Both Parts List and Routing If left blank, neither parts list nor routing will be generated. 1B. Enter a '1' to prevent the update of existing parts list and routing instructions. Commitment and substitute processing of parts lists will occur as usual. If left blank, existing parts list and/or routing will be rewritten. 2. Enter a '1' to use the W.O. Date for effectivity checking. If left blank, the W.O. Start Date is used.	<p>Note: If using Backflush to Work Center location in Manufacturing Constants, then routings must be attached first for commitments to be made correctly.</p> <p>Note: If transactions have occurred against the order the parts list and routing should be protected from update.</p>
UPDATE INFORMATION: 3. Enter the new Status Code for the work order/rate header. If left blank, status will not be changed.	
WORK ORDER PRINT INFORMATION:	

Processing Option	Processing Options Requiring Further Description
<p>4. Enter a '1' to print work orders. If printing work orders:</p>	
<p>PARTS LIST PRINT INFORMATION:</p> <p>5. Enter a '1' to print Parts List</p> <p>6. Enter a '1' to print the 2nd line of information, which is scrap and related work center.</p> <p>7. Enter a '1' to print Parts List on a new page.</p> <p>8. Enter the version of the Parts List program (P31415). If left blank, 'ZJDE0001' will be used.</p> <p>9. Enter a '1' to print a consolidated Parts List.</p>	
<p>ROUTING PRINT INFORMATION:</p> <p>10. Enter a '1' to print the Routing.</p> <p>11. Enter a '1' to print Routing on a new page.</p> <p>12. Enter the version of the Routing Instructions program (P314151). If left blank, the operation sequence is used.</p>	
<p>BACKSCHEDULING INFORMATION:</p> <p>13. Enter the Unit of Measure for backscheduling.</p>	<p>Note: Hours is the standard unit of measure for backscheduling. If this option is left blank, backscheduling will not calculate correctly.</p>
<p>SHOP PACKET SUMMARY INFORMATION:</p> <p>14a. Enter a '1' to print the Shop Packet Summary.</p> <p>14b. Enter the version of the Shop Packet Summary program (P31416). If left blank, 'ZJDE0001' will be used.</p>	
<p>SHORTAGE REPORT INFORMATION:</p> <p>15. Enter the version of the Shortage Report program (P31418). If left blank, no shortage report will be printed.</p>	
<p>BAR CODE INFORMATION:</p>	

Processing Option	Processing Options Requiring Further Description
<p>16. Enter the version of the Bar Code Print program (P31413) for the desired print overrides.</p>	
<p>INVENTORY ISSUE INFORMATION:</p> <p>17. Enter the version of Batch Inventory Issues program (P31420).</p> <p>If left blank, Inventory Issues will not be called.</p>	
<p>PURCHASE ORDER INFORMATION:</p> <p>18. Enter the version of Write Purchase Orders program (P3420).</p> <p>If left blank, 'ZJDE0002' will be used.</p>	
<p>SALES ORDER INFORMATION:</p> <p>19. Enter the new Line Type for kit and configured components. This is used to avoid issuing inventory from Sales Order processing. The Line Type used should be inventory interface 'N'.</p> <p>If left blank, Line Type will not be changed.</p> <p>20. Enter the Next Status for Sales Order kit and configured component lines. (This is used to bypass the normal flow of the order, i.e., Pick Slip.)</p> <p>If left blank, next status will not be changed.</p> <p>21. Enter a '1' to delete the existing Work Order Text and copy the Sales Order Text to the Work Order.</p> <p>Enter a '2' to append the Sales Order Text to the end of the existing Work Order Text.</p> <p>If left blank (default) the Work Order Text will not be updated.</p>	
<p>CONFIGURED ITEM COSTS:</p>	

Processing Option	Processing Options Requiring Further Description
<p>22. Enter one of the following options for calculating the standard cost for configured items in the Work Order Variance file (F3102).</p> <p>1 = Always calculate the standard cost</p> <p>2 = Only calculate the standard cost if it has not already done (no variance records exist)</p> <p>If left blank, standard cost will not be calculated.</p>	
<p>BOM SUBSTITUTES:</p> <p>23. Enter '1' to allow the use of Bill of Material substitutes in case of a shortage.</p>	
<p>PURCHASING JOURNAL ENTRIES:</p> <p>24. Enter a '1' to load the Work Order Number into the Subledger field of the purchasing J/E's.</p>	
<p>BLANKET/QUOTE PROCESSING:</p> <p>25. Enter a '1' for automatic blanket order release processing.</p>	
<p>BUILD AGAINST PRIOR REVISIONS:</p> <p>26. Enter a '1' to permit building work orders against prior revision levels. The revision level in the work order header (F4801) will be used to select the parts list to attach to the work order.</p> <p>If left blank, prior revision level bills will not be selected.</p>	
<p>WAREHOUSE PROCESSING:</p> <p>27. Enter the request processing mode:</p> <p>1 = Generate requests only</p> <p>2 = Generate requests and process using the subsystem.</p> <p>If left blank, requests will not be generated.</p> <p>28. If processing pick requests using the subsystem, enter the version of Process Pick Requests (P46171) to call.</p> <p>If left blank, 'XJDE0002' will be used.</p> <p>29. Enter the default staging location for moving goods out of the warehouse.</p>	

Processing Option	Processing Options Requiring Further Description
<p>30. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated.</p> <p>Note: This option only applies to parts with no work center locations.</p>	
<p>GENERIC TEXT PRINT OPTIONS:</p> <p>31. Enter a '1' to print the component's generic text on the Parts List.</p> <p>32. Enter a '1' to print the operation's generic text on the Routing.</p>	
<p>BAR CODE INFORMATION:</p> <p>34. Enter the format for bar code printing.</p> <p>1 = Code 3 of 9 (Code 39)</p> <p>2 = Code 128</p> <p>If left blank, bar codes will not print.</p>	
<p>COMMITMENT PROCESSING:</p> <p>35. Enter a '1' to bypass commitment processing when creating the Parts List.</p> <p>If left blank, commitments will be processed per Commitment Control in Manufacturing Constants (P3009).</p>	
<p>QUALITY MANAGEMENT:</p> <p>36. Enter '1' to print Manufacturing Specifications.</p> <p>37. Enter the version of the Manufacturing Specifications print program to call (P37470).</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>PHANTOM OPERATION SEQUENCE NUMBER:</p> <p>38. Enter a '1' to default the phantom's (parent) operation sequence for the components on the parts list.</p> <p>If left blank, the component's operation sequence will be used.</p>	
<p>WORK ORDER START DATE UPDATE:</p>	

Processing Option	Processing Options Requiring Further Description
39. Enter a '1' to update the Work order Start Date with the Start Date of the first routing operation for variable lead time. If left blank no updating will be performed	
<p>LOT EXPIRATION DATE:</p> <p>40. Select the date that will be used to determine the eligibility of lot/ /serial numbered components. Only lots with effective dates less than or equal to the date specified AND expiration dates (based on the item's commitment date method) greater than or equal to the date specified will be considered.</p> <p>' ' = Parts list required date (default) '1' = Work order start date '2' = Work order requested (completion) date</p>	
<p>AUTOMATIC LOT NUMBER GENERATION:</p> <p>41. Enter a '1' to automatically generate a lot number upon co/by products creation for items with a lot process type of 1 or 2.</p>	

General User-Defined Codes (P0005A)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT CODE/TYPE:</p> <p>1. Enter the desired Install System Code.</p> <p>2. Enter the desired Record Type.</p>	

Work Order Repost (P3190)

Processing Option	Processing Options Requiring Further Description
PROCESSING CONTROL:	

Processing Option	Processing Options Requiring Further Description
<p>1. Enter the Status for update. Any work order or rate with a status less than this value will be reposted.</p> <p>If left blank, status '99' will be used.</p>	<p>Enter the Status for update. Any work order or rate with a status less than this value will be reposted. This means that commitments will be cleared and rewritten for any work order less than this status. If left blank, status '99' will be used.</p>

Lot Master Revisions (P4108)

Processing Option	Processing Options Requiring Further Description
<p>PROCESS CONTROL:</p> <p>1. Enter a '1' to update the lot status for all lot locations when updating the lot status or a '2' to display all lot locations and indicate for which locations the lot status needs to be updated.</p> <p>If left blank, only the lot master lot status will be updated.</p> <p>2. Enter a '1' to protect the lot status from being updated.</p> <p>3. Enter a '1' to protect the lot grade from being updated.</p> <p>4. Enter a '1' to protect the lot potency from being updated.</p>	
<p>DEFAULT PROCESSING:</p> <p>5. Enter the document type to be used when updating the lot grade.</p> <p>If left blank, the default document type 'CG' will be used.</p>	
<p>6. Enter the document type to be used when updating the lot potency.</p> <p>If left blank, the default document type 'CP' will be used.</p>	
<p>PERCENTAGE OF LIFE REMAINING:</p> <p>7. Enter a '1' to calculate/display the Percentage of Life Remaining.</p> <p>If left blank, it will not be displayed.</p> <p>8. Enter a '1' to calculate/display Days Until Expiration.</p> <p>If left blank, it will not be displayed.</p>	

Processing Option	Processing Options Requiring Further Description
<p>QUALITY MANAGEMENT:</p> <p>9. Enter the version of Test Results Revisions (P3711) to call.</p> <p>If blank, 'ZJDE0001' will be used.</p>	

Lot Availability (P41280)

Processing Option	Processing Options Requiring Further Description
<p>DREAM WRITER VERSIONS:</p> <p>1. Enter the Version of the Trace/Track Inquiry to call.</p> <p>2. Enter the Version of Item Master Revisions (P4101) to call.</p> <p>3. Enter the Version of Work Order Entry (P48013) to call.</p> <p>4. Enter the Version of Branch/Plant Item Information (P41026) to call.</p> <p>5. Enter the Version of Lot Master Revisions (P4108) to call.</p> <p>6. Enter the Version of the Test Results Revision (P3711) to call.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>FIELD DISPLAY:</p> <p>7. Enter a '1' to protect Lot Status from being updated.</p>	
<p>GRADE AND POTENCY:</p> <p>8. Enter a '1' to display the grade range.</p> <p>If left blank, no range will be displayed for selection.</p> <p>9. Enter a '1' to display the potency range.</p> <p>If left blank, no potency will be displayed for selection.</p>	

Lot Tracing and Tracking (P41203)

Processing Option	Processing Options Requiring Further Description
<p>Enter a '1' to track lot usage.</p> <p>Default is to trace lot usage.</p> <p>Enter '1' to use 15 character lot, leave blank to default to 12 character</p>	

Item Reclassifications (P4116)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES :</p> <ol style="list-style-type: none"> Document type for item change. Enter a '1' to default the Location and Lot from the primary Location <p>Note: When using blank secondary locations, this processing option is invalid.</p>	
<p>PROCESS CONTROL :</p> <ol style="list-style-type: none"> Method for assigning expiration date to newly created lots. (If left blank, method 1 will be used.) 1 = Assign manually. 2 = Newest From Expiration Date. 3 = Oldest From Expiration Date. 4 = Transaction date + shelf life. 	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version of each program to be used.</p> <p>If left blank, ZJDE0001 will be used.</p> <ol style="list-style-type: none"> Journal Entries (P09101) G/L Functional Server (XT0911Z1) Item Search (P41200) Item Ledger (P4111) Warehouse Requests (P46100) 	
<p>PROCESSING CONTROL :</p>	

Processing Option	Processing Options Requiring Further Description
<p>9. Enter a '1' to protect costs or a '2' to make costs non-display. If left blank, the update of costs is allowed.</p> <p>10. Enter a '1' to protect Lot Number, Lot Expiration Date, and Lot Status. If left blank, the fields will remain input capable.</p>	
<p>11. Enter a '1' to run in summary mode. G/L accounts will be summarized within each document number. If run in detail, G/L accounts will be produced for each line.</p> <p>12. Enter a '1' to allow transfers from held lots.</p> <p>13. Enter a '1' to allow transfers greater than quantity available.</p> <p>Note: This option will allow your inventory balance to go negative.</p>	
<p>14. Method of quantity validation for from and to quantities within a transaction. ' ' - No validation performed. '1' - Warning if out of balance. '2' - Error if out of balance.</p>	
<p>15. Enter which item search screen is to be used to return items. 1 = Item Search Window allowing the return of multiple items. 2 = Full item search screen with query capability. (If left blank the item search screen allowing the return of multiple items will be used.)</p> <p>16. Enter '1' to use 15 character lot, leave blank to default to 12 characters.</p>	

Part/Ingredient Availability (P30205)

Processing Option	Processing Options Requiring Further Description
<p>SAFETY STOCK:</p> <p>1. Enter a '1' if safety stock is to be subtracted from the Quantity on Hand.</p>	
<p>DEFAULT VALUES:</p> <p>2. Enter the Bill Type. If left blank, 'M' will be used.</p> <p>3. Enter a '1' to prevent displaying phantom items when exploding the bill of material.</p> <p>4. Enter the display mode: 1 - Single Level (All Items) 2 - Multi Level (All Items) 3 - Single Level (Negative Items) 4 - Multi Level (Negative Items)</p> <p>5. Enter a '1' to prevent displaying the components for a Subassembly with a Stocking Type of 'P'. If left blank, the components will display on the video.</p>	

Parts List Inquiry (P3121)

Processing Option	Processing Options Requiring Further Description
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <p>1. Purchase Order Inquiry (P430301)</p> <p>2. Supply/Demand Inquiry (P4021)</p>	

Item Shortage Workbench (P3128)

Processing Option	Processing Options Requiring Further Description
<p>DREAM WRITER VERSIONS: Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <ol style="list-style-type: none"> WO Inventory Issues (P31113) Shortage Revisions (P3118) 	
<p>DEFAULT VALUES:</p> <ol style="list-style-type: none"> Document Type (Default is 'WO') 	

Shortage Revisions (P3118)

Processing Option	Processing Options Requiring Further Description
<p>DREAM WRITER VERSIONS: Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <ol style="list-style-type: none"> Open Work Orders (P31225) Open Purchase Orders (P430301) Shortage Workbench (P3128) 	
<p>DEFAULT VALUES:</p> <ol style="list-style-type: none"> Document Type (Default is 'WO') 	

Work Order Component Shortage List (P31418)

Processing Option	Processing Options Requiring Further Description
<p>REPORT FORMAT:</p> <ol style="list-style-type: none"> Enter a '1' to print only parts with shortages. If left blank, all items will be printed. 	

Work Order Inventory Issues (P31113)

Processing Option	Processing Options Requiring Further Description
<p>UPDATE INFORMATION:</p> <ol style="list-style-type: none"> 1. Enter the Document Type associated with an inventory issue. 2. Enter the Status Code for update to the work order header. If left blank, the header will not be updated. 3. Enter the default value for the Material Status Code. If left blank, material status will not be updated. 4. Enter the Status Code beyond which issues cannot be made. 	
<p>INQUIRY INFORMATION:</p> <ol style="list-style-type: none"> 5. Enter a '1' to display only valid Issue Type Codes. If left blank, all Parts List items will display. 6. Enter a '1' to preload all screen detail lines with the selection value to process the issue. 	
<p>OPERATION SEQUENCE FIELD:</p> <ol style="list-style-type: none"> 7. Enter a '1' to display operations that equal the entered Operation Sequence. If left blank, the value will be used as a 'Skip To' field. 	
<p>REQUESTED DATE FIELD:</p> <ol style="list-style-type: none"> 8. Enter a '1' to display operations that equal the entered Requested Date. If left blank, the value will be used as a 'Skip To' field. 	
<p>EDIT INFORMATION:</p> <ol style="list-style-type: none"> 9. Enter a '1' to give an error if the quantity on hand is negative. 	<p>NOTE: If another program calls a blind execution of this program, P31113, this message will not display and material will not issue.</p>
<p>ITEM SALES HISTORY INFORMATION:</p> <ol style="list-style-type: none"> 10. Enter a '1' to update Item Sales History (F4115) file. 	

Processing Option	Processing Options Requiring Further Description
<p>HOLD CODE TO ISSUE:</p> <p>11. Enter the lot hold codes (up to 5) that are acceptable for inventory issues, or enter a '*' to allow issues to all held lots.</p> <p>If left blank, issues to held lots will not be allowed.</p>	
<p>SHORTAGE MAINTENANCE:</p> <p>12. Enter the version of Shortage Maintenance (P3118) to be called.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>UNPLANNED ISSUES:</p> <p>13. Enter '1' to allow for unplanned issues.</p> <p>14. Enter a '1' to default the Location and Lot from the Primary Location.</p> <p>If left blank, the user must specify a valid Location and Lot.</p>	
<p>LOT NUMBER:</p> <p>15. Enter '1' to protect the lot number from entry.</p>	
<p>PROCUREMENT INFORMATION:</p> <p>16. Enter the document type for purchase orders. (Default is 'OP')</p> <p>17. Enter the version of the Open Inquiry Window program (P3160W) to use.</p> <p>If left blank, 'ZJDE0001' will be used.</p> <p>18. Enter the default route type to be used to search for a receipt route. (Default is 'OT')</p>	
<p>RECEIPT ROUTINGS:</p> <p>19. Enter the value of the default route to be used for items without a receipt routing.</p> <p>20. Enter the version of Receipt by PO/Item/Account (P4312) to call.</p> <p>If left blank, 'ZJDE0008' will be used.</p>	
<p>MOVE AND DISPOSITION:</p> <p>21. Enter the version of Move and Disposition (P43250) to call.</p> <p>If left blank, 'ZJDE0002' will be used.</p>	

Processing Option	Processing Options Requiring Further Description
<p>FOR STANDARD COSTING:</p> <p>22. Enter a '1' to use the cost from F4105 for manufacturing accounting.</p> <p>If left blank, use cost from F30026 for manufacturing accounting.</p>	

Component Scrap Transactions (P31116)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT FORMAT:</p> <p>1. Enter a '1' for Item Number entry.</p> <p>If left blank, Work Order Number entry will be used.</p>	
<p>DEFAULT VALUES:</p> <p>2. Enter the Item Ledger Transaction date.</p> <p>If left blank, the system date will be used.</p> <p>3. Reason Code (Optional)</p> <p>4. Enter the Document Type associated with the Component Scrap Transaction.</p>	
<p>SERIAL NUMBER PROCESSING:</p> <p>5. Enter the Document Type to use for Serial Number Issues.</p> <p>If left blank, 'IM' will be used.</p>	

Manufacturing Scheduling Workbench (P31225)

Processing Option	Processing Options Requiring Further Description
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program.</p> <p>If left blank, 'ZJDE0001' will be used.</p> <p>1. Sales Order Inquiry (P42045)</p> <p>2. Purchase Order Inquiry (P430301)</p>	

Processing Option	Processing Options Requiring Further Description
<ul style="list-style-type: none"> 3. a Work Order Completions (P31114) 3. b Super Backflush (P31123) 4. Work Order Entry (P48013) 5. Sales Order Entry (P4211) 6. Purchase Order Entry (P43111) 7. Work Order Issues (P31113) 	
<p>DISPLAY OPTIONS:</p> <ul style="list-style-type: none"> 8. Enter a '1' to display Requested Date or enter a '2' to display Start Date. (Default is '1') 9. Enter a '1' to sequence the records by Requested date. Enter a '2' to sequence the records by Start date. If left blank, the sequence will be based on values for the Customer, Parent Work Order Number, Cross-Reference, Item or Planner fields. 	
<p>DEFAULT VALUES:</p> <ul style="list-style-type: none"> 10. Category Code 1 (Optional) 11. Category Code 2 (Optional) 12. Category Code 3 (Optional) 13. Type (Optional) 14. Priority (Optional) 15. Planner Number (Optional) 16. From Status (Optional) 17. Thru Status (Optional) 18. Item Number (Optional) 19. Customer Number (Optional) 20. Reference (Optional) 21. Document Type (Optional) 	
<p>PROCESS MANUFACTURING PROCESSING:</p>	

Processing Option	Processing Options Requiring Further Description
<p>22. Enter a '1' to automatically create the WO Routing Instructions when creating the WO Parts List on-line.</p> <p>23. Enter a '1' to automatically create the WO Parts List when creating the WO Routing Instructions on-line.</p>	
<p>SUBSTITUTE PROCESSING:</p> <p>24. Enter the substitute processing method to be used when creating the Parts List on-line.</p> <p>1 = Use substitutes for shortages. (Commitment processing must be used if '1' is selected.)</p> <p>2 = Display the substitute availability window when substitute quantity available can cover shortage.</p> <p>If left blank, substitute processing will not be done.</p>	
<p>COMMITMENT PROCESSING:</p> <p>25. Enter a '1' to bypass commitment processing when creating the Parts List on-line.</p> <p>If left blank, commitments will be processed per Commitment Control in Manufacturing Constants (P3009).</p>	
<p>WORK ORDER PARTS LIST INFORMATION:</p> <p>26. Enter the version of the Work order Parts List Quantities Inquiry(P3121).</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>QUALITY MANAGEMENT:</p> <p>27. Enter the version of Test Results Revisions (P3711) to call.</p> <p>If left blank, 'ZJDE0002' will be used.</p>	

Work Order Time Entry (P311221)

Processing Option	Processing Options Requiring Further Description
<p>DISPLAY INFORMATION:</p>	

Processing Option	Processing Options Requiring Further Description
<p>1. Enter a '1' for the screen to be displayed in Order Number format.</p> <p>If left blank, the screen will be displayed in Employee format.</p>	
<p>UPDATE INFORMATION:</p> <p>2. Enter the document type associated with shop floor activity.</p>	
<p>EDIT INFORMATION:</p> <p>3. Enter the status code beyond which shop floor activity cannot be entered.</p> <p>4. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the Quantity At Operation.</p> <p>5. Enter a '1' to prevent the employee rate from being written to the screen.</p>	
<p>QUALITY MANAGEMENT:</p> <p>6. Enter the version of Test Results Revisions (P3711) to call.</p> <p>If left blank, 'ZJDE0002' will be used.</p>	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program.</p> <p>If left blank, 'ZJDE0001' will be used.</p> <p>7. Scheduling Workbench (P31225)</p> <p>8. Production Status (P31226)</p>	

Manufacturing/Payroll Time Entry (P061181)

Processing Option	Processing Options Requiring Further Description
<p>1. Enter 'E' to use the Employee Occupational Pay Rate Table or</p> <p>Enter 'U' to use the Union Rate Table.</p> <p>If neither 'E' nor 'U' is entered, blank is the default and the Employee Master hourly rate will be used.</p>	

Processing Option	Processing Options Requiring Further Description
<p>2. If the Union Table is selected, Enter the Pay Type to be used for each of the following categories.</p> <p>If the Occupational Table is selected, only enter the Pay Type for "Regular".</p> <p>Regular - Blank</p> <p>Overtime - A</p> <p>Double time - B</p> <p>Triple time - C</p> <p>Holiday - D</p> <p>3. Enter '1' to have batch numbers automatically assigned.</p> <p>(F13=Invalid)</p> <p>4. Enter '1' to have heading date and batch to be loaded from the first subfile record.</p> <p>5. Enter '1' to display batch statistics on request.</p> <p>6. Enter '1' to prevent changes and deletes to records locked to another user.</p> <p>7. Enter '1' to edit Pay Type from Classification/Pay X-Ref.</p> <p>8. Enter '1' to use Zero Billing Rate.</p> <p>9. Enter '1' to load Pay Type Desc. into Explanation field (YTEXR).</p> <p>---MANUFACTURING INFORMATION---</p> <p>10. Enter the Document Type associated with Shop Floor Activity.</p> <p>11. Enter the Status Code beyond which Shop Floor Activity cannot be entered.</p> <p>12. Enter the Version of Shop Floor Hours and Quantity Entry to call.</p> <p>(Default is version ZJDE0001)</p> <p>13. Enter a '1' to use the Employee Pay Instructions Table - F06106.</p> <p>If left blank, the Employee Master hourly rate will be used.</p> <p>14. Enter a '1' for HH:MM:SS format.</p> <p>If left blank, decimal format will be used (HH.MM).</p>	

Production Status (P31226)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES: 1. From Status (Optional) 2. Through Status (Optional) 3. The number of days to add to today's date for the Thru date (Optional)	

Work Order Completion - Full (P31114)

Processing Option	Processing Options Requiring Further Description
INVENTORY INTERFACE: 1. Enter the Document Type associated with an Inventory Completion. 2. Enter the Document Type associated with an Inventory Scrap.	
WORK ORDER ISSUES: 3. Enter a '1' to call the Work Order Issues program. 4. Enter the DREAM Writer version of Work Order Issues to be called. If left blank, 'ZJDE0001' will be used.	
WORK ORDER HEADER: 5. Enter the Status Code for update to the work order header. (optional)	
EDIT INFORMATION: 6. Enter the Status Code beyond which completions may not be made.	
LOT HOLD CODES: 7. Enter the Lot Hold Codes (up to 5) to allow completions to, or enter a '*' to allow completions to all held lots. If left blank, completions will not be allowed to held lots.	

Processing Option	Processing Options Requiring Further Description
<p>SALES ORDER OPTIONS:</p> <p>8. Select one of the following:</p> <p>1 = Sales Order Number will default to the Work Order Completion Lot</p> <p>2 = Sales Order Number will default to the Work Order Completion Location, and the Sales Order Line Number will default to the Work Order Completion Lot</p> <p>3 = Work Order Number will Default to the Work Order Completion Lot</p> <p>9. Enter a '1' to update the Sales Detail fields (Lot Number & Location) as defined in Option 8.</p> <p>If left blank, Sales Detail will not be updated.</p> <p>NOTE: Processing Option 9 must be used in conjunction with Option 8. If Option 8 is blank, then Option 9 must also be blank.</p> <p>10. Enter an override Sales Order Next Status or leave blank to use the Sales Order Next Status from the Order Activity Rules.</p> <p>11. Enter a '1' to update the Sales Next Status Code on the related sales order.</p> <p>12. Enter a '1' to display the Back- Order Release screen for completed backordered items.</p> <p>If left blank, backordered sales orders will not be displayed.</p> <p>13. Enter the DREAM Writer version of Backorder Release (P42117) to be called.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>SHORTAGE WORKBENCH:</p> <p>14. Enter the DREAM Writer version of Shortage Workbench to be called.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>RECEIPT ROUTING:</p> <p>15. Enter a '1' to initiate the receipt routing process.</p> <p>If left blank, all items will be completed directly into stock.</p>	

Processing Option	Processing Options Requiring Further Description
<p>LOT/SERIAL NUMBER OPTIONS:</p> <p>16. Enter the Lot/SN control:</p> <p>1 = Allow overriding the Lot/SN during completions</p> <p>2 = Protect the Lot/SN from entry If left blank, once the Lot/SN is specified the value can not be overridden.</p>	
<p>WORK ORDER ENTRY:</p> <p>17. Enter the DREAM Writer version of Work Order Entry to be called.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>PROCESS MANUFACTURING OPTIONS:</p> <p>18. Enter a '1' to allow unplanned Co/By-product completions.</p> <p>19. Enter a '1' to issue ingredients for each Co/By-product separately.</p> <p>If left blank, ingredient issues will be consolidated for the process.</p>	
<p>WAREHOUSE PROCESSING:</p> <p>20. Enter the directed putaway mode:</p> <p>1 = Request putaway only</p> <p>2 = Request putaway and process using the subsystem</p> <p>If left blank, no putaway requests will be generated.</p> <p>21. If processing putaway requests through the subsystem, enter the version of Putaway Requests (P46171) to call.</p> <p>If left blank, 'ZJDE0001' will be used.</p>	
<p>SERIAL NUMBER PROCESSING:</p> <p>22. Enter a '1' to allow a completion to a serial number that exists in the system with a zero quantity.</p> <p>23. Enter a '1' to default to multiple associations format window.</p> <p>If left blank, single format will default.</p> <p>24. Enter the Document Type used for Serial Number Issues.</p> <p>If left blank, 'IM' will be used.</p>	

Processing Option	Processing Options Requiring Further Description
<p>QUALITY MANAGEMENT:</p> <p>25. Enter the version of Test Results Revisions (P3711) to call. If left blank, 'ZJDE0002' will be used.</p>	
<p>BRANCH/PLANT CONTROL:</p> <p>26. Enter a '1' to display the completion Branch/Plant field.</p>	
<p>LOT EXPIRATION DATE:</p> <p>27. Enter a '1' to display Lot Expiration Date. The default is blank to not display the lot expiration date.</p>	
<p>ITEM COST:</p> <p>28. Enter a '1' to not allow the completion for the item without cost. If left blank, completion will be performed.</p>	
<p>OVER COMPLETION:</p> <p>29. Enter a '1' to not allow over completion beyond the tolerance defined in PO # 30 (below). If left blank, only a warning message will be received upon over completion.</p> <p>30. Enter the over completion tolerance. Example: enter 10 if you want to be able to over complete up to 10%. Over completion tolerance is used in conjunction with a value of '1' in PO # 29. If left blank, only a warning message will be received upon over completion.</p>	

Release Backorders (P42117)

Processing Option	Processing Options Requiring Further Description
<p>STATUS CODES:</p> <p>1. Next Status to Select (Optional)</p> <p>2. Override Next Status (Optional)</p>	

Processing Option	Processing Options Requiring Further Description
<p>DISPLAY OPTIONS:</p> <ol style="list-style-type: none"> 3. If inquiring by Item Number, enter a '1' to only display those Backorders that can be completely filled. 4. If inquiring by Item Number, enter a '1' to sequence by Priority Code. If left blank, sequence will be by Promised Ship Date. 5. Enter a '1' to display kit component lines. If left blank, each kit component will be treated as a separate line. 6. Enter a '1' to add back in the Quantity on Backorder in Quantity Available calculations. If left blank, the Quantity on Backorder will not be added in. 7. Enter a '1' to display Customer Information. If left blank, Item Information will display. 8. Enter a '1' to display orders on hold. If left blank, orders on hold will not display. 	<p>When an order backorders, the quantity is logged as both a soft commitment and a backordered quantity in the Item Balance file (F41021). If you have set up your system to subtract soft committed quantities from on-hand quantities to determine availability, you'll want to set this option to 1; otherwise, the system may not release backorders for which there is enough quantity available to release.</p> <p>For example, if the on hand quantity for an item is 10 and the backordered/soft committed quantity is 10, then availability equals zero. You'll want the program to add the backordered quantity of 10 to availability so the system recognizes there's enough quantity available to release the order.</p> <p>You can view quantity and commitment balances for an item in Detailed Availability (P41023).</p>
<p>RELEASING OPTIONS:</p> <ol style="list-style-type: none"> 9. Enter a '1' to only soft commit Released Backorders. If left blank, Released Backorders will be hard committed. 10. Enter a '1' to allow Backorders to be released when Quantity to Ship is greater than Quantity on Backorder. 	<p>If you leave this option blank, the P42117 calls the P42997 to hard commit released order quantities.</p>

Processing Option	Processing Options Requiring Further Description
<p>11. Enter a '1' to allow Backorders to be released when Quantity on Hand is zero. If left blank, Backorders will not release when Quantity on Hand is zero.</p> <p>12. Enter a '1' to update Released Backorders with the most current cost of the item. If left blank the original cost of the item on the Sales Order will be used.</p>	
<p>CREDIT PROCESSING:</p> <p>13. Enter a code for credit checking. If left blank, no credit checking will be done.</p>	
<p>ORDER HOLD PROCESSING:</p> <p>14. Enter the partial order hold code that will be released when an order is completely filled.</p>	
<p>AUTOMATIC PROCESSING:</p> <p>15. Enter a '1' to print pickslips or a '2' to print invoices through the subsystem.</p>	
<p>VERSION OPTIONS:</p> <p>Enter the version for each program. If left blank, ZJDE0001 will be used.</p> <p>16. Sales Order Entry (P4211)</p> <p>17. Customer Service Inquiry (P42045)</p> <p>18. Item Availability (P41202)</p>	
<p>WAREHOUSE PROCESSING:</p> <p>19. Enter the request processing mode: ' ' - No pick requests '1' - Generate requests only '2' - Generate requests and process using the subsystem</p> <p>20. If processing pick requests using the subsystem, enter the DREAM Writer version to use. If blank, XJDE0002 is used. (See Form ID P46171.)</p>	

Processing Option	Processing Options Requiring Further Description
21. Enter an override next status for sales order lines for which requests have been generated.	
<p>LOT PROCESSING:</p> <p>22. Enter '1' to include immature lots (those not yet in effect) in the calculation of availability.</p> <p>If left blank, an immature lot will not be counted as available.</p>	

Super Backflush (P31123)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <p>1. Operation Status for partial completions (Optional)</p> <p>2. Operation Status for full completions (Optional)</p> <p>3. Status Code for update to the Work Order Header (Optional)</p>	
<p>WORK ORDER ISSUES INFORMATION:</p> <p>4. Enter the Version of the Material Issues Program to call.</p> <p>If left blank, 'ZJDE0001' will be used.</p> <p>5. Enter a '1' to call the Material Issues Program in a blind mode.</p>	
<p>SHOP FLOOR ACTIVITY INFORMATION:</p> <p>6. Enter the Version of the Hours and Quantity Program to call.</p> <p>If left blank, 'ZJDE0001' will be used.</p> <p>7. Enter a '1' to call the Hours and Quantity Program in a blind mode.</p> <p>8. Enter a '1' to automatically update hours & quantities data.</p> <p>Note: This eliminates the need for a separate interactive or batch update but the data will not be available for review on the Hours and Quantities screen.</p>	

Processing Option	Processing Options Requiring Further Description
<p>WORK ORDER COMPLETION INFORMATION:</p> <p>9. Enter the Version of the Work Order Completions Program to call. If left blank, 'ZJDE0001' will be used.</p> <p>10. Enter a '1' to call the Work Order Completion Program in a blind mode.</p>	
<p>QUANTITY COMPLETION CONTROL:</p> <p>11. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the 'Quantity At Operation.' If left blank, the verification is not performed.</p>	
<p>QUALITY MANAGEMENT:</p> <p>12. Enter the version of Test Results Revisions (P3711) to call. If left blank, 'ZJDE0002' will be used.</p>	

Work Order Purge (P4801P)

Processing Option	Processing Options Requiring Further Description
<p>PROCESSING CONTROL:</p> <p>1. Enter a '1' to save purged records to a special purge library.</p> <p>2. Enter a '1' to reorganize the purged file.</p>	

Kanban Consumption/Supply (P3157)

Processing Option	Processing Options Requiring Further Description
<p>DISPLAY:</p> <p>1. Enter a '1' to display the Kanban Supply video format. If left blank, the Kanban Consumption video format will be displayed.</p>	

Processing Option	Processing Options Requiring Further Description
<p>2. When using the Kanban Supply format (previous option = '1'), enter a '1' to display only checked-out kanbans. If left blank, all kanbans will be shown.</p>	
<p>RATE SCHEDULE INFORMATION:</p> <p>3. Enter the version of Enter/Change Rate Schedule program (P3109) to call for creation and processing of rate schedules. If left blank, 'ZJDE0001' will be used.</p> <p>4. Beginning Status</p> <p>5. Closed Status</p> <p>WORK ORDER INFORMATION:</p> <p>6. Enter the version of Work Order Generation program (X4201WO) to call. If left blank, 'ZJDE0001' will be used. NOTE: The cancel status from the version specified here will be used for rates as well.</p> <p>7. Enter a '1' to attach Parts List and Routing.</p> <p>8. Enter the version for Work Order Processing program (P31410) to call. If left blank, 'ZJDE0001' will be used.</p>	
<p>PURCHASE ORDER INFORMATION:</p> <p>9. Enter a '1' to trigger an EDI 862 transaction.</p> <p>10. Enter the version of Open Orders Inquiry Window program (P3160W) to be called. If left blank, 'ZJDE0001' will be used.</p> <p>11. Enter the versions of P43500 to call for EDI 862 transaction: a. Generation (blank = XJDE0008) b. Cancellation (blank = XJDE0009)</p> <p>12. Enter the default Routing Type to be used to search for a receipt routing.</p> <p>13. Enter the value of the default Routing Type to be used for items without a receipt routing setup.</p>	

Processing Option	Processing Options Requiring Further Description
<p>14. Enter the versions of Purchase Order Receipts (P4312) to call.</p> <p>a. Source Type 3 (Supplier) Blank = ZJDE0008</p> <p>b. Source Type 5 (Branch/Plant) Blank = ZJDE0007</p> <p>15. Enter a '1' to create a Purchase Order.</p> <p>16. Enter the version of Write Purchase Orders program (P3420) to call. If left blank, 'ZJDE0001' will be used.</p>	
<p>B/P TRANSFER ORDER INFORMATION:</p> <p>17. Enter the version of the Transfer Order Entry program (P4242) to call. If left blank, 'ZJDE0001' will be used.</p> <p>MATERIAL ISSUES INFORMATION:</p> <p>18. Enter the version of the Material Issues program (P31113) to call. If left blank, 'ZJDE0001' will be used.</p> <p>19. Enter a '1' to call the Material Issues Program in a blind mode.</p>	
<p>SHOP FLOOR ACTIVITY INFORMATION:</p> <p>20. Enter the version of the Hours and Quantities program (P311221) to call. If left blank, 'ZJDE0001' will be used.</p> <p>21. Enter a '1' to call the Hours and Quantities Program in a blind mode.</p> <p>22. Enter the Document Type associated with Shop Floor Activity in blind mode. If left blank, 'IH' will be used.</p>	
<p>23. Enter a '1' to automatically update hours & quantities data.</p> <p>NOTE: This eliminates the need for a separate interactive or batch update but the data will not be available for review on the Hours and Quantities screen.</p>	
<p>COMPLETIONS INFORMATION:</p> <p>24. Enter the version of the Completions program (P31114) to call. If left blank, 'ZJDE0001' will be used.</p>	

Processing Option	Processing Options Requiring Further Description
25. Enter a '1' to call the Completions Program in blind mode.	
INVENTORY TRANSFER:	
26. Enter the version of the Inventory Transfer program (P4113) to call. If left blank, 'ZJDE0001' will be used.	
27. Enter a '1' to call Inventory Transfer Program in blind mode.	
AUTOMATIC INQUIRY VALUES:	
28. Item Number (Optional)	
29. Location (Optional)	
TRANSACTION CONFIRMATION:	
30. Enter a '1' to prompt the confirmation of a transaction.	
BLANKET/QUOTE PROCESSING:	
31. Enter a '1' for automatic blanket order release processing.	
CALCULATION:	
32. Enter the number of hours equivalent to one day (Default is 8). Replenish Lead Time (from kanban master) divided by the value of this processing option determines lead time. If replenishment hours are not established, 1 day is used as the lead time.	

Kanban Status Override (P3163)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to prevent updates to Status '1' - Checked-In. If left blank (default), updates to this status are allowed.	
2. Enter a '1' to prevent updates to Status '2' - Checked-out. If left blank (default), updates to this status are allowed.	

Processing Option	Processing Options Requiring Further Description
<p>3. Enter a '1' to prevent updates to Status '3' - Completed.</p> <p>If left blank (default), updates to this status are allowed.</p>	

Co-/By-Products Produced by Process (P30201)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <p>1. Enter one of the following:</p> <ul style="list-style-type: none"> 1 = Single-Level 2 = Multi-Level 3 = Indented 4 = All processes where a co- or by-product is produced 5 = Part/Ingredient Availability If left blank, the Single-Level mode will be displayed. <p>2. Bill Type (Optional)</p>	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <p>NOTE: Option 6 is only valid if System 13 (Equipment) is available.</p> <p>3. Item Search (P41200)</p> <p>4. Material Where-Used Print (P30420)</p> <p>5. Work Order Entry (P48013)</p> <p>6. Item Availability (P30205)</p> <p>7. Where-Used Detail (P13226)</p>	

Item Availability (P41202)

Processing Option	Processing Options Requiring Further Description
PROCESS CONTROL:	

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to omit locations with no quantity available. If left blank, all locations will display.	
DREAM WRITER VERSIONS: Enter the version for each program. If left blank, ZJDE0001 will be used. 2. Item Master (P4101) 3. Text Message Code Review (P40010) 4. Item Search (P41200) 5. Purchase Order Inquiry (P430301) 6. Customer Service Inquiry (P42045) 7. Open Work Orders (P31225) 8. Supply and Demand (P4021) 9. Bill of Materials (P30200) 10. Lot Availability (P41280)	
Enter the version for each program. If left blank, ZJDE0001 will be used. 11. Item Ledger (P4111) 12. Branch/Plant Item Info. (P41026) 13. Availability by Location (P4190) 14. Item / Location Information (P41024)	
GRADE AND POTENCY: 15. Enter a '1' to display the grade range. If left blank, no grade will display for selection. 16. Enter a '1' to display the potency range. If left blank, no potency will display for selection.	
PERCENTAGE OF LIFE REMAINING: 17. Enter a '1' to calculate/display the Percentage of Life Remaining. If left blank, it will not be displayed.	

Processing Option	Processing Options Requiring Further Description
18. Enter a '1' to calculate/display Days Until Expiration. If left blank, it will not be displayed.	

Supply & Demand (P4021)

Processing Option	Processing Options Requiring Further Description
<p>DISPLAY OPTIONS:</p> <ol style="list-style-type: none"> Enter a '1' to deduct Safety Stock from Availability. Enter a '1' by the following Routing Quantities to be considered on hand. Any quantity not included will be displayed on the appropriate date. Quantity in Transit Quantity in Inspection User Defined Quantity 1 User Defined Quantity 2 Enter a '1' to summarize all In Receipt Routing steps into one line. 	
<ol style="list-style-type: none"> Enter a '1' to summarize Item Location records. Enter one of the following: ' ' = No Available to Promise Line '1' = Available to Promise Line '2' = Cumulative ATP Line Enter the version of Supply/Demand Inclusion Rules to be used. Enter a '1' to display the window format if called from another program. 	
<ol style="list-style-type: none"> Enter a '1' to use an alternate screen format which has long quantity fields. 	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the DREAM Writer version to use for each program listed. If left blank, version ZJDE0001 will be used.</p> <ol style="list-style-type: none"> Purchase Order Entry (P4311) 	

Processing Option	Processing Options Requiring Further Description
10. Purchase Order Inquiry (P430301) 11. Sales Order Entry (P4211) 12. Sales Order Inquiry (P42045) 13. Scheduling Workbench (P31225) 14. MPS/MRP/DRP Pegging Inq. (P3412) 15. MPS/MRP/DRP Time Series (P3413) 16. MPS/MRP/DRP Message Detail(P3411)	
OPTIONAL RECORDS: 17. Enter a '1' to include Planned Orders from MPS/MRP/DRP generations. If left blank, Planned Orders will not be displayed. 18. Enter the Forecast Type to include Forecast Type Forecast Type Forecast Type Forecast Type Forecast Type	
19. Enter the number of days (+/-) from today's date that you wish to begin including Forecast records. A blank will use today's date to begin including Forecast records. 20. Enter a '1' to omit 'Bulk' Stocking Type records from screen. If left blank, 'Bulk' items will be included.	
21. Enter the rate based Schedule Type to use. If left blank, no rate based schedules will be displayed. 22. Enter a '1' to include Past Due Rates as a supply.	
POTENCY: 23. Enter '1' to convert Quantities to Standard Potency.	

Processing Option	Processing Options Requiring Further Description
<p>LOT EXPIRATION:</p> <p>24A. Enter '1' to reduce Quantity available due to lot expiration.</p> <p>Note: This option will not work with ATP. If you use this option, option 5 must be set to blank or 2.</p> <p>24B. Enter optional date to be used for expiration calculation when processing option 24A='1'.</p> <p>If left blank, Lot Expiration Date will be used.</p> <p>1=Sell By Date 2=Best Before Date 3=User Defined Date1 4=User Defined Date2 5=User Defined Date3 6=User Defined Date4 7=User Defined Date5 8=Commitment Date Method from Item/ Branch Master.</p>	
<p>LOT HOLD CODES:</p> <p>25. Enter the lot hold codes (up to 5) to be considered on hand, or enter an '*' to consider all held lots as on hand.</p> <p>If left blank, held lots will not be considered on hand.</p>	
<p>WORK ORDER ENTRY:</p> <p>26. Enter the Dream Writer version to use for the Manufacturing Work Order Entry program.</p> <p>If left blank, version ZJDE0001 will be used.</p>	
<p>BILL AVAILABILITY:</p> <p>27. Enter the version of Bill Availability (P30205) to be called.</p> <p>If left blank, version ZJDE0001 will be used.</p>	

Processing Option	Processing Options Requiring Further Description
<p>OVER DUE SUPPLY CONTROL:</p> <p>28. Enter a '1' to leave past due supply out of available calculations (past due orders will be displayed but will not be included in quantity available or ATP).</p>	
<p>FORECAST DISPLAY OPTIONS:</p> <p>29. Enter a '1' to override the planning fence rule and just use actual customer demand for the available calculation.</p> <p>Note: forecast will still appear on the screen per processing option above.</p> <p>When left blank, the available calculation will be based on the planning fence and rule established in the item's branch plant manufacturing data.</p>	

Item Ledger - Costs (P4111)

Processing Option	Processing Options Requiring Further Description
<p>DISPLAY OPTIONS:</p> <p>1. Enter the format to be displayed:</p> <p>1 = Running Quantity Balance format.</p> <p>2 = Running Dollar Balance format.</p> <p>3 = Cost Item Ledger format.</p> <p>4 = Location Item Ledger format.</p> <p>5 = Lot Status/Grade/Potency Item Ledger format.</p> <p>If left blank, the Cost Item Ledger format will be displayed.</p>	
<p>DEFAULT VALUES:</p> <p>2. Enter the default document type upon entering the video.</p> <p>If left blank, a '*' will default for all document types.</p>	

Processing Option	Processing Options Requiring Further Description
<p>3. Enter a '1' to display Item Ledger entries in ascending date and time order.</p> <p>If left blank, the entries will be displayed in descending date and time order.</p> <p>(This option does NOT apply to Running Balance formats.)</p> <p>4. Enter a '1' to search by Original Document Type.</p> <p>If left blank, the search will be done by G/L Document Type.</p>	
<p>DREAM WRITER VERSIONS:</p> <p>Enter a DREAM Writer Version for the following programs.</p> <p>(ZJDE0001) is the default.</p> <p>5. Load & Delivery Ledger Inq P49511</p>	

Parts List Comparison (P31117)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <p>1. Enter the Mode for display:</p> <p>A = Display all records</p> <p>D = Display differences only</p> <p>If left blank, 'A' will be used.</p>	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program.</p> <p>If left blank, 'XJDE0001' will be used.</p> <p>2. WO Comparison Report (P31417)</p>	

Repetitive Manufacturing Processing Options

Enter/Change Rate Schedule (P3109)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <ol style="list-style-type: none"> 1. Rate Type (Default is 'SC') 2. Number of days to add to today's date for the Thru Date (Optional) 3. From Status (Optional) 4. Thru Status (Optional) 5. Beginning status to use when creating a new rate (Optional) <p>NOTE: This status will not be used if parts list and routing are created in batch (option 18). In this case, the status in P31410 will be used.</p>	
<p>SCREEN FILTERS:</p> <ol style="list-style-type: none"> 6. Enter a '1' to only display open schedules. 	
<p>PROCESSING CONTROLS:</p> <ol style="list-style-type: none"> 7. Enter the status code at, or beyond which, the rate is considered closed. (Default is '99') 	
<p>CATEGORY CODES:</p>	

Processing Option	Processing Options Requiring Further Description
<p>8. Enter defaults for the following:</p> <ul style="list-style-type: none"> a. Category Code 1 (Optional) b. Category Code 2 (Optional) c. Category Code 3 (Optional) <p>Or, enter the Item Branch Class Code fields from which to retrieve values:</p> <ul style="list-style-type: none"> d. Category Code 1 (Optional) e. Category Code 2 (Optional) f. Category Code 3 (Optional) 	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <ul style="list-style-type: none"> 9. Completions Workbench (P3119) 10. MPS/MRP/DRP Time Series (P3413) 11. Bill Availability (P30205) 12. Assign Serial Numbers (P3105) 13. Lot Master Revisions (P4108) 14. Bill of Materials Revisions (P3002) 15. Bill of Material Inquiry (P30200) 16. Line Scheduling Workbench (P3153) 17. Supply/Demand Inquiry (P4021) 	
<p>PARTS LIST/ROUTING CREATION:</p> <ul style="list-style-type: none"> 18. Enter the method to attach a Parts List and Routing: <ul style="list-style-type: none"> 1 = Interactively 2 = Submit to Batch <p>NOTE: If left blank, Parts List and Routing will not be attached.</p> <ul style="list-style-type: none"> 19. Enter the version for P31410. If left blank, 'ZJDE0001' will be used. 	
<p>BACK SCHEDULING INFORMATION:</p> <ul style="list-style-type: none"> 20. Enter the Unit of Measure to use for scheduling. 	
<p>BILL/ROUTING RECALCULATION:</p>	

Processing Option	Processing Options Requiring Further Description
<p>21. Enter the version for P31410 if this program should update the Parts List and Routing when the Rate quantities or dates are changed.</p> <p>If left blank, no recalculation will be performed.</p>	
<p>SUBSTITUTE PROCESSING:</p> <p>22. Enter the substitute processing method to be used when creating the Rate Parts List on-line.</p> <p>1 = Use substitutes for shortages.</p> <p>(Commitment processing must be used if '1' is selected.)</p> <p>2 = Display the substitute availability window when substitute quantity available can cover shortage.</p> <p>If left blank, substitute processing will not be done.</p>	
<p>COMMITMENT PROCESSING:</p> <p>23. Enter a '1' to bypass commitment processing when creating the Parts List on-line.</p> <p>If left blank, commitments will be processed per Commitment Control in Manufacturing Constants (P3009).</p>	
<p>PRIOR REVISIONS:</p> <p>24. Enter a '1' to allow attaching parts lists at prior revision levels.</p> <p>If left blank, prior revision levels will not be used.</p>	
<p>ITEM LOCATION VALIDATION:</p> <p>25. Enter a '1' to validate for existing Branch/Item record.</p>	
<p>PURCHASE ORDER HOLD CODE:</p> <p>26. Enter the Hold Code to be updated to the related purchase order if the rate quantity or date changes.</p> <p>If left blank, the purchase order will not be updated.</p> <p>NOTE: The purchase order will be updated only if the rate routings are to be recalculated.</p>	

Processing Option	Processing Options Requiring Further Description
<p>WAREHOUSE MANAGEMENT:</p> <p>27. Enter the request processing mode. 1 = Generate requests only 2 = Generate requests and process using the subsystem. If left blank, no pick requests will be generated.</p> <p>28. If processing pick requests using the subsystem, enter the version of Process Pick Requests (P46171) to call. If left blank, 'XJDE0002' will be used.</p> <p>29. Enter the default staging location for moving goods out of the warehouse.</p> <p>30. Enter a '1' if the default staging location should be checked for availability. If the part is available at the staging location a request will NOT be generated.</p> <p>NOTE: This option only applies to parts with no work center locations.</p>	
<p>GENERIC TEXT COPY OPTIONS:</p> <p>31. Enter a '1' to copy the component's generic text to the Parts List.</p> <p>32. Enter a '1' to copy the operation's generic text to the Routing.</p>	
<p>OBSOLETE ITEMS:</p> <p>33. Enter the Cross-Reference Code for retrieving item replacements for obsolete items.</p>	
<p>CHARGE TO BUSINESS UNIT DEFAULT:</p> <p>34. Enter a '1' to default the Charge to Business Unit from the Job number in the Business Unit Master file (F0006). If left blank, the Branch/Plant will be used.</p>	

Processing Option	Processing Options Requiring Further Description
<p>LOT EXPIRATION DATE:</p> <p>35. Select the date that will be used to determine the eligibility of lot / serial numbered components. Only lots with expiration dates greater than or equal to the date specified will be considered.</p> <p>' ' = Parts list required date (default)</p> <p>'1' = Work order start date</p> <p>'2' = Work order requested (completion) date Note that this affects only when parts list is manually attached with P3111.</p>	
<p>AUTOMATIC LOT NUMBER GENERATION:</p> <p>36. Enter a '1' to automatically generate a lot number upon work order creation for items with a Lot Process Type of 1 or 2.</p>	

Line Scheduling Workbench (P3153)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <p>1. Status (FIRM rates and work orders)</p> <p>2. Document Type (Default 'SC')</p> <p>3. Shift (Optional)</p> <p>4. The number of days to add to today's date for the thru date (Optional)</p>	
<p>CLOSED RATES:</p> <p>5. Enter the status code at, or beyond which, the rate is considered closed (Default is '99')</p>	
<p>PLANNED ORDERS:</p> <p>6. Enter a '1' to display PLANNED rates and work orders.</p>	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p>	

Processing Option	Processing Options Requiring Further Description
7. Production Status (P31226) 8. Line Sequencing Workbench (P3156) 9. Split Lines Window (P3156W) 10. Part Availability (P30205) 11. Enter/Change Rate Schedule (P3109) 12. Supply/Demand Inquiry (P4021) 13. Message File Revisions (P3411) 14. Line Schedule Review (P3152) 15. Sales Order Entry (P4211)	
CAPACITY DISPLAY: 16. Enter a '1' to display capacity in units. If left blank, capacity will be displayed in percentages.	

Line Sequencing Workbench (P3156)

Processing Option	Processing Options Requiring Further Description
SCHEDULING CONTROL: 1. Enter a '1' to allow scheduling across shifts. 2. Enter a '1' to allow scheduling across days. If left blank and scheduling across shifts is allowed, remaining hours for a day will be applied to the last shift for the day. NOTE: If option 1 is left blank, option 2 is set to blank in the program.	
DATE RANGE SELECTION: 3. The number of days to add to today's date for the Thru date (Optional)	
CLOSED RATES: 4. Enter the status code at, or beyond which, the rate is considered closed (Default is '99')	

Schedule Review (P3152)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <ol style="list-style-type: none"> 1. Document Type (Default is 'SC') 2. Shift (Optional) 	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <ol style="list-style-type: none"> 3. Rate Revisions (P3109) 4. Work Order Entry (P48013) 	

Rate Transactions Workbench (P3119)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <ol style="list-style-type: none"> 1. Schedule Type (Default is 'SC') 2. Employee Number (Optional) 3. Production Line (Optional) 4. Number of days to add to the From Date for the Thru Date (Optional) 5. Status From (Optional) 6. Status Thru (Optional) 	
<p>DREAM WRITER VERSIONS:</p> <p>Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <ol style="list-style-type: none"> 7. Super Backflush (P31123) 8. Hours and Quantities (P311221) 9. Material Issues (P31113) 	

Processing Option	Processing Options Requiring Further Description
10. Enter/Change Rate Schedule (P3109) 11. Item Ledger Inquiry (P4111) 12. Line Schedule Review (P3152) 13. Schedule History Inquiry (P31226) 14. Completions (P31114) 15. Lot Master Revisions (P4108) 16. Hours & Quantities Update (P31422)	
HOURS & QUANTITIES: 17. Enter a '1' to automatically process hours & quantities using the version for P31422. If left blank, P31422 should be submitted manually.	
CLOSING RATES: 18. Enter the status code to use when closing rates. (Default is '99')	
QUALITY MANAGEMENT: 19. Enter the version of Test Results Revisions (P3711) to call. If left blank, 'ZJDE0002' will be used.	

Super Backflush (P31123)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES: 1. Operation Status for partial completions (Optional) 2. Operation Status for full completions (Optional) 3. Status Code for update to the Work Order Header (Optional)	
WORK ORDER ISSUES INFORMATION: 4. Enter the Version of the Material Issues Program to call. If left blank, 'ZJDE0001' will be used.	

Processing Option	Processing Options Requiring Further Description
5. Enter a '1' to call the Material Issues Program in a blind mode.	
SHOP FLOOR ACTIVITY INFORMATION:	
6. Enter the Version of the Hours and Quantity Program to call. If left blank, 'ZJDE0001' will be used.	
7. Enter a '1' to call the Hours and Quantity Program in a blind mode.	
8. Enter a '1' to automatically update hours & quantities data. Note: This eliminates the need for a separate interactive or batch update but the data will not be available for review on the Hours and Quantities screen.	
WORK ORDER COMPLETION INFORMATION:	
9. Enter the Version of the Work Order Completions Program to call. If left blank, 'ZJDE0001' will be used.	
10. Enter a '1' to call the Work Order Completion Program in a blind mode.	
QUANTITY COMPLETION CONTROL:	
11. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the 'Quantity At Operation.' If left blank, the verification is not performed.	
QUALITY MANAGEMENT:	
12. Enter the version of Test Results Revisions (P3711) to call. If left blank, 'ZJDE0002' will be used.	

Work Order Time Entry (P311221)

Processing Option	Processing Options Requiring Further Description
DISPLAY INFORMATION:	

Processing Option	Processing Options Requiring Further Description
<p>1. Enter a '1' for the screen to be displayed in Order Number format. If left blank, the screen will be displayed in Employee format.</p>	
<p>UPDATE INFORMATION:</p> <p>2. Enter the document type associated with shop floor activity.</p>	
<p>EDIT INFORMATION:</p> <p>3. Enter the status code beyond which shop floor activity cannot be entered.</p> <p>4. Enter a '1' to verify that, for a given operation, the total of the quantity completed plus scrapped does not exceed the Quantity At Operation.</p> <p>5. Enter a '1' to prevent the employee rate from being written to the screen.</p>	
<p>QUALITY MANAGEMENT:</p> <p>6. Enter the version of Test Results Revisions (P3711) to call. If left blank, 'ZJDE0002' will be used.</p>	
<p>DREAM WRITER VERSIONS: Enter the version for each program. If left blank, 'ZJDE0001' will be used.</p> <p>7. Scheduling Workbench (P31225)</p> <p>8. Production Status (P31226)</p>	

Production Status (P31226)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <p>1. From Status (Optional)</p> <p>2. Through Status (Optional)</p> <p>3. The number of days to add to today's date for the Thru date (Optional)</p>	

Production History (P31227)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES: 1. Operation Sequence (Optional) 2. Shift (Optional) 3. The number of days to add to today's date for the Thru Date (Optional)	

Line Dispatch List (P3159)

Processing Option	Processing Options Requiring Further Description
DEFAULT VALUES: 1. The number of days to add to today's date for the Thru Date 2. Shift (Optional) 3. From Status (Optional) 4. Thru Status (Optional)	

Kanban Consumption/Supply (P3157)

Processing Option	Processing Options Requiring Further Description
DISPLAY: 1. Enter a '1' to display the Kanban Supply video format. If left blank, the Kanban Consumption video format will be displayed.	
2. When using the Kanban Supply format (previous option = '1'), enter a '1' to display only checked-out kanbans. If left blank, all kanbans will be shown.	
RATE SCHEDULE INFORMATION:	

Processing Option	Processing Options Requiring Further Description
<p>3. Enter the version of Enter/Change Rate Schedule program (P3109) to call for creation and processing of rate schedules. If left blank, 'ZJDE0001' will be used.</p> <p>4. Beginning Status</p> <p>5. Closed Status</p> <p>WORK ORDER INFORMATION:</p> <p>6. Enter the version of Work Order Generation program (X4201WO) to call. If left blank, 'ZJDE0001' will be used. NOTE: The cancel status from the version specified here will be used for rates as well.</p> <p>7. Enter a '1' to attach Parts List and Routing.</p> <p>8. Enter the version for Work Order Processing program (P31410) to call. If left blank, 'ZJDE0001' will be used.</p>	
<p>PURCHASE ORDER INFORMATION:</p> <p>9. Enter a '1' to trigger an EDI 862 transaction.</p> <p>10. Enter the version of Open Orders Inquiry Window program (P3160W) to be called. If left blank, 'ZJDE0001' will be used.</p> <p>11. Enter the versions of P43500 to call for EDI 862 transaction: a. Generation (blank = XJDE0008) b. Cancellation (blank = XJDE0009)</p> <p>12. Enter the default Routing Type to be used to search for a receipt routing.</p> <p>13. Enter the value of the default Routing Type to be used for items without a receipt routing setup.</p> <p>14. Enter the versions of Purchase Order Receipts (P4312) to call. a. Source Type 3 (Supplier) Blank = ZJDE0008 b. Source Type 5 (Branch/Plant) Blank = ZJDE0007</p> <p>15. Enter a '1' to create a Purchase Order.</p>	

Processing Option	Processing Options Requiring Further Description
<p>16. Enter the version of Write Purchase Orders program (P3420) to call. If left blank, 'ZJDE0001' will be used.</p>	
<p>B/P TRANSFER ORDER INFORMATION:</p> <p>17. Enter the version of the Transfer Order Entry program (P4242) to call. If left blank, 'ZJDE0001' will be used.</p> <p>MATERIAL ISSUES INFORMATION:</p> <p>18. Enter the version of the Material Issues program (P31113) to call. If left blank, 'ZJDE0001' will be used.</p> <p>19. Enter a '1' to call the Material Issues Program in a blind mode.</p>	
<p>SHOP FLOOR ACTIVITY INFORMATION:</p> <p>20. Enter the version of the Hours and Quantities program (P311221) to call. If left blank, 'ZJDE0001' will be used.</p> <p>21. Enter a '1' to call the Hours and Quantities Program in a blind mode.</p> <p>22. Enter the Document Type associated with Shop Floor Activity in blind mode. If left blank, 'IH' will be used.</p>	
<p>23. Enter a '1' to automatically update hours & quantities data. NOTE: This eliminates the need for a separate interactive or batch update but the data will not be available for review on the Hours and Quantities screen.</p>	
<p>COMPLETIONS INFORMATION:</p> <p>24. Enter the version of the Completions program (P31114) to call. If left blank, 'ZJDE0001' will be used.</p> <p>25. Enter a '1' to call the Completions Program in blind mode.</p>	
<p>INVENTORY TRANSFER:</p> <p>26. Enter the version of the Inventory Transfer program (P4113) to call. If left blank, 'ZJDE0001' will be used.</p>	

Processing Option	Processing Options Requiring Further Description
27. Enter a '1' to call Inventory Transfer Program in blind mode.	
AUTOMATIC INQUIRY VALUES: 28. Item Number (Optional) 29. Location (Optional)	
TRANSACTION CONFIRMATION: 30. Enter a '1' to prompt the confirmation of a transaction.	
BLANKET/QUOTE PROCESSING: 31. Enter a '1' for automatic blanket order release processing.	
CALCULATION: 32. Enter the number of hours equivalent to one day (Default is 8). Replenish Lead Time (from kanban master) divided by the value of this processing option determines lead time. If replenishment hours are not established, 1 day is used as the lead time.	

Kanban Status Override (P3163)

Processing Option	Processing Options Requiring Further Description
1. Enter a '1' to prevent updates to Status '1' - Checked-In. If left blank (default), updates to this status are allowed.	
2. Enter a '1' to prevent updates to Status '2' - Checked-out. If left blank (default), updates to this status are allowed.	
3. Enter a '1' to prevent updates to Status '3' - Completed. If left blank (default), updates to this status are allowed.	

Batch Rate Close by Date (P3191)

Processing Option	Processing Options Requiring Further Description
<p>PROCESSING CONTROL:</p> <ol style="list-style-type: none">1. Enter the date to compare to the Rate Effective Thru Date. All rates for which the Thru Date is less than this date will be closed. If left blank, no rates will be closed.	<p>When a Rate is closed the system no longer allows Manufacturing Accounting for that rate.</p>
<p>WORK ORDER STATUS:</p> <ol style="list-style-type: none">2. Enter the status for closed rates. If left blank, '99' will be used.	

System Setup Processing Options

General User-Defined Codes (P0005A)

Processing Option	Processing Options Requiring Further Description
DEFAULT CODE/TYPE: <ol style="list-style-type: none">1. Enter the desired Install System Code.2. Enter the desired Record Type.	

Generic Rate/Message Records Program (P00191)

Processing Option	Processing Options Requiring Further Description
USER DEFINED CODES: <ol style="list-style-type: none">1. Enter the desired System Code.2. Enter the desired Record Type.	
DISPLAY INFORMATION: <ol style="list-style-type: none">3. Enter an '1' to display Rate Text or Enter an '2' to display Message Text4. If displaying Message Text, Enter an '1' for 60 column display or Enter an '2' for 80 column display	

Work Center Resource Units Refresh (P3007G)

Processing Option	Processing Options Requiring Further Description
GENERATION INFORMATION:	

Processing Option	Processing Options Requiring Further Description
<ol style="list-style-type: none"> 1. Enter the Start Date. 2. Enter the End Date. <p>Note: The program will regenerate resource units for the entire month of the start date and the entire month of the end date.</p> <ol style="list-style-type: none"> 3. Enter the Branch/Plant to be processed. 4. Enter a string of up to 6 shift codes to be processed ('123 '). If left blank, all shifts will be processed. 	

Kanban Size Calculation (P30450)

Processing Option	Processing Options Requiring Further Description
<p>PROCESSING CONTROL:</p> <ol style="list-style-type: none"> 1. Enter a '1' to calculate Kanban sizes. 2. Enter a '1' to update Kanban Master file. 3. Enter a '1' to print Kanban cards. 4. Enter a '1' to print Kanban Exception Report. 	
<p>SAFETY STOCK:</p> <ol style="list-style-type: none"> 5. Enter the desired safety stock expressed as a percentage of daily production. ('15' = 15%) 	
<p>FILTER CONTROL:</p> <ol style="list-style-type: none"> 6. Enter the range, expressed as a percentage, above or below which the Kanban should not be changed. ('15' = plus or minus 15%) 	
<p>KANBAN AVERAGE DAILY DEMAND:</p>	

Processing Option	Processing Options Requiring Further Description
<p>7. Enter a '1' to select summation of the MPS/MRP demands desired, or enter a '2' to select greater of MPS/MRP demands desired. If no demands are selected, the Planning Time Fence Rule for the item will be used.</p> <ul style="list-style-type: none"> a. Forecasts b. Sales Orders c. Firm Work Orders d. Planned Orders e. Rate Schedule 	
<p>CALCULATION:</p> <p>8. Enter number of hours equivalent to one day. (Default is 8)</p> <p>9. Enter the date range to use for the average daily demand calculation.</p> <ul style="list-style-type: none"> a. Beginning Date (Required) b. Ending Date (Required) 	
<p>USER DEFINED PROGRAM:</p> <p>10. Enter the program name of the Kanban size calculation program.</p>	
<p>BAR CODE INFORMATION:</p> <p>11. Enter the format for bar code printing.</p> <ul style="list-style-type: none"> 1 = Code 3 of 9 (Code 39) 2 = Code 128 <p>If left blank, bar codes will not print.</p>	

6 Appendices

Appendix A – Flash Messages in Shop Floor Control

About Flash Messages in Shop Floor control

There are two basic flash messages generated in Shop Floor Control:

- [W.O. Scheduling](#)
- [Operation Scheduling](#)

The messages are maintained in the UDC table (00/WM) and described by Data Dictionary item SPRT. A third message (Urgent) that is a manually appended message is shipped with the software. Other messages may be loaded to the table as required.

Both W.O. Scheduling and Operation Scheduling messages can be generated from Work Order Entry (P48013), Work Order Processing (P31410) and Work Order Routing (P3112) depending upon the validation performed in the common back scheduling routine (C3007).

W.O. Scheduling

This flash message is created when the W.O. Header Start Date and the First Operation Start Date are not equal.

Possible conditions causing this are:

- No lead time rollup has been performed and that the value for Lead-time Level for fixed L/T items, or Lead-time Per Unit for variable L/T items is blank.
- A start date has been manually entered on either the header or first operation and it does not agree with the other one.
- The back scheduling routine (C3007) has calculated a different start date than the one generated from the lead time supplied to the header.

The W.O. header program calculates a start date in one of two ways. It either retrieves the Lead-time level (IBLTLV) for fixed L/T items, or it uses Lead-time per unit (IBLTPU) factored by the time basis code and quantity ordered for variable L/T items. In each case, the external subroutine X3100 is called to return the start date.

This message can be removed by either:

- Changing the start dates to match each other.

- Manually overriding the W.O. Flash Message in either the Work Order/Rate Category Codes screen (F11 from Work Order Entry – P48013) or from the Shop Floor Workbench (P31225).

Operation Scheduling

This flash message is created when the Work Center Resource Units either do not exist or a record lock was encountered during the processing of the file (F3007).

This message can be removed by either:

- Adding the Resource Units detail required.
- Manually overriding the W.O. Flash Message in either the Work Order/Rate Category Codes screen (F11 from Work Order Entry – P48013) or from the Shop Floor Workbench (P31225).

W.O. Scheduling will override Operation Scheduling when they both occur. In this case, the correction of the error generating the W.O. Scheduling message may not necessarily resolve the issue causing the Operation Scheduling message to appear.

Urgent

This message, or other user defined flash messages, can be manually added to an order by invoking F11 on the Work Order Entry program (P48013)) or by changing the detail in the Shop Floor Workbench (P31225).

Messages entered in the above manner can be removed in the same way.

Appendix B – Lead Times

Overview

This appendix contains the following:

- [Introduction to Lead Times](#)
- [Work Order Start Dates](#)
- [Operation Start and Due Dates](#)
- [Overlapping Operations](#)
- [Overlapping and Concurrent Operations](#)
- [Calculating Lead Times](#)

Introduction to Lead Times

Determining lead time is an essential part of any manufacturing or scheduling process. For any product that you purchase or manufacture, you encounter a time lag between when you order or start it and when you receive or finish it. To account for the lag, you must estimate the extra time and allow for it in your planning.

Cumulative lead time is the total amount of time that is required to produce a product. In process manufacturing, it is the time required to complete an entire process. The Shop Floor Control system uses the requested date of the order and, based on the level lead time for the product, calculates the appropriate order start date.

Lead times include:

- Work order start dates
- Operation start and due dates
- Overlapping operations
- Overlapping and concurrent operations
- Calculating lead times

Many factors can influence your company's lead time policy, including:

- Manufacturing environment (assemble-to-order, make-to-order)
- Fixed or variable quantities
- Serial or overlap operations
- Fixed or variable time

- Number of shifts and operators
- Factoring by efficiency
- Protection

For any manufactured product, the system calculates four types of lead time:

- Level
- Manufacturing
- Cumulative
- Per unit

The Shop Floor Control system uses the following data in its calculation of lead times:

- Serial or overlap operations
- Fixed or variable lead time indicator
- Routing labor, setup, queue, move, and machine run hours
- Work center prime load code
- Number of employees or machines per work center
- Hours per work day

The system:

- Uses the information that you set up for each item on Plant Manufacturing Data in the Inventory Management system
- Coordinates the information with routing and work center information you enter in the Product Data Management (PDM) system
- Determines lead times for all parent and component items

At any point in your planning and scheduling process, you can change lead time values manually through Manufacturing Data.

You can use fixed or variable lead times for ingredients. The system subtracts fixed lead times directly from the requested date on the work request to calculate the start date of production. Fixed lead time remains the same regardless of the quantity produced. However, variable lead time adjusts according to the quantity produced.

The following explains important lead time concepts you need to understand.

Concept	Description
Machine hours	The number of machine hours required to produce the amount from the time basis code.
Labor hours	The number of labor hours required to produce the amount from the time basis code.
Setup hours	The number of hours required to prepare machinery to run a specific item, regardless of quantity.

Concept	Description
Move hours	The number of hours that a manufacturing work order is in transit from the completion of one operation to the beginning of the next.
Queue hours	The number of hours that a job waits at a work center before setup or work is performed on the job. This value is the sum of the move hours and the queue hours.
Time basis code	Indicates how machine or labor hours are expressed for a product. Time basis codes identify the time basis or rate to be used for machine or labor hours entered for every routing step, for example, 25 hours per 1,000 pieces or 15 hours per 10,000 pieces. You can maintain the time basis codes on Time Basis Codes. Time basis codes are user defined codes (30/TB).
Resource units	Shows the available amount of capacity in a work center for the months in the calendar. For lead time purposes, as the system calculates the operation start and due dates, the system uses the available hours to calculate the operation start dates. You can maintain the resource units in Work Center Resource Units.
Prime load code	Determines whether a work center is labor or machine intensive. The prime load code also determines whether the system uses the number of employees or number of machines to determine the daily resource units in the Resource Units table. You can maintain the prime load codes on Work Center Revisions. For calculating lead times, the following prime load code values are important: <ul style="list-style-type: none"> ▪ L = run labor hours ▪ M = machine labor hours ▪ B = run and setup hours ▪ C = machine and setup hours
Purchased parts	You specify the level lead time, which is equal to the cumulative lead time. By default, the manufacturing lead time, lead time per unit, total queue/move hours, and setup times for purchased parts are zero.

Work Order Start Dates

The system uses the level lead time or lead time per unit for an item defined on the Manufacturing Data screen to calculate the start date of a work order based on the order's due date.

Fixed Lead Time

When an item has a fixed lead time, the system uses its level lead time value in backscheduling to find the work order start date.

For example, the system generates a planned order for product 101 with a requested date of 10/15/17. The level lead time is 3 days for this product, so the system calculates the start date by counting back 3 working days on the shop floor calendar from (but not including) the requested date. The system assigns the order a start date of 10/12/17.

Variable Lead Time

When an item has a variable lead time, the system uses the following calculation to determine the lead time days:

$$\frac{(\text{Leadtime per unit} \times \text{order quantity} / \text{TMB}^*) + \text{setup} + \text{total queue/move}}{\text{Work hours per day}}$$

* The system reads the Time Basis Code from the Item Branch file (F4102).

For example, to determine the start date, the system counts back the lead time days from the due date of planned orders. The system backschedules the due date, 10/15, 2 days to determine the start date of 10/13.

$$(32 \times 1000 / 10,000) + 1 + 9 / 8$$

$$(3.2 + 10) / 8 = 2 \text{ days}$$

The following table shows the values used in this example.

Field	Value Used
Due date	10/15
Lead time per unit	32 hours
Order quantity	1000
Time Basis Code	10,000
Setup	1 hour
Total queue/move	9 hours
Work hours per day	From manufacturing constants

Operation Start and Due Dates

Fixed Lead Time

The system calculates the operation start and due dates with the average number of hours per operation.

If the work center resource calendar is not populated then all the operation start dates will be the same as the work order header start date.

If the work center resource calendar is populated then the hours are spread evenly across all the operations.

The system schedules the last operation due date on the day before the work order due date.

Variable Lead Time

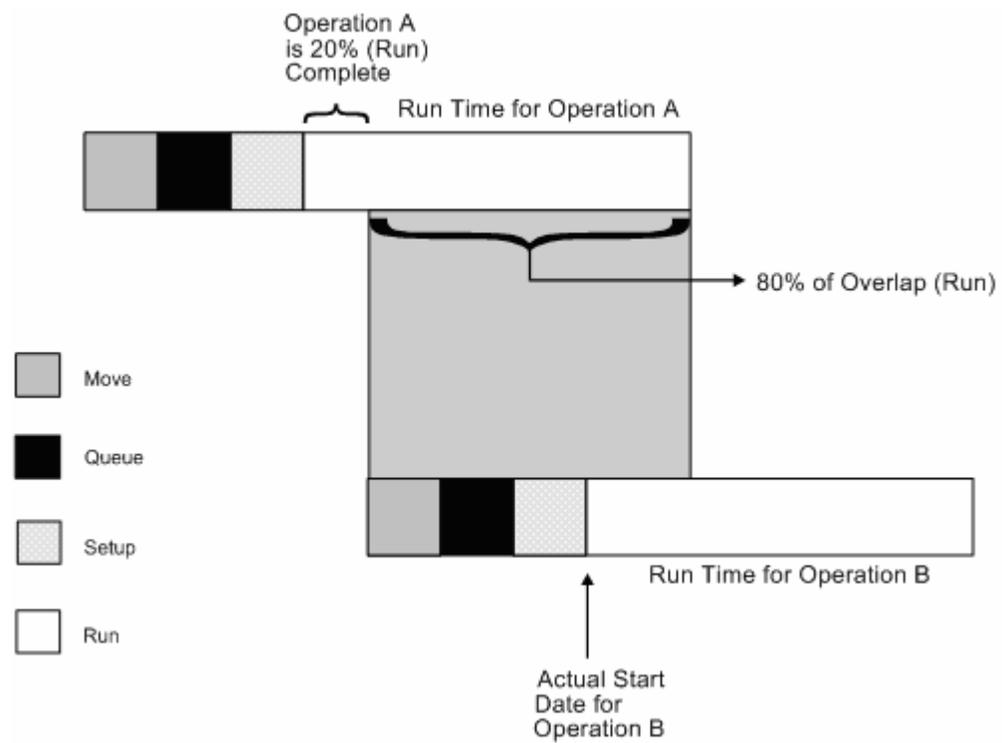
To determine variable lead times, the system schedules the actual hours from the work order routing instructions according to the same resource units rules for variable lead time.

The system uses the prime load code to determine what hours to use. The hours are then applied to the resource units table, similar to fixed lead time. The system applies queue time from the work order routing at the beginning of an operation, and applies move time at the end of an operation.

Overlapping Operations

One method to compress lead times is to overlap operations. Overlapping operations are two or more operations in a routing that process at the same time. The percent of overlap is the amount of time that these operations can process concurrently. You can define at what point a second operation can begin before the first operation is complete. Because of setup, move, and queue times, the actual overlap in run time might be less than the percent of overlap defined.

In the following example, Operation B has a percent of overlap of 80%. This means that Operation B can begin when 80% of Operation A remains to be finished, or when Operation A is 20% complete. Operations A and B are both active as they overlap.



If the percent of overlap causes an operation to end later than the last operation in the routing, the system issues an error message and enters the work order start and requested dates into each operation.

Overlapping and Concurrent Operations

If a percentage of overlap is specified in the Routing detail area, the work order routing includes specified operations that overlap. For example, an overlap percentage of 80% for an operation means that the next operation can start when 20% of the previous operation is complete.

Field	Value
Work order complete date	05/01/17
Last operation 20	24 hours
First operation 10	24 hours
Resource hours per day-per work center	8 hours
Operation overlap on 20	75%

Operation	Without overlap	With overlap
Operation 10		
start	04/27/17	04/27/17
complete	04/29/17	04/29/17
Operation 20		
start	04/30/17	04/27/17
complete	05/02/17	04/30/17

Using the data from the above tables, the system advances the complete date of the previous operation by 75% of 24 or 18 hours. The system then recalculates the start date using the normal back scheduling rules. As a result, operations 10 and 20 overlap and will take 24 hours to complete. The following diagram illustrates this concept.

Date	4/27	4/28	4/29	4/30	5/1	5/2
Resource hours	8	8	8	8	8	8
OP 10 (24 hrs)	<----	-----	---->			
OP 20 (24 hrs) (w/o overlap)				<----	-----	---->

Date	4/27	4/28	4/29	4/30	5/1	5/2
OP 10 (w/ overlap)	<----	-----	---->			
OP 20 (w/ overlap)	<-	-----	-----	-->		

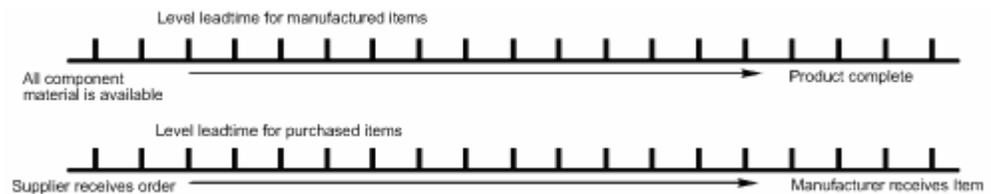
Calculating Lead Times

The Leadtime Rollup program calculation updates the following within the Plant Manufacturing Data program:

- Level lead time (if using manufacturing lead time quantity)
- Manufacturing lead time
- Cumulative lead time
- Per unit lead time
- Total queue/move hours
- Setup hours

Level Lead Time

For a manufactured product, level lead time is the number of workdays required to complete the product once all items are available. Level lead time for a purchased item is the number of calendar days required for you to receive the item after the supplier receives your purchase order.



Calculation

The system uses the following formula to calculate level lead time:

$$\text{SUM} \left[\frac{\{(M \text{ or } L / E \text{ or } M) / (EF \text{ or } UT \times \text{CUM Yield})\} \times \text{MLQ}}{\text{TIMB (from routing)}} \right] + \text{SETUP} + \text{TOTAL QUEUE \& MOVE}$$

Work Hours Per Day (from Mfg. Constants)

The following table defines the values used in the formula.

Value	Description
SUM	Sum of all operations
M or L	Either machine or labor hours based on the prime load code
E or M	Number of employees or machines in the work center
EF or UT	Efficiency or Utilization from the work center
Cum Yield %	From the Routing Master (F3003)
MLQ	Manufacturing lead time quantity
TIMB	Time basis
Setup	Setup time from the Routing Master (F3003)
Total Queue & Move	Queue plus Move time from routing master or work center

For example:

$$\left[\frac{\text{OP-10}}{\frac{\{(6/1) / (0.9 \times 0.72)\} \times 1}{1}} + \frac{\text{OP-20}}{\frac{\{(5/1) / (1 \times 0.72)\} \times 1}{1}} + \frac{\text{OP-30}}{\frac{\{(90/3) / (0.85 \times 0.80)\} \times 1}{100}} + \frac{\text{OP-40}}{\frac{\{(8/2) / (0.95 \times 1)\} \times 1}{1}} \right] + 4 + 22$$

8 Hours

$$\frac{9.26 + 6.94 + 0.44 + 4.21 + 4 + 22}{8 \text{ Hours}} = \frac{46.85 \text{ Hours}}{8 \text{ Hours}} = 5.86 \text{ or } 6 \text{ Days}$$

Manufacturing Lead Time

Manufacturing lead time is the total number of workdays required to complete a product, from its lowest-level items to the final item, assuming all purchased items are in house, which includes:

- Order preparation time
- Queue time
- Setup time
- Run time
- Move time
- Inspection time

- Putaway time

And, it is the total of the level lead time for a product plus the longest manufacturing lead time of any of its items.

Lead times for purchased items are not included in manufacturing lead time calculations. The manufacturing lead time for a purchased item is its level lead time.

- Manufacturing leadtime for manufactured items
- Final Item
- Start product

Calculation

The system uses the following formula to calculate manufacturing lead time.

Item F

Level LT = 1

Item G

Level LT = 3

Item D

Level LT = 4

Mfg LT = 4 + 0 = 4

Item E

Level LT = 3

Mfg LT = 3 + 0 = 3

Item C

Level LT = 4

Mfg LT = 4 + 4 = 8

Item B

Level LT = 7

Mfg LT = 7 + 0 = 7

Item A

Level LT = 2

Mfg LT = 2 + 8 = 10

Items A, B, C, D, and E are manufactured items.

Items F and G are purchased items.

Cumulative Lead Time

Cumulative lead time is the number of workdays that are required to acquire items and complete a product, from its lowest-level items to the final item, which is the level lead time for a product plus the longest cumulative lead time of any of its items. Unlike manufacturing lead time, cumulative lead time includes the lead times for purchased items. It covers both the time to acquire purchased items and the time to complete the product. The cumulative lead time for a purchased item is its level lead time.

Cumulative leadtime

Supplier receives
order

Complete product

Manufacturer
receives
item

Start product

Calculation

The system uses the following formula to calculate cumulative lead time.

Item F

Level LT = 1

Item G

Level LT = 3

Item D

Level LT = 4

Cume LT = 4 + 1 = 5

Item E

Level LT = 3

Cume LT = 3 + 3 = 6

Item B

Level LT = 7

Cume LT = 7 + 0 = 7

Item C

Level LT = 4

Cume LT = 4 + 6 = 10

Item A

Level LT = 2

Cume LT = 2 + 10 = 12

Items A, B, C, D, and E are manufactured items.

Items F and G are purchased items.

Per Unit Lead Time

Per unit lead time is the sum of the run times, as defined by the prime load codes for the work centers, factored by the routing time basis and converted to the lead time per unit. The per unit lead time sets valid start dates for orders planned in other than normal planned order quantity. When you run the leadtime rollup program, the system measures the per unit lead time in hours.

Calculation

The system uses the following formula to calculate per unit lead time.

$$\frac{\text{SUM } \{(M \text{ or } L / E \text{ or } M) / (EF \text{ or } UT \times \text{CUM Yield})\} \times \text{TIMB1}}{\text{TIMB2}}$$

The following table defines the values used in the formula.

Value	Description
SUM	Sum of all operations
M or L	Machine or labor hours based on the prime load code
E or M	Number of employees or machines from the work center
EF or UT	Efficiency or Utilization from the work center
Cum Yield	Cumulative Yield percentage from the routing
TIMB1	Time basis from Item Branch/Plant manufacturing data
TIMB2	Time basis from the Routing Master(F3003)

For example:

$$\frac{\{(6/1) / (0.9 \times 0.72)\} \times 1}{1} + \frac{\{(5/1) / (1 \times 0.72)\} \times 1}{1} + \frac{\{(90/3) / (0.85 \times 0.80)\} \times 1}{100} + \frac{\{(8/2) / (0.95 \times 1)\} \times 1}{1}$$

$$9.259 + 6.994 + 0.441 + 4.211 = 20.86 \text{ Hours per Unit}$$

Although overlap is not shown in the formulae, it does have an effect on all of the leadtime calculations. For example, if OP-20 had 100% overlap, the 6.994 hours would be completed at the same time OP-10 is running, therefore reducing the leadtime per unit by 6.994 hours. Factoring in this overlap to all the preceding calculations, the results would be as follows:

- Level Lead Time = 4.99 or 5 days
- Manufacturing Lead Time = 6 days
- Cumulative Lead Time = 13 days
- Lead Time Per Unit = 13.91 hours

Appendix C – Functional Servers

About Functional Servers

Several JD Edwards World programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values
- Field edits and valid values
- Error processing
- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.
- You can standardize documents across all applications because you create them using the same business rules.
- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

To set up business rules for an entry program

The steps for setting up business rules for an entry program are:

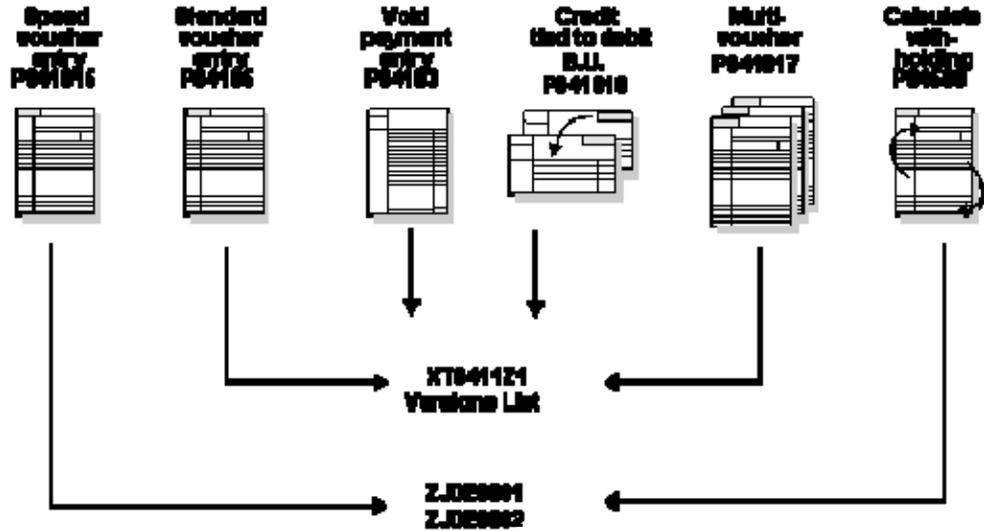
1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).
2. Set the processing options within the version according to your company requirements.
3. Specify the version you want the entry program to use in the processing options for that entry program.

You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. JD Edwards World provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.

Caution: Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the *Technical Foundation Guide*.

Example: Voucher Processing Functional Server

The following graphic shows the programs that use the voucher processing functional server. JD Edwards World provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.



Index

A

- A7.3
 - Configuration Management
 - processing work orders, 2-50
 - Engineering Change Orders
 - Enter/Change Order, 2-27
 - Order Processing, 2-49
 - Generic Text
 - Enter/Change Bill, 2-66
 - Enter/Change Routing, 2-66
 - Routing Revisions, 2-41
 - Work Order Parts List, 2-29
 - Parts List Comparison, 2-219
 - Quantity at Operation
 - Super Backflush, 2-185
 - Serial Number Tracking, 2-46, 2-141
 - Completions, 2-188
 - Substitute Availability
 - Enter/Change Order, 2-37
 - Summarized Journal Entries
 - Enter/Change Order, 2-16
 - Warehouse Picking Interface
 - Component Shortages, 2-130
 - Enter/Change Order, 2-16
 - Enter/Change Work Center, 4-25
 - features, 1-5
 - Inventory Issues, 2-139
 - Order Processing, 2-49, 2-50, 2-52
 - Routing Instructions, 2-41
 - system integration, 1-3
 - table, 1-8
 - Work Order Parts List, 2-30
- All Shortages report
 - sample, 2-131
- Alternate Line Selection form
 - scheduling items on a production line, 3-11
- Assembly inclusion rules
 - processing, 2-50
- Assign Issued Component LSN's (P3107)
 - form, 2-189, 2-192
- Assign Work Order LSN's (P3105)
 - form, 2-47
- Assigning serial numbers, 2-46
- Attaching the routing instructions interactively, 2-39
- Availability
 - reviewing, 2-121
- Availability reviewing, 2-123

B

- Back Order Release (P42117)
 - form, 2-173
- Backscheduling
 - overview, 2-12
- BOM Component Master Text (P0016)
 - window, 2-66

C

- Category Code 02 (P00051)
 - form, 4-8
- Category Code 03 (P00051)
 - form, 4-8
- Changing the status of a work order to closed, 2-196
- Closing rates
 - overview, 3-35
- Commitments
 - activating substitution checking, 2-59
 - creating for potent units, 2-69
 - defining rules for work orders, 2-59
 - defining where they are made, 2-63
 - hard, 2-56
 - inventory interfaces when reposting, 2-72
 - manage for grade and potency, 2-68
 - overview, 2-55
 - process, 2-57
 - reposting open and on-order quantities, 2-72
 - soft, 2-56
 - work with, 2-59
- Completing a work order through backflush, 2-171
- Completing a work order with serialized components, 2-188
- Completing a work order without backflushing, 2-169
- Completing partial quantities on a work order, 2-176
- Completing rates
 - Completions Workbench form, 3-16
 - Inventory Issues form, 3-18
 - overview, 3-15
 - quality management test results, 3-15
- Completing work orders, 2-167
- Completion with Backflush (P31114)
 - form, 2-172

Completions
 partial quantities on work orders, 2-176
 warehouse management system interface, 2-169
 work orders, 2-167
 work orders through backflush, 2-171
 work orders without backflushing, 2-169
 Completions Workbench form
 completing rates, 3-16
 Component Item Substitutions (P31042)
 form, 2-36
 Component Scrap (P31116)
 fold area, 2-146
 form, 2-145
 Component Shortages
 report, 2-130
 Component Shortages report
 generating, 2-130
 sample, 2-130
 Component Useability (P30201)
 fold area, 2-210
 form, 2-209
 overview, 2-207
 Creating lots, 2-80

D

Defining availability calculations for a branch, 2-121
 Defining commitment rules, 2-59
 Defining commitments at a work center location, 2-63
 Discrete manufacturing
 overview, 2-1
 Dispatch List report
 generating, 2-152
 Document type codes
 setting up, 4-3, 4-9
 Duplicate lot processing, *See* Lot processing

E

Employee Labor Rates (P00191)
 form, 4-13
 Enter Receipts by PO (P4312)
 form, 2-9
 Enter/Change Bill (P3002)
 fold area, 2-65
 form, 2-65
 Enter/Change Order
 processing options, 2-28
 Enter/Change Order (P48013)
 form, 2-16, 2-197
 Enter/Change Rate Schedule form
 sample, 3-4
 Enter/Change Resource Units (P3007)
 form, 4-30
 generating, 4-29

 refreshing information, 4-29
 Enter/Change Routing (P3003)
 form, 2-64
 using generic text, 2-66
 Enter/Change Work Center (P3006)
 form, 4-26
 maintaining business units and tracking costs, 4-25
 maintaining rates, 4-25
 system calculations, 4-24
 Warehouse Management interface, 4-25
 Entering hours and quantities manually, 2-156
 Entering hours and quantities through payroll time entry, 2-159
 Entering rates
 Enter/Change Rate Schedule form, 3-4
 line/item relationship, 3-7
 overview, 3-3
 production lines, 3-7
 Entering work order headers, 2-15

F

Features
 hours and quantities tracking, 1-3
 manufacturing accounting, 1-5
 material tracking, 1-5
 process/routing instructions, 1-4
 production scheduling and tracking, 1-4
 reporting, 1-5
 work order creation, 1-4
 Fixed leadtime
 example, 6-6
 Forms
 Alternate Line Selection, 3-11
 Assign Issued Component LSN's (P3107), 2-189, 2-192
 Assign Work Order LSN's (P3105), 2-47
 Back Order Release, 2-173
 BOM Component Master Text, 2-66
 Category Code 02, 4-8
 Category Code 03, 4-8
 Completion with Backflush, 2-172
 Completions Workbench, 3-16
 Component Item Substitutions, 2-36
 Component Scrap, 2-145
 Component Useability, 2-209
 Employee Labor Rates, 4-13
 Enter Receipts by PO, 2-9
 Enter/Change Bill, 2-65
 Enter/Change Order, 2-16, 2-197
 Enter/Change Rate Schedule, 3-4
 Enter/Change Resource Units, 4-30
 Enter/Change Routing, 2-64
 Enter/Change Work Center, 4-26
 General Message, 4-13
 General User Defined Codes, 2-70

General User-defined Codes, 4-10
 Hours & Quantities, 2-186
 Hours and Quantities, 2-156, 2-163, 2-183
 Inventory Issues, 2-142, 3-18
 Item Availability Definition, 2-122
 Item Branch/Plant Information, 2-60, 2-77
 Item Ledger, 2-216
 Item Ledger - amount/quantity format, 2-217
 Item Ledger - running balance, 2-217
 Item Master Information, 2-84
 Kanban Consumption, 2-201, 3-29
 Kanban Supply, 2-203, 3-31
 Line Dispatch List, 3-23
 Line Scheduling Workbench, 3-10
 Line Sequencing Workbench, 3-12
 Location Lot Status Change, 2-106
 Lot Availability, 2-94
 Lot Dates, 2-104
 Lot Master Revisions, 2-89
 Lot Status Codes, 2-105
 Lot Tracing, 2-109
 Manufacturing Constants, 2-61, 2-67, 4-18
 Operation Status, 4-9
 Part Availability, 2-123
 Partial Completion, 2-170, 2-177
 Parts List Comparison, 2-220
 Parts List Inquiry, 2-125
 Payroll Time Entry, 2-161
 Phase, 4-7
 Priority, 4-5
 Production History, 3-23
 Production Status, 3-22
 Reclassifications, 2-117
 Revision Level, 2-27
 Routing Revisions, 2-12, 2-42
 Routing/Analysis Revisions, 2-176
 Schedule Review, 3-14
 Select Multiple Locations, 2-39, 2-144, 2-179
 Shop Floor Calendar, 4-15
 Shop Floor Workbench, 2-149
 Shortage Maintenance, 2-128
 Shortage Workbench, 2-127
 Speed Lot Update, 2-103
 Split Lines, 3-11
 Standard Procedures, 4-12
 Standard Units of Measure, 2-71
 Status, 4-6
 Substitute Availability, 2-38
 Summary Availability, 2-211
 Super Backflush, 2-180
 Supply/Demand Inquiry, 2-212
 Track/Track Inclusion Rules, 2-112
 Type, 4-4
 Work Order - Category Codes, 2-21
 Work Order Completion, 2-183
 Work Order Detail Entry, 2-20
 Work Order Inventory Issues, 2-173, 2-182

Work Order Parts List, 2-30
 Work Order Record Types, 2-20

G

General Message (P00192)
 form, 4-13
 General User Defined Codes (P00051)
 fold area, 2-70
 form, 2-70
 General User-defined Codes (P00051)
 form, 4-10

H

Hours
 enter manually, 2-156
 enter through Payroll Time Entry, 2-159
 overview, 2-153
 process, 2-160
 reviewing transactions, 2-165
 update, 2-162
 Hours & Quantities (P311221)
 fold area, 2-187
 form, 2-186
 Hours and Quantities (P311221)
 fold area, 2-157
 form, 2-156, 2-163, 2-183
 Hours and Quantities Proof report
 generating, 2-165
 sample, 2-165

I

Inclusion rules
 lot tracing/tracking, 2-111
 Integration
 with Enterprise Requirements Planning and
 Execution, 1-9
 with Purchase Order Management, 1-12
 with Sales Order Management, 1-11
 Inventory Issues (P31113)
 fold area, 2-143
 form, 2-142
 Inventory Issues form
 completing rates, 3-18
 Issue inventory
 backflushing, 2-134
 closing out materials, 2-141
 for a parent quantity, 2-141
 location, 2-135
 manually, 2-134
 overview, 2-133
 preflushing, 2-134, 2-140
 process, 2-137
 reversing a transaction, 2-141
 super backflushing, 2-134

- tables that store data, 2-136
 - Issues
 - Warehouse Management interface, 2-139
 - Issuing inventory
 - assigning serial numbers, 2-141
 - associating components, 2-141
 - Issuing materials, 2-139
 - Issuing materials by preflushing, 2-140
 - Item
 - define availability calculation for a branch, 2-121
 - manage shortage information, 2-126
 - record component scrap, 2-144
 - reviewing availability and shortages, 2-121
 - Item Availability Definition (P410011)
 - form, 2-122
 - Item Branch/Plant Information (P41026)
 - form, 2-60, 2-77
 - Item Ledger (P4111)
 - form, 2-216
 - form - amount/quantity format, 2-217
 - form - running balance, 2-217
 - overview, 2-214
 - using the running balance format, 2-215
- ## K
- Kanban Consumption form
 - sample, 2-201, 3-29
 - Kanban Supply form
 - sample, 2-203, 3-31
- ## L
- Labor hours
 - leadtime concepts, 6-4
 - Leadtime
 - calculating, 6-9
 - calculating cumulative leadtime, 6-11
 - calculating level leadtime, 6-9
 - calculating manufacturing leadtime, 6-10
 - factors, 6-3
 - fixed, 6-5, 6-7
 - operation start and due dates, 6-6
 - overlapping and concurrent operations, 6-8
 - overview, 6-4
 - types, 6-4
 - variable, 6-6, 6-7
 - work order start dates, 6-5
 - Line Dispatch List form
 - reviewing line dispatch list, 3-23
 - Line Scheduling Workbench form
 - scheduling items on a production line, 3-10
 - Line Sequencing Workbench form
 - scheduling rates by classification scheme or manually, 3-12
 - Location Lot Status Change form
 - sample, 2-106
 - Lot, *See* Lot processing
 - Lot Availability form
 - sample, 2-94
 - Lot control
 - grade and potency overview, 2-75
 - Lot Dates form
 - sample, 2-104
 - Lot Dates program (P00051), 2-104
 - Lot Master Revisions form
 - sample, 2-89, 2-97
 - Lot Master Revisions program (P4108), 2-89, 2-97
 - Lot processing
 - entering lot information
 - creating a lot, 2-89
 - duplicate lots, 2-88
 - entering lot control information, 2-90
 - entering lot information for items, 2-83
 - entering supplier information, 2-91
 - Item Master Information form, 2-84
 - Lot Master Revisions form, 2-89
 - overview, 2-79
 - reclassifying lots
 - bulk inventory, 2-117
 - correcting errors, 2-116
 - document numbers, 2-116
 - example, 2-115
 - grouping reclassifications, 2-116
 - Reclassifications form, 2-117
 - uncommitted quantities, 2-117
 - viewing lot availability, 2-93
 - Lot Availability form, 2-94
 - viewing lot transactions
 - Lot Tracing form, 2-109
 - Lot Tracing report, 2-108
 - Lot Tracking report, 2-108
 - setting up trace/track inclusions rules, 2-111
 - Trace/Track Inclusion Rules form, 2-112
 - working with lot activity dates, 2-99
 - changing activity dates for a single lot, 2-100
 - changing activity dates for multiple lots, 2-103
 - Lot Dates form, 2-104
 - Lot Master Revisions form, 2-100
 - Speed Lot Update form, 2-103
 - tracking lot dates, 2-104
 - working with lot quantities, 2-96
 - Lot Master Revisions form, 2-97
 - reviewing lot quantities, 2-97
 - tracking lot quantities, 2-98
 - working with lot statuses
 - assigning status codes to different lot locations, 2-106
 - Location Lot Status Change form, 2-106
 - Lot Status Codes form, 2-105
 - setting up lot status codes, 2-105
 - Lot Status Codes form
 - sample, 2-105
 - Lot Status Codes program (P00051), 2-105
 - Lot Tracing form
 - sample, 2-109
 - Lot Tracing report

sample, 2-108
 Lot Tracing/Tracking program (P41203), 2-109
 Lot Tracking report
 sample, 2-108
 Lots
 overview of creating, 2-80
 overview of status, 2-80

M

Machine hours
 leadtime concepts, 6-4
 Managing commitments for grade and potency
 controlled items, 2-68
 Managing shortage information, 2-126
 Manufacturing Accounting
 summarized work orders, 2-16
 Manufacturing Constants (P3009)
 form, 2-61, 2-67, 4-18
 Manufacturing Work Order Entry
 processing options, 2-28
 Materials
 issuing, 2-139
 issuing by preflush, 2-140
 Move hours
 leadtime concepts, 6-5

O

Operation start and due dates
 fixed leadtime, 6-7
 variable leadtime, 6-7
 Operation Status (P00051)
 form, 4-9
 Operation status codes
 setting up, 4-3, 4-8
 Operations
 overlapping, 6-7
 Outside operations
 usage, 2-9

P

Part Availability (P30205)
 form, 2-123
 Partial Completion (P31114)
 form, 2-170, 2-177
 Parts list
 assigning interactively, 2-28
 attaching by batch, 2-29
 attaching manually, 2-28
 copying from one work order to another, 2-29
 overview, 2-7
 phantom items, 2-8
 regenerating, 2-50
 reviewing comparison, 2-219
 Parts List Comparison (P31117)

form, 2-220
 Parts List Inquiry (P3121)
 fold area, 2-125
 form, 2-125
 Payroll Time Entry (P061181)
 form, 2-161
 Phantom items
 usage, 2-8
 Phase (P00051)
 form, 4-7
 Prime load code
 leadtime concepts, 6-5
 Printing all shortages, 2-131
 Printing component shortages, 2-130
 Printing scheduling information for work centers,
 2-152
 Printing the supply and demand report, 2-213
 Priority (P00051)
 form, 4-5
 Priority codes
 setting up, 4-3, 4-5
 Processing a work order using quantity at
 operation, 2-185
 Processing kanban consumption by item
 Kanban Consumption form, 2-201, 3-29
 overview, 2-200, 3-28
 Processing kanban supply by item, 2-202, 2-206, 3-
 30, 3-34
 Kanban Supply form, 2-203, 3-31
 Processing kanbans
 consumption by item, 2-200, 3-28
 one-phase mode, 2-199, 3-27
 supply by item, 2-202, 2-206, 3-30, 3-34
 two-phase mode, 2-199, 3-27
 Processing options
 Enter/Change Order, 2-28
 Manufacturing Work Order Entry, 2-28
 Work Order Generation - Print and Automatic
 Issue, 2-53
 Processing work orders, 2-49
 Production History form
 reviewing production history, 3-23
 Production Status form
 reviewing production status, 3-22
 Programs and IDs
 P00051 (category code 02), 4-8
 P00051 (category code 03), 4-8
 P00051 (general user defined codes), 2-70
 P00051 (general user-defined codes), 4-10
 P00051 (lot dates), 2-104
 P00051 (lot status codes), 2-105
 P00051 (operation status), 4-9
 P00051 (phase), 4-7
 P00051 (priority), 4-5
 P00051 (status), 4-6
 P00051 (trace/track inclusion rules), 2-112
 P00051 (type), 4-4

- P00071 (shop floor calendar), 4-15
 - P0016 (bom component master text), 2-66
 - P00191 (employee labor rates), 4-13
 - P00191 (standard procedures), 4-12
 - P00192 (general message), 4-13
 - P061181 (payroll time entry), 2-161
 - P3002 (enter/change bill), 2-65
 - P3003 (enter/change routing), 2-64
 - P3006 (enter/change work center), 4-26
 - P3007 (enter/change resource units), 4-30
 - P3009 (manufacturing constants), 2-61, 2-67, 4-18
 - P30201 (component useability), 2-209
 - P30205 (part availability), 2-123
 - P30BREV (revision level), 2-27
 - P31042 (component item substitutions), 2-36
 - P3105 (assign work order LSN's), 2-47
 - P3107 (assign issued component LSN's), 2-189, 2-192
 - P3109 (enter/change rate schedule), 3-4
 - P3111 (work order parts list), 2-30
 - P31113 (inventory issues), 2-142, 3-18
 - P31113 (work order inventory issues), 2-173, 2-182
 - P31114 (completion with backflush), 2-172
 - P31114 (partial completion), 2-170, 2-177
 - P31114 (work order completion), 2-183
 - P31116 (component scrap), 2-145
 - P31117 (parts list comparison), 2-220
 - P3111S (substitute availability), 2-38
 - P3112 (routing revisions), 2-12, 2-42
 - P311221 (hours & quantities), 2-186
 - P311221 (hours and quantities), 2-156, 2-163, 2-183
 - P31123 (super backflush), 2-180
 - P3118 (shortage maintenance), 2-128
 - P3119 (completions workbench), 3-16
 - P3121 (parts list inquiry), 2-125
 - P31225 (shop floor workbench), 2-149
 - P31226 (production status), 3-22
 - P31227 (production history), 3-23
 - P3128 (shortage workbench), 2-127
 - P3152 (schedule review), 3-14
 - P3153 (line scheduling workbench), 3-10
 - P3154W (split lines), 3-11
 - P3155W (alternate line selection), 3-11
 - P3156 (line sequencing workbench), 3-12
 - P3157 (kanban consumption), 2-201, 3-29
 - P3158 (kanban supply), 2-203, 3-31
 - P3159 (line dispatch list), 3-23
 - P3191 (close rates), 3-35
 - P4021 (supply/demand inquiry), 2-212
 - P410011 (item availability definition), 2-122
 - P41003 (standard units of measure), 2-71
 - P4101 (item master information), 2-84
 - P41026 (item branch/plant information), 2-60, 2-77
 - P4108 (lot master revisions), 2-89, 2-97, 2-100
 - P41080 (speed lot update), 2-103
 - P4108S (location lot status change), 2-106
 - P4111 (item ledger - amount/quantity format), 2-217
 - P4111 (item ledger - running balance), 2-217
 - P4111 (item ledger), 2-216
 - P4116 (reclassifications), 2-117
 - P41202 (summary availability), 2-211
 - P41203 (lot tracing), 2-109
 - P41280 (lot availability), 2-94
 - P42053 (select multiple locations), 2-39, 2-144, 2-179
 - P42117 (back order release), 2-173
 - P43090 (routing/analysis revisions), 2-176
 - P4312 (enter receipts by PO), 2-9
 - P48002 (work order record types), 2-20
 - P48013 (enter/change order), 2-16, 2-197
 - P48016 (work order - category codes), 2-21
 - P4802 (work order detail entry), 2-20
 - Purchased parts
 - leadtime concepts, 6-5
 - Purging a work order, 2-197
- ## Q
- Quantities
 - entering manually, 2-156
 - entering through Payroll Time Entry, 2-159
 - non-pay-points, 2-188
 - overview, 2-153
 - process, 2-160
 - reviewing transactions, 2-165
 - updating, 2-162
 - Queue hours
 - leadtime concepts, 6-5
- ## R
- Reclassifications, *See* Reclassifying inventory
 - Reclassifications form
 - sample, 2-117
 - Reclassifying inventory
 - overview, 2-115
 - Recording component scrap, 2-144
 - Repetitive manufacturing
 - overview, 3-1
 - Reports
 - All Shortages, 2-131
 - Component Shortages, 2-130
 - Hours and Quantities Proof, 2-165
 - Lot Tracing, 2-108
 - Lot Tracking, 2-108
 - Supply and Demand, 2-214
 - Work Order Summary, 2-53
 - Resource units
 - leadtime concepts, 6-5
 - Reviewing availability, 2-123

- Reviewing availability and shortages, 2-121
 - Reviewing hours and quantities transactions, 2-165
 - Reviewing item ledger information, 2-214
 - Reviewing line dispatch list
 - Line Dispatch form, 3-23
 - overview, 3-23
 - Reviewing material information, 2-207
 - Reviewing parts list comparison, 2-219
 - Reviewing production across lines
 - overview, 3-13
 - Schedule Review form, 3-14
 - Reviewing production history
 - overview, 3-23
 - Reviewing production status
 - overview, 3-21
 - Production History form, 3-23
 - Production Status form, 3-22
 - Reviewing rate information
 - line dispatch list, 3-23
 - production history, 3-23
 - production status, 3-21
 - Reviewing work order information, 2-149
 - Revising the status of a work order, 2-195
 - Revising work order information, 2-151
 - Revision Level (P30BREV)
 - window, 2-27
 - Routing instructions
 - assigning interactively, 2-39
 - attaching manually, 2-40
 - attaching using batch, 2-40
 - changing the status, 2-40
 - deleting an outside operation, 2-40
 - locating, 2-40
 - outside operations, 2-9
 - overview, 2-9
 - regenerating, 2-51
 - Warehouse Management interface, 2-52
 - Routing Revisions (P3112)
 - fold area, 2-12, 2-43
 - form, 2-12, 2-42
 - using generic text, 2-41
 - using the Warehouse Management system, 2-41
 - Routing/Analysis Revisions (P43090)
 - form, 2-176
- S**
- Schedule Review form
 - reviewing production across lines, 3-14
 - Scheduling items on a production line
 - Alternate Line Selection form, 3-11
 - Line Scheduling Workbench form, 3-10
 - overview, 3-9
 - Split Lines form, 3-11
 - Scheduling rates
 - quality management test results, 3-9
 - reviewing production across lines, 3-13
 - scheduling items on a production line, 3-9
 - sequencing rates by classification scheme or manually, 3-12
 - Scheduling rates by classification scheme or manually
 - Line Sequencing Workbench form, 3-12
 - Scheduling work orders, 2-147
 - Select Multiple Locations (P42053)
 - form, 2-39, 2-144, 2-179
 - Sequencing rates by classification scheme or manually
 - overview, 3-12
 - Serial numbers
 - assigning to work order components, 2-46
 - Setting up document type codes, 4-3, 4-9
 - Setting up employee labor rates, 4-13
 - Setting up manufacturing constants, 4-17
 - Setting up operation status codes, 4-3, 4-8
 - Setting up priority codes, 4-3, 4-5
 - Setting up resource units, 4-29
 - Setting up standard procedures, 4-11
 - Setting up the shop floor calendar, 4-14
 - Setting up type codes, 4-3
 - Setting up work centers, 4-24
 - Setup hours
 - leadtime concepts, 6-4
 - Shop Floor Calendar (P00071)
 - deleting a branch calendar, 4-14
 - form, 4-15
 - system defaults, 4-14
 - Shop Floor Control
 - features, 1-3
 - menu overview, 1-14
 - process flow, 1-6
 - system integration, 1-2
 - system setup, 4-1
 - transactions, 2-3
 - types of manufacturing, 1-9
 - using units of measure, 2-2
 - Shop Floor Workbench (P31225)
 - form, 2-149
 - Shop paperwork
 - overview, 2-12
 - Shortage Maintenance (P3118)
 - fold area, 2-129
 - form, 2-128
 - Shortage Workbench (P3128)
 - form, 2-127
 - Shortages
 - entering, 2-121
 - report, 2-131
 - reports, 2-130
 - reviewing, 2-121
 - Warehouse Management interface, 2-130
 - Speed Lot Update form
 - sample, 2-103
 - Speed Lot Update program (P41080), 2-103

Split Lines form
 scheduling items on a production line, 3-11

Standard Procedures (P00191)
 form, 4-12

Standard Units of Measure (P41003)
 form, 2-71

Start date
 calculations, 2-11

Status (P00051)
 form, 4-6

Substitute Availability (P31115)
 form, 2-38

Summary Availability (P41202)
 form, 2-211
 overview, 2-207

Super Backflush (P31123)
 fold area, 2-181
 form, 2-180
 operation numbers, 2-184

Supply and Demand
 report, 2-214

Supply and Demand report
 sample, 2-214

Supply/Demand (P4021)
 overview, 2-208

Supply/Demand Inquiry (P4021)
 demand quantities, 2-213
 fold area, 2-213
 form, 2-212
 supply quantities, 2-213

System integration, *See* Integration

System setup
 document type codes, 4-3, 4-9
 employee labor rates, 4-13
 manufacturing constants, 4-17
 objectives, 4-1
 operation status codes, 4-3, 4-8
 priority codes, 4-3, 4-5
 resource units, 4-29
 shop floor calendar, 4-14
 standard procedures, 4-11
 type codes, 4-3
 work centers, 4-24

T

Time basis code
 leadtime concepts, 6-5

Trace/Track Inclusion Rules form
 sample, 2-112

Tracing
 lots
 inclusion rules, 2-111

Tracking
 lots
 inclusion rules, 2-111

Transactions
 reclassifications, 2-115

Type (P00051)
 form, 4-4

Type codes
 setting up, 4-3

U

Units of measure
 usage, 2-2

Updating hours and quantities, 2-162

W

Work center
 print scheduling information, 2-152

Work Order - Category Codes (P48016)
 form, 2-21

Work Order Completion (P31114)
 form, 2-183

Work Order Detail Entry (P4802)
 form, 2-20

Work Order Generation - Print and Automatic Issue
 processing options, 2-53

Work Order Inventory Issues (P31113)
 form, 2-173, 2-182

Work Order Parts List (P3111)
 fold area, 2-31
 form, 2-30
 using generic text, 2-29
 using Warehouse Management interface, 2-30

Work Order Record Types (P48002)
 form, 2-20

Work order start dates
 fixed leadtime, 6-5
 variable leadtime, 6-6

Work Order Summary report
 sample, 2-53

Work orders
 adding description details, 2-16
 assign parts list, 2-7
 assign parts list interactively, 2-28
 assign routing instructions, 2-9
 assign routing instructions interactively, 2-39
 assigning serial numbers, 2-46
 assigning serial numbers during issues, 2-141
 associating components during issues, 2-141
 backscheduling, 2-12
 changing the status to 'closed', 2-196
 choosing substitutes, 2-37
 committing inventory overview, 2-55
 completing, 2-167, 2-179
 completing partial quantities on work orders, 2-176
 completing through backflush, 2-171
 completing without backflushing, 2-169
 deleting, 2-196

- entering a purchase order for outside operations, 2-40
- entering revision level, 2-27
- entering work order headers, 2-15
- item records, 2-41
- locating related sales order information, 2-16
- naming saved purged records, 2-197
- overlapping operations, 6-7
- overview, 2-5
- process, 2-49
- processing assembly inclusion rules, 2-50
- reorganizing tables when purging, 2-198
- reviewing information, 2-149
- revising information, 2-151
- revising the status, 2-195
- scheduling, 2-147
- shop paperwork, 2-12
- start date calculations, 2-11
- summarized in Manufacturing Accounting, 2-16
- using OPNQRYF when purging, 2-198
- Working with commitments, 2-59
- Working with hours and quantities, 2-153