



Instructions Provided by Prelude. Approved For Use by Mark Blumenfeld 7/19/2016

Work Order Module - Basic Training

Before a product can be entered on a Work Order, there must first be a "Bill Of Materials" (BOM). In order to set up a BOM, the item must first exist as a valid product on the system. To do that, the process is:

Product Maintenance (Slash Command: /PM)

Once the product is created, the Bill Of Materials can be created. The process is:

Bill Of Material Maintenance (Slash Command: /BOMM)

When creating a new Bill Of Materials the BOM header is the first screen presented to the user after entering the product code. "Assembly Days" will be defaulted to '7' and "Bill Type" will be defaulted to 'R'-Regular. These defaults are acceptable for basic training purposes. Pressing F2 saves the header information and brings the user to the BOM line item screen.

(If the BOM already exists, the user will be in the line item screen after starting /BOMM. To access the header screen, press F5.)

Any valid product code can be entered as a BOM line item component. If the component being entered has a bill of materials, a '*' will be displayed in the "Asm" (Assembly(s)) field. The system enters the Unit of Measure as found in the product record for the component. The user enters the quantity of the component needed to produce 1 finished BOM item (fractional quantities are acceptable.) After entering all component line items, pressing F2 saves the Bill Of Materials.

(The Bill Of Materials is the same for all warehouses; however, a BOM may be modified during Work Order Entry.)

Before the BOM item can be used in Sales Order Entry or Work Order Entry, the product code must first exist as a valid item in each warehouse where it will be used. To do that, the process is:

Product Warehouse Maintenance (Slash Command: /PWM)



Enter the product number, then the warehouse number. The most important fields to deal with initially are "Status Code" and "Replenishment Method". "Status Code" is found on the first screen. It should be set to either 'S'-Stock, or 'N'-Non-Stock, whichever is appropriate in your warehouse.

"Replenishment Method" is found by pressing 'F6-Purch Param' from the main screen. Initially, the replenishment method will be set to 'P'-Purchase. For a manufactured item, the replenishment method should be changed to 'M'. This will result in a box being displayed that prompts for:

"Planner" - which is mandatory and can be any valid Buyer ID on the system. This field is used to group items by planner on the Recommended Work Order Reports.

"Production Multiple" - which is also mandatory, and can be any number ('1' is usually reasonable to begin with.

The other two fields - "Production Minimum Months" and "Production Group" are not mandatory, and are not needed for basic training purposes.

Setting the replenishment method to 'M' tells the system that inventory of this product becomes "available" in this warehouse is through the Work Order procedure. This is basically a three-step process:

- Work Order Entry
- Work Order Issues Entry
- Work Order Completion

Work Order Entry (Slash Command: /WOE)

This step creates a "Work Order Ticket" used to gather the components necessary to complete the BOM 'parent'. If the stock status of a finished good item is "N", a sales order must first be ordered before a work order can be created. Depending on company and user setup, this can be done automatically during Sales Order Entry. This creates a "linked" work order. A work order can be manually linked using the following procedure:

- Launch Work Order Entry with /WOE
- Accept "NEW" to generate a new work order with the next sequential number
- In the "Bill Number" field, enter - Sxxxxxx/y - where "xxxxxx" is the sales order number of containing the BOM item and "y" is the specific line number on that sales order..



Depending on company and user set-up, work order release may or may not be automatic after work order entry. If it is not automatic, "entered" work orders may be reviewed and released through "**Work Order Release Inquiry**" (/WORI).

If printing of work orders is flagged "continuous", a work order ticket will print automatically after the work order is released, provided at least one component is at least partially pickable. If printing is not continuous, work orders are printed manually with "**Work Order Printing**" (/WOP). The user enters the warehouse number, work order number and the desired printer form queue. The system then prints the work order and assigns it a release number. (If work order number is left blank, all previously unprinted work orders will print.)

Work Order Issues Entry (Slash Command: /WOIE)

This step "issues" the components from finished goods inventory to work-in-process. The user enters the the work order "release" number, the process date, and the amount of each component issued to the work order. If the actual quantities issued do not deviate from the quantities required by the BOM, the entire release may be issued by pressing F2 after entering the process date. Alternately, override quantities can be entered line by line.

Work Order Completion (Slash Command: /WOC)

The final step indicates that the manufacturing is complete, and the parent item is now available for other transactions. The user enters the work order number, the completion date, the ID of the user completing the work order and the completion quantity. If the work order is linked to a sales order, the product is immediately allocated to that sales order. If the work order is unlinked, the product goes into finished goods, and is allocated to existing open orders according to normal allocation rules.

Related Process IDs:

BM	Buyer Maintenance
BOMI	Bill Of Material Inquiry
BOMM	Bill Of Material Maintenance
IAE	Inventory Adjustment Entry
IARM	Inventory Adjustment Reason Maintenance
II	Inventory Inquiry
OLI	Order (Sales) Log Inquiry
PI	Product Inquiry
PLI	Purchase Log Inquiry
POHI	Purchase Order History Inquiry
PM	Product Maintenance
PTP	Pick Ticket Printing (when in non-continuous printing mode)
PWM	Product Warehouse Maintenance



PWI	Product Warehouse Inquiry
RCE	Release Confirmation Entry
SOE	Sales Order Entry
TAI	Transaction Audit Inquiry
TLI	Transfer Log Inquiry
WLI	Work Order Log Inquiry
WOC	Work Order Completion
WOE	Work Order Entry
WOI	Work Order Inquiry
WOIE	Work Order Issues Entry
WOP	Work Order Printing (when in non-continuous printing mode)
WORI	Work Order Release Inquiry