



Work Order Overview Document

for Sage 100 ERP

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Introduction

This document includes overview information about each task in the Work Order module that is accessible from the menus. You can print this document to use as an offline reference.

The information in this document is also available in the Help system in the overview Help topics.

For additional information about the software, refer to the Help system, which also includes the following:

- Overview information for windows that cannot be accessed directly from menus
- Procedures that guide you step-by-step through common activities
- Explanations of important concepts
- Field descriptions
- Flowcharts
- FAQs

Main Menu

Work Order Entry

Navigation

Select Work Order Main menu > Work Order Entry.

Overview

Use Work Order Entry to create and maintain work orders. A work order is used to authorize shops to manufacture subassemblies and finished products, and details how subassemblies and products are manufactured. By entering a work order, you define what material and processes are required to manufacture the product. Work Order Entry brings together material plans defined using the Bill of Materials module with the manufacturing plans defined in Routing Maintenance to create a complete plan for manufacturing the product.

Before entering work orders, if you are currently using a manual work order system or a different computerized system, you will need to perform certain preliminary data entry procedures to ensure that your system is current.

In the process of entering the work order, standard time and cost information are calculated to determine the planned costs to use to measure the efficiency of the manufacturing process. The planned costs are compared against the actual cost recorded against the work order to provide variances from standard costs.

In addition to standard work orders, Work Order Entry allows you to enter work order templates, which are used for creating standard work orders. Work order estimates can also be entered to determine the time required to build an item and its associated costs. Estimates will not commit the quantity required for the work order for the components. After an estimate has been created, it can be printed on work order travelers, picking sheets, dispatch sheets, operation tickets, the Open Work Order Report, and the Scheduled Capacity Report. To convert the estimate to a firm-planned work order, recall the estimate by work order number and change the status to "firm planned." The inventory quantity required for the work order for the components is adjusted at this time.

A work order can be completed to inventory, work order, or sales order when work order completion transactions in Work Order Transaction Entry are processed.

Work Order Entry allows you to specify the product to be manufactured (such as the parent item), the number of products needed, the purpose for which the products are produced, and the due date.

You can also enter additional header information about the work order. If you know when you want to release the work order, but want to determine when the finished product will be completed, do not enter a due date, and type the scheduled release date. This causes the Forward scheduling method to be used to calculate the total amount of time needed to complete the finished product.

If you are entering a work order template, you cannot enter the following data:

- Status Comment
- Due Date
- Lead Time
- Sched Release
- Order on Hold

Work Order Entry allows you to enter the operational step information necessary to manufacture the product for the work order. Each step identifies the operation to be performed and the work center where it will be performed.

NOTE At least one step number must be entered for each work order before the materials and scheduling can be entered.

After a work order is released in Work Order Transaction Entry, you cannot delete a step, but you can modify the standard run type, run time (hours per lot, hours per operation, or operations per hour), parent item type, or factor for the step in order to change its extended time to 0 (zero). New substeps cannot be created; they are created automatically when phantom bills or bills with options are merged from the Bill of Materials module.

You can also enter one or more material components required to manufacture the product for a work order. Each line item represents material to be issued to the current work order for the manufacture of the finished product. You can enter and maintain as many line items as you want. Line entries referencing completed steps cannot be modified.

The process of entering material items builds only one bill level at a time. If the finished product is made up of subassemblies, those subassemblies must be manufactured from other work orders or pulled from inventory. Component item information for the current work order is displayed for editing purposes if you are copying from a work order, from a work order template, or if you entered a bill number. If a bill number is entered, a single-level bill explosion with phantom blow-through is performed after you save the work order. This means that the components for the bill appear as individual line items for the work order. After a work order is released using Work Order Transaction Entry, you cannot delete a component item, but you can modify the step, scrap percentage, warehouse, quantity per parent, or extended quantity for the step in order to change its extended quantity to 0 (zero).

Work Order Entry also allows you to calculate the work order scheduled due date, work order scheduled release date, scheduled start date, and scheduled completion date of each step. Scheduling information is required to commit time in work centers and to update scheduled times in the Work Order files. Scheduling determines when each step should be started and how long each step will take so that dates for each step can be scheduled at each work center. Before you can exit a new work order, it must be scheduled. By scheduling the planned start date and the planned processing time for each step, you can easily track the progress of the work order.

Forward scheduling can be used to calculate the due date based on a specific release date and the lead times required. Backward scheduling can be used to calculate the necessary release date based on a specified due date. You can reschedule a work order even after it is released.

NOTE You cannot enter scheduling information for work order templates.

Routing Maintenance

Navigation

Select Work Order Main menu > Routing Maintenance.

Overview

Use Routing Maintenance to define the routing steps used to describe the manufacturing process. These steps describe the specific routing of a particular finished inventory item or generic routings used to manufacture similar products where the manufacturing process is the same, but the material and the finished products are different.

Work Order Traveler Printing

Navigation

Access this window using one of the following methods.

- Select Work Order Main menu > Work Order Traveler Printing.
- Select Work Order Main menu > Work Order Entry. In the Work Order Entry window, click the Print button.

Overview

Work Order Traveler Printing uses information entered in Work Order Entry to produce printed work order travelers to be attached to work orders as they travel through the shop. Bar codes can be printed for information such as the work order number, item/bill number, routing number, make for order, make for work order step, make for customer, quantity ordered, planned step number, work center, operation code, component item code, standard quantity, and standard hours.

Work Order Options allows you to include component material information on the travelers, and to print component material information first or mixed with step information. Travelers are printed according to the forms alignment and print specifications you define.

NOTE If the option to print work order travelers upon release is selected in the Work Order Options window, a work order traveler can be printed in Work Order Traveler Printing after it is released in Work Order Transaction Entry. If that option is not selected, you must manually select a group of work orders to print travelers for.

You can print graphical or nongraphical work order travelers based on your selection in Work Order Options.

Picking Sheet Printing

Navigation

Select Work Order Main menu > Picking Sheet Printing. In the W/O Picking Sheet Printing window, click List.

Overview

Use Picking Sheet Printing List to view the selected picking sheets.

Dispatch Sheet Printing

Navigation

Select Work Order Main menu > Dispatch Sheet Printing.

Overview

Use Dispatch Sheet Printing to print dispatch sheets listing all work scheduled to be performed in each work center for released and unreleased work orders. You can also print the status comment entered in Work Order Entry on dispatch sheets.

Operation Ticket Printing

Navigation

Select Work Order Main menu > Operation Ticket Printing.

Overview

Use Operation Ticket Printing to print operation tickets for each work center. An operation ticket lists the work order number, work center, and operation to be performed, and provides blank space for writing in the quantity completed, time started, time completed, and employee number. The basic purpose of the operation ticket is to provide instructions to the operator who will perform the operation at the work center.

You can print bar codes for selected information, such as the work order number, step number, work center, operation code, parent item number, scheduled quantity, scheduled hours, and planned operation cycles.

Operation tickets are not selected for printing automatically. You must select a group of work orders or individually select work orders and steps for each work center for which operation tickets can be printed.

You can print graphical or nongraphical operation tickets based on your selection in Work Order Options.

Work Order Transaction Entry

Navigation

Select Work Order Main menu > Work Order Transaction Entry. If the Allow Batch Entry check box is selected in the Work Order Options window, the W/O Batch Entry window appears; in the Batch Number field, enter a batch number, and then click OK.

Overview

Use Work Order Transaction Entry to enter all transactions against work orders. The types of transactions that can be entered include the following:

- Releasing a work order to production
- Issuing material
- Reporting labor
- Posting miscellaneous labor, material, and outside processing charges to a work order
- Completing a work order
- Closing a work order

Work Order Transaction Entry allows you to report work activities at alternate work centers, and record unplanned activities on a work order. Reporting activity against a work order relieves commitments of material and work center capacity reservations.

Each work order is assigned a transaction number and one of eight transaction types.

NOTE If you are performing Work Order Transaction Entry by batch, all new transactions entered are attached to the batch number that appears in the upper-right corner of the window.

Work Order Transaction Entry also allows you to report activities at an alternate work center, and record unplanned activities on a work order. Recording material and labor transactions against a work order relieves commitments of material and work center capacity reservations from future scheduling calculations.

A Work Order Transaction Journal for all transactions entered in Work Order Transaction Entry must be printed before updating to the permanent files is allowed. A separate journal is printed for each transaction type to facilitate an audit trail.

For each transaction, you can enter or view line information. Each transaction type requires different line item entry information.

Work Order Transaction Journal

Navigation

Access this window using one of the following methods.

- Select Work Order Main menu > Work Order Transaction Journal.
- Select Work Order Main menu > Work Order Transaction Entry. In the Work Order Transaction Entry window, click the Print button.

Overview

Use Work Order Transaction Journal to print the Work Order Transaction Journal registers, followed by a series of completion and close registers and reports if completion and close transactions have been entered. These registers itemize all entries made using Work Order Transaction Entry and provide an audit trail of the transactions recorded before updating to the permanent files.

NOTE The registers can be printed by transaction batch if batch entry is enabled in Work Order Options. During the batch print and update phases, other batches can be accessed for data entry and editing; however, only one user on the system at a time can print and update the Work Order Transaction Journal.

NOTE Save the most recently printed reports as an audit trail for work orders.

Review the registers for accuracy before updating. If there are errors, return to Work Order Transaction Entry, make the necessary changes, and reprint the registers.

NOTE Do NOT, under any circumstances, interrupt the update process.

During the update process, the following occurs:

- The quantity received, issued, on hand, on work order, and required for work order, and the warehouse average cost are updated to the Inventory Item Warehouse Detail file.
- The last cost, last activity date, and average cost are updated to the Inventory file.
- Inventory transactions are updated to the Inventory Transaction Detail file.
- The actual cost, overhead, last activity date, quantity completed, and quantity scrapped are updated to the Work Order file.
- The actual cost, overhead, last activity date, and actual time are updated to the Work Order Operation Detail file.
- The actual cost, overhead, last activity date, and quantity issued are updated to the Work Order Material Detail file.
- Work order transactions are updated to the Work Order Transaction Detail file.
- Costs entered and received are updated to the Work Order Work In Process Cost file.
- Postings are made to the General Ledger Daily Transaction file for later printing.

When the update is complete, a message appears prompting you to print the Auto Issue Material Shortage Report.

Work Order Transaction Journal allows you to print the following reports and journals.

- Release Register
- Labor Register
- Miscellaneous Labor Register

- Outside Processing Register
- Completion Summary Report
- Material Issues Register
- Labor Summary Report
- Miscellaneous Material Register
- Completion Register
- Close Register

Work Order Label Printing

Navigation

Select Work Order Main menu > Work Order Label Printing.

This task is available only if an option other than None is selected in the Print Work Order Labels field in the Work Order Options window.

To select work order labels for printing, Yes or By Item must be selected in the Receipt Labels field for at least one item in the Item Maintenance, and at least one completion transaction must be entered and updated during the Work Order Transaction Journal update.

Overview

Work Order Label Printing uses information entered in Work Order Transaction Entry to produce labels for manufactured items that can be printed onto pre-cut labels. Options exist for aligning the data to fit the size of your labels and the format of your label sheets.

The standard default format for labels is contained in the Forms file. This format can be modified or new formats can be created using the Forms Customization feature. Virtually any type of format can be created for printing item information on a wide variety of forms. You can, for example, print one type of label for packages or products and another type for labeling file folders or other internal records.

The item code, bin location, retail price, and standard price can be printed as bar codes on the work order labels. Bar codes must be predefined in Bar Code Printer Maintenance.

Each new format added to the file must be assigned a unique label form code that is stored with its own set of printing instructions. This code allows you to store information for multiple printing requirements without having to enter new data each time a format change is necessary. Create the format you need, and specify the data to be included.

To print labels for inventory items, use Inventory Label Printing.

You can print graphical or nongraphical work order labels based on your selection in Work Order Options.

Work Order Purge

Navigation

Select Work Order Main menu > Work Order Purge.

Overview

Use Work Order Purge to purge work order data based on the current accounting date and the number of days the system is set to retain closed work orders, as set in Work Order Options. The purged data is removed from the Open Work Order file and, if the work order history and transaction history are retained in Work Order Options, the data is transferred to the History files.

Cost Roll-Up Register

Navigation

Select Work Order Main menu > Cost Roll-Up Register. In the Work Order Cost Roll-Up Register window, click Print.

WARNING If the accounting date falls into a period closed in the General Ledger module, a warning displays and you will not be able to print or update.

Overview

The W/O Cost Roll-Up Register calculates the cost of each bill based on the cost of each component in its bill of materials with yield and scrap percentages included. The cost of all component bills assigned to the specific parent bill is recalculated, regardless of the number of levels involved. Labor and Overhead costs are calculated using the routing assigned to the bill. The standard cost for the parent item of a bill is updated with the calculated cost following the completion of the report.

The cost of each component item can be specified to use the average, last, or standard cost. In addition, scrap and yield percentages can be factored into the material cost. The labor and overhead amounts are calculated based on the information contained in the product routing specified for the bill.

You can select whether to update the cost of only the parent bills selected, or to update the cost of all component bills, regardless of the number of levels involved. Option bills are not included in the cost calculation. Only the current revision of base bills is updated.

If cost roll-up is performed on inventory items using the Standard Cost Valuation method, the appropriate general ledger adjustments are posted to the Inventory and Manufacturing Variance Adjustment accounts.

NOTE Save the most recently printed report as an audit trail.

Review the register for accuracy before updating.

WARNING Do NOT, under any circumstances, interrupt the update.

If there are errors, make the necessary changes in W/O Cost Roll-Up Register, and then reprint the register and proceed with the update. When the update is complete, the Work Order Cost Roll-Up file is cleared.

Inquiries Menu

Work Order Inquiry

Navigation

Select Work Order Inquiries menu > Work Order Inquiry.

Overview

Use Work Order Inquiry to review planned activities for a work order, as well as the current status of all operations and material issues. For operation steps, the inquiry provides the total number of hours scheduled and used. For material issues, quantities planned, issued, scrapped, and due are provided. You can search for a work order using the parent item description or one of the four user-defined fields set up in Work Order Options.

Work Order Inquiry allows you to view estimates, firm-planned, released, and closed work orders only. You cannot view work order templates. You can view the actual costs on the work order compared to the planned costs. You can also view work order memos.

The information provided by Work Order Inquiry can only be viewed. The System Security feature is used to restrict access to Work Order Entry and Work Order Transaction Entry to personnel authorized to add, delete, or maintain work order information. Other users, however, can be granted access to Work Order Inquiry for inquiry purposes only.

Work Order Inquiry displays summary information for the work order. If the work order entered is not released, the actual cost, variance, and variance percentage are not displayed. The inquiry also displays options codes if the Bill of Materials module is installed and option bills are used in Bill of Materials.

Work Order Inquiry details quantities ordered, planned, completed, transferred, and scrapped. Yield percentage, issue method, lead time, and scheduled and actual release dates are also included.

You can also view detailed information for a particular step, including any extended step description, and material component information for the selected work order. For each material component assigned to the work order, you can view the step number, revision, warehouse, unit of measure, quantity of parent items, and required and issued quantities.

If work order transaction details are retained, you can also view transaction information for the selected work order, including material issues, labor, outside processing costs, material substitutions, work order completions, and scrap transactions.

Work Center Capacity Inquiry

Navigation

Select Work Order Inquiries menu > Work Center Capacity Inquiry.

Overview

Use Work Center Capacity Inquiry to review capacity information (commitments against work centers) in three formats: daily, weekly, and detail. The daily and weekly formats provide a graphic representation of all commitments against the work center, including the scheduled and standard hours, on either a daily or weekly basis. The graphic display shows commitments within the capacity of the work center and also indicates overload conditions where they occur. The detail format lists all operations scheduled for the work center, as well as step numbers, operation descriptions, scheduled hours, and the status of the work orders.

NOTE The information displayed by this task can be printed in all three formats using the Scheduled Capacity Report.

Use the information provided in this task to analyze capacity and scheduling issues for work centers. The percentage of all planned commitments for the scheduled capacity of the work center is displayed for up to 20 percent of the work center capacity.

The information provided by Work Center Capacity Inquiry can only be viewed.

Component Where-Used Inquiry

Navigation

Select Work Order Inquiries menu > Component Where-Used Inquiry.

Overview

Use W/O Component Where-Used Inquiry to quickly review where components are being used in work orders. The inquiry can display inventory items, special items, and template special items.

After a work order is closed, all where-used information relating to a work order is removed from the file because transactions can no longer be entered against a closed work order.

The information provided by Component Where-Used Inquiry can only be viewed. The System Security feature can be used to restrict access to Work Order Entry and Work Order Transaction Entry to personnel authorized to add, delete, or maintain work order information. Other users, however, can be granted access to Component Where-Used Inquiry for inquiry purposes only.

Work Order History Inquiry

Navigation

Select Work Order Inquiries menu > Work Order History Inquiry.

This task is available only if the Retain Work Order History check box is selected in the Work Order Options window.

Overview

Use Work Order History Inquiry to view work order header, line item detail, and transaction detail information. This task provides a complete review of the history information for any closed work order. This task does not provide history information for work order templates. Information appears only for closed work orders that were purged. The information provided by Work Order History Inquiry can only be viewed.

You can use Work Order History Inquiry to view work order memos, and summary cost information for work orders.

You can view header information for a selected work order, including quantities ordered, planned, completed, transferred, and scrapped. Yield percentage, issue method, lead time, and scheduled and actual release dates are also included.

If work order line detail information is retained, you can view this information for a particular step, including any extended step description, the work center, operation code, description, planned hours, actual hours, and percentage complete.

If work order line detail information is retained, you can also view material component information for the selected work order, including the step number, revision, warehouse, unit of measure, quantity of parent items, and required and issued quantities.

If work order transaction detail is retained, you can view transaction information for the selected work order, including material issues, labor, outside processing costs, material substitutions, work order completions, and scrap transactions.

Reports Menu

Open Work Order Report

Navigation

Select Work Order Reports menu > Open Work Order Report.

Overview

The Open Work Order Report lists open work orders by work order number and work order type. This report can be printed to track the status of firm-planned, released, or closed work orders. The report can be produced in detail or summary form.

The header information in this report includes the work order date, status, corresponding sales order number, and customer, as well as the planned, completed, transferred, and scrapped quantities of the product. This report also shows comparative standard costs, actual costs, and cost variances. Component and operation detail is also available. The summary version of this report provides a single line per work order and includes the item code, work order due date, and status.

Work Order Memo Printing

Navigation

Select Work Order Reports menu > Work Order Memo Printing.

Overview

Use Work Order Memo Printing to print any memos containing information pertinent to specific work orders. These memos can contain recaps of work order correspondence or specific instructions regarding the handling of operations, material, and steps.

Each memo includes a header section containing information specific to the memo itself. This information includes a memo code, subject description, memo date, and reminder date. The work order number, date, and status are also included.

You can select the memos to be printed using the work order number, memo code, memo date, and reminder date. Other features include memo detail printing, page breaks between memos, and the printing of history memos only.

Material Shortage Report

Navigation

Select Work Order Reports menu > Material Shortage Report.

Overview

The Material Shortage Report recaps all material requirements for a specified range of components for which availability falls below zero. The material shortages of each component are provided by date.

The amount of information printed on the report is dictated by the number of transactions assigned to the selected work orders, and a specified cutoff date (steps with a date later than the cutoff date will not print on the report).

Scheduled Capacity Report

Navigation

Select Work Order Reports menu > Scheduled Capacity Report.

Overview

Use Scheduled Capacity Report to print capacity information (commitments against work centers) for a range of work centers in three formats: daily, weekly, and detail. The daily and weekly formats provide a graphic representation of all commitments against each work center, including the scheduled and standard hours for each day of the week or for each week. The detail format lists all operations scheduled for each work center in a specified range of dates.

The information provided by this report can be displayed in Work Center Capacity Inquiry.

Tooling Requirements Report

Navigation

Select Work Order Reports menu > Tooling Requirements Report.

Overview

The Tooling Requirements Report lists tool requirements by date for work orders with scheduled tool usage. This report allows you to review tooling requirements prior to performing the actual tooling. Tooling requirements are printed in tool number order up to the specified cutoff date. If tooling is entered on a step and the step has started, the scheduled hours printed represent only the tool usage time remaining. This report can be printed for scheduled tool hours and quantities.

Work in Process Report

Navigation

Select Work Order Reports menu > Work in Process Report.

Overview

The W/O Work in Process Report lists all costs to date for a range of released work orders. All work order activity and total information for labor, material, outside processes, and overhead are included.

This report can print with any combination of work order header, material, operation, and total information. You can also specify whether each work order will print on a separate page.

Work in Process Recap Report

Navigation

Select Work Order Reports menu > Work in Process Recap Report.

Overview

The W/O Work in Process Recap Report provides an overview of all work-in-process information for a range of work orders, work centers, and operation codes. This report provides a means of reconciling work in process in the General Ledger to the work in process on work orders. Direct, overhead, and total work-in-process costs are provided for each work order. Direct work in process is calculated by adding all material, labor, and outside processing amounts. Overhead work in process is calculated by adding all fixed and variable overhead for the work order.

The W/O Work in Process Recap Report can be printed in summary or detail form. The summary version provides work-in-process amounts for material, labor, and outside processing, as well as fixed and variable overhead information summarized by the sort option selected. The detail version provides the same work-in-process information detailed by work order, work center, and operation code.

On Demand Cost Ledger

Navigation

Select Work Order Reports menu > On Demand Cost Ledger.

NOTE This task is available only if the Retain Work Order Transaction Detail check box is selected in the Work Order Options window.

Overview

The On Demand Cost Ledger provides a cost ledger for a group of released or closed work orders. Work orders are selected individually by work order number. Any number of work orders can be entered per report.

The ledger prints a detailed listing of the transactions associated with each step. If more than one transaction is assigned to a step, a totals line prints for the step. The ledger also lists the transactions associated with each operation. The ledger is printed in work order number sequence. For outside process charges, the vendor name and description appear if the Accounts Payable module is installed.

The ledger can also be selected in Completion/Close Selection to print the report automatically for any work orders that have had close transactions entered using Work Order Transaction Entry. Completion/Close Selection can be accessed after the Work Order Transaction Journal is updated.

The On Demand Cost Ledger provides a complete history of the activities performed for each work order; therefore, the amount of time required to print this report depends on the number of transactions associated with each work order.

On Demand Missing Cost Report

Navigation

Select Work Order Reports menu > On Demand Missing Cost Report.

Overview

The On Demand Missing Cost Report lists all or a range of work orders, allowing you to verify if any material or operation costs are missing before completion or close transactions are entered against a work order. This report can be printed for released and/or closed work orders and helps you to identify work order steps where all or some of the costs may not have been recorded.

All work orders in the specified range are checked to determine if any material or operation costs are less than the planned costs by a percentage equal to or greater than the minimum variance percentage specified. The report includes steps with operational costs that are less than the standard costs by at least the specified percentage. The report also includes component items with material costs that are less than the standard costs by at least the specified percentage.

The On Demand Missing Cost Report can also be selected in Completion/Close Selection to print the report automatically for any work orders that have had completion or close transactions entered in Work Order Transaction Entry. Completion/Close Selection can be accessed after the Work Order Transaction Journal is updated.

On Demand Variance from Std Report

Navigation

Select Work Order Reports menu > On Demand Variance from Std Report.

Overview

The On Demand Variance from Standards Report lists all or a range of work orders that have variances from planned costs. You can print this report for released work orders and/or closed work orders.

All work orders in the specified range are checked to determine if material or operation costs vary from planned costs by a percentage equal to or greater than the minimum variance percentage specified. The report includes steps with an operational cost variance percentage greater than or equal to the specified percentage. The report also includes component items with a material cost variance percentage greater than or equal to the specified percentage. Positive as well as negative variances print.

The On Demand Variance from Standards Report can also be selected in Completion/Close Selection to print the report automatically for any work orders that have had completion or close transactions entered in Work Order Transaction Entry. Completion/Close Selection can be accessed after the Work Order Transaction Journal is updated.

Work Order History Report

Navigation

Select Work Order Reports menu > Work Order History Report.

NOTE This task is available only if the Retain Work Order History check box is selected in the Work Order Options window.

Overview

The Work Order History Report recaps all history information for work orders that have been closed and purged from the Open Work Order file. Each component item on the work order is detailed, including the quantities ordered, planned, and completed. The report can be produced in detail or summary form.

Setup Menu

Work Order Options

Navigation

Select Work Order Setup menu > Work Order Options.

Overview

Work Order Options presents a series of options allowing you to select features most appropriate to your business.

Work Order Options allows you to enter information detailing the operation of your Work Order module, enter user-defined fields, which can be used to categorize work orders, and integrate other modules with the Work Order module.

Work Order Options also allows you to set up the general ledger accounts used by the Work Order module. The default work in process and applied accounts entered in Work Order Options are used as the default accounts when a new operation code is defined in Operation Code Maintenance. These accounts can be changed for specific operation codes in Operation Code Maintenance.

You can also use Work Order Options to select forms that will print graphically with Crystal Reports.

Work Center Maintenance

Navigation

Select Work Order Setup menu > Work Center Maintenance.

Overview

Use Work Center Maintenance to define work centers and how they are scheduled. A work center is a specific production facility consisting of one or more persons or machines that are considered a single unit for capacity planning and detailed assignment of work.

NOTE You must set up at least one work center. You cannot delete work centers with assigned operation codes.

Operation Code Maintenance

Navigation

Select Work Order Setup menu > Operation Code Maintenance.

Overview

Operation Code Maintenance provides you with flexibility in determining how costs and overhead are calculated and what general ledger accounts are used to post production costs. Operation codes define the various processes that are performed to manufacture the final product or parent item. Operation codes are defined separately for each work center to identify the factory or shop location at which operations are performed.

NOTE You must set up at least one operation code.

Each of the work centers defined in Work Center Maintenance is capable of performing one or more operations. Use Operation Code Maintenance to define these operations for each work center, enter standard cost rates for the operations, assign general ledger accounts associated with each operation to post production costs, and define overhead calculation rates. Maintaining this information for each operation code provides you with complete flexibility.

If labor is charged at the employee rate for a work center, the planned cost rate per hour is used only to calculate the planned cost. Actual cost is calculated using the rate entered in Production Employee Maintenance. The planned cost is normally used only for labor or machine operations. You do not need to enter a planned cost for outside process steps because the standard rate(s) can vary from work order to work order based on individual bids. Overhead can be applied to labor, material, and/or outside processing costs. By applying overhead based on hours, overhead is applied on labor only. By applying overhead based on cost, overhead is applied to labor costs plus any material and outside processing costs applied to this line.

Production Employee Maintenance

Navigation

Select Work Order Setup menu > Production Employee Maintenance.

Overview

Use Production Employee Maintenance to define employee numbers to use for posting labor against a work order. For each production employee, you can enter the employee's name, employee number, standard labor rate, and Social Security number.

Labor Crew Maintenance

Navigation

Select Work Order Setup menu > Labor Crew Maintenance.

Overview

Use Labor Crew Maintenance to group production employees defined in Production Employee Maintenance into labor crews. Using these predefined labor crews saves time when labor transactions are entered against work orders. An existing labor crew can be maintained at any time. Production employees can be added and removed from the crew, as required.

NOTE You must enter at least one employee in a crew.

If labor is charged at the employee rate, all the employees' rates are added together to calculate the rate per hour for the labor crew.

Shop Calendar Maintenance

Navigation

Select Work Order Setup menu > Shop Calendar Maintenance.

Overview

Use Shop Calendar Maintenance to maintain a shop calendar for an entire shop and/or for individual work centers. Shop calendar entries are used for scheduling in Work Order Entry to indicate when a shop as a whole, or individual work centers in a shop, will be open or closed. All shop calendar entries are automatically sorted by date.

Tooling Maintenance

Navigation

Select Work Order Setup menu > Tooling Maintenance.

Overview

Use Tooling Maintenance to define tools that are used during steps on work orders. An identification number and corresponding description is defined for every tool that is used in the production operation. Tool numbers can be assigned to work order steps. When the step is scheduled, the tool is also scheduled.

You can also print a Tooling Listing.

Bar Code Printer Maintenance

Navigation

Select Work Order Setup menu > Bar Code Printer Maintenance.

Overview

Use Bar Code Printer Maintenance to select one of two types of bar code standards to use for printing bar code information on labels and forms. This option allows you to select the printer for printing bar codes.

NOTE Bar Code Printer Maintenance must be set up before any bar codes can be printed.

NOTE If printing nongraphical bar code forms, you must set up a DOS printer in Device Configurator to use as a bar code printer, and then select that printer when printing bar codes to avoid Windows printing conflicts.