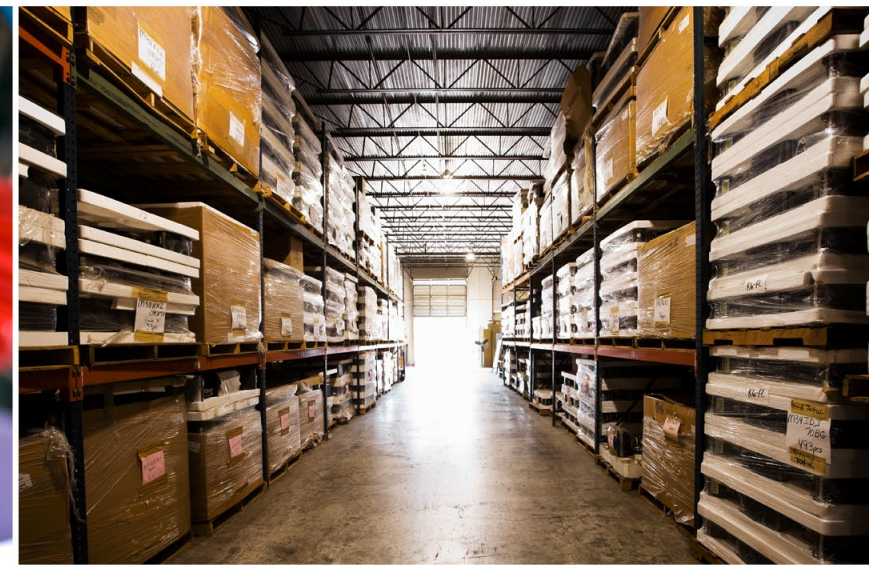
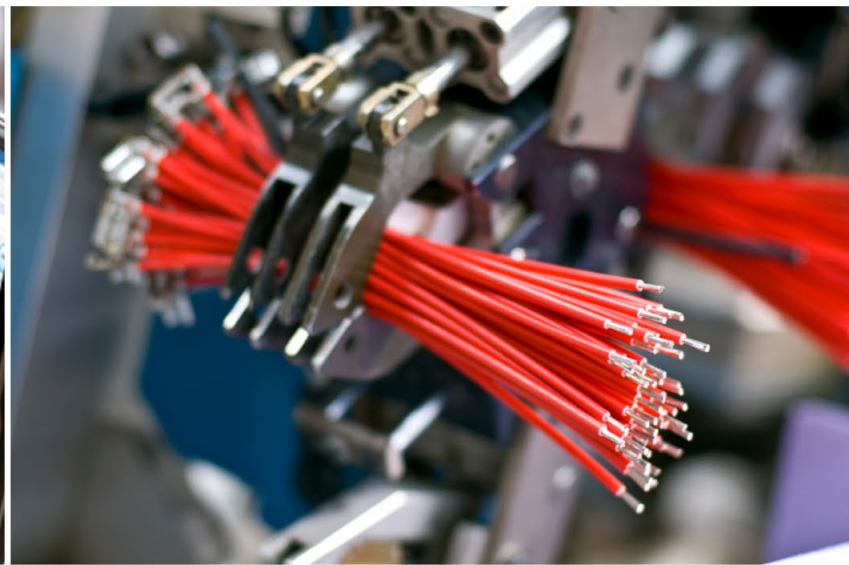
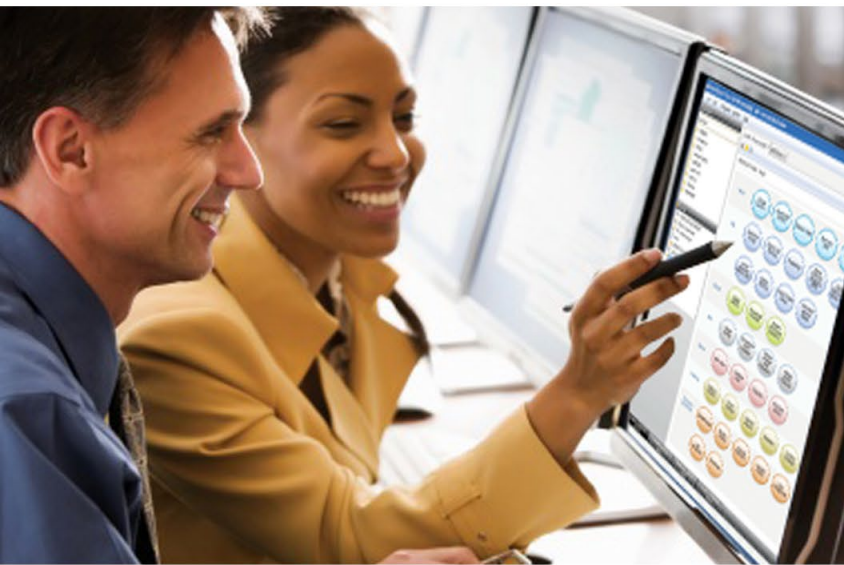


Production Order Maintenance Essentials

Production Order Training
2017



Lesson Overview

- Introduction
- Production Order Maintenance Flow
- Key Takeaways

Objectives

- Maintain work orders and repetitive schedule orders, understanding fundamental features for:
 - Mfg Type, Order Type and purchase/manufacture code
 - Production line, and setup for item, site, routing, and BOM/Formula code
 - Order status
 - Release, due, and need dates
 - Production order quantities and yield

Prerequisites

- Basic understanding of work orders and or repetitive scheduled order.

Primary Audience

- Business analysts
- Implementation managers
- Production schedulers
- Production managers
- Materials managers

Introduction

Production Order Maintenance

- Production Order Maintenance (16.3.1)
 - Provides a single function for both work orders and repetitive scheduled production orders.
 - Provides direct access to fields directly related to the production order, but not including its routing or components.
 - Processing and default values are determined by item and production lines setup.
- Master Schedule Order Maintenance (22.13)
 - Provides same functions as Production Order Maintenance.

Alternatives

- Production Orders Collection
- Production Scheduling Workbench (16.2.1)
- Master Scheduling Workbench (22.20.1)

Production Orders Collection

- Simplifies search, navigation, and order selection.
- Provides access to:
 - Production Order Maintenance
 - Production order routing, production order components
 - Functions for processing transactions for production orders

The screenshot displays the QAD Production Orders Collection interface. It features a search bar at the top with a dropdown menu set to 'Order' and a 'starts at' dropdown. Below the search bar, a table lists production orders with columns: Order, ID, Site, Line, Item Number, Description, Due Date, Release Date, Order Date, and Need Date. The table shows four records, with the first record highlighted. Below the first table, there are tabs for 'Production Order Bill Browse', 'Production Order Routing Browse', 'Production Order Component Issue', and 'Prod Order Receipt Backflush'. The 'Production Order Component Issue' tab is active, showing a table with columns: Component Item, Component Description, Operation, Operation Description, Issue Date, Quantity Open, and Qty Per Unit. This table shows three records, with the first record highlighted.

Order	ID	Site	Line	Item Number	Description	Due Date	Release Date	Order Date	Need Date
0111003	2283378	10-200	1020	52201	Motor Mtg Plate 8 Way	1/17/2011	1/16/2011	8/2/2010	1/17/2011
0111005	2283380	10-300		70002	Disinfectant, Scented	1/17/2011	1/16/2011	8/2/2010	1/17/2011
01160002	2349129	10-100		60092	Microprocessor	3/5/2015	2/27/2015	3/5/2015	3/5/2015
02100002	2329270	10-202		62050	Beryllium Copper	3/5/2015	3/2/2015	3/5/2015	3/5/2015

Component Item	Component Description	Operation	Operation Description	Issue Date	Quantity Open	Qty Per Unit
62250	Steel CRS 18ga 4301	10		1/16/2011	0.0	
62290	Tool Forming Die	10		1/16/2011	0.0	
62291	Tool Forming Die Life	10		1/16/2011	0.0	0.0000

Scheduling Workbenches

- Production Scheduling Workbench (PSW) and Master Scheduling Workbench (MSW)
- Provide broader context, not limited to:
 - Demand and supply for an item
 - Resource capacity and load
 - Component availability and status
- Filtered access to individual production orders
- Production orders updated upon 'Save'

Production Order Maintenance Flow

Production Order Fundamentals

Identified by 'Production Order' and 'ID'

A production order is an order for:

1. Item for production at a site
2. Work order or repetitive schedule that is determined by 'Order Type' and 'Mfg Type'
3. Production line
4. Order status
5. Routing code and BOM/formula code that determine how it will be produced
6. Release, due date, and need date
7. Quantity to start and expected quantity to complete

The screenshot shows the 'Production Order Maintenance' window in QAD. It contains various fields for defining a production order. Numbered callouts (1-7) from the text box on the left point to the following fields:

- 1. Production Order: 1013
- 2. Order Type: (blank)
- 3. Production Line: 1000
- 4. Order Status: F
- 5. Routing Code: (blank)
- 6. Release Date: 2/27/2017
- 7. Quantity to Start: 120.0

Other visible fields include:

- ID: 2438348
- Item Number: 02220
- Motor Asm 4-Way Seat Adj
- Site: 10-200
- Assembly
- Order Date: 2/27/2017
- Need Date: 3/1/2017
- Mfg Type: WO
- Production Seq: 0.0
- Shift: (blank)
- BOM/Formula Code: (blank)
- Sales/Job: (blank)
- Supplier: (blank)
- Split Order Cum ID: (blank)
- Quantity to Complete: 120.0
- Estimated Yield Percent: 100.00%
- Estimated Qty To Scrap: 0.0
- Actual Qty Completed: 0.0
- Actual Qty Scrapped: 0.0
- Order Sheet Printed: ☐
- Remarks: (blank)
- Comments: ☐

Production Order and ID

- Accept the default values by pressing Next or manually enter values to override system assigned values.

The screenshot shows the 'Production Order Maintenance' window in QAD software. The window has a title bar with tabs for 'Processes', 'Production Order Maintenance', and 'Item Planning Maintenance'. Below the title bar is a menu bar with options: 'Go To', 'Actions', 'Copy', 'Print', 'Preview', and 'Attach'. The main area contains a form with various fields for entering production order details. A blue rectangular box highlights the 'Production Order' and 'ID' fields at the top. The fields are arranged in two columns. The left column includes: Item Number, Site, Order Type, Production Line, Release Date, Due Date, Order Status, Quantity to Complete, Quantity to Start, Estimated Yield Percent, Estimated Qty To Scrap, Actual Qty Completed, Actual Qty Scrapped, Order Sheet Printed (checkbox), Remarks, and Comments (checkbox). The right column includes: Order Date, Need Date, Mfg Type, Production Seq, Shift, Routing Code, BOM/Formula Code, Sales/Job, Supplier, and Split Order Cum ID.

Field	Field
Production Order:	ID:
Item Number:	
Site:	
Order Type:	
Production Line:	
Release Date:	Order Date:
Due Date:	Need Date:
Order Status:	Mfg Type:
Quantity to Complete:	
Quantity to Start:	Production Seq:
Estimated Yield Percent:	Shift:
Estimated Qty To Scrap:	Routing Code:
Actual Qty Completed:	BOM/Formula Code:
Actual Qty Scrapped:	Sales/Job:
Order Sheet Printed: ☐	Supplier:
Remarks:	
Comments: ☐	Split Order Cum ID:

Production Order and ID

- Use the lookup or enter item and site.

Processes x Production Order Maintenance x Item Planning Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348

Item Number: 02220 Motor Asm 4-Way Seat Adj

Site: 10-200

Order Type:

Production Line:

Release Date:

Due Date:

Order Status:

Quantity to Complete:

Quantity to Start:

Estimated Yield Percent:

Estimated Qty To Scrap:

Actual Qty Completed:

Actual Qty Scrapped:

Order Sheet Printed: ☐

Remarks:

Comments: ☐

Order Date:

Need Date:

Mfg Type:

Production Seq:

Shift:

Routing Code:

BOM/Formula Code:

Sales/Job:

Supplier:

Split Order Cum ID:

Order Type and Mfg Type

Assignment of Order Type

- Default values assigned to Order Type and Mfg Type determined by Purchase/Manufacture code.

Processes x Production Order Maintenance x Item Planning Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line:
Release Date: Order Date:
Due Date: Need Date:
Order Status: Mfg Type:
Quantity to Complete:
Quantity to Start: Production Seq:
Estimated Yield Percent: Shift:
Estimated Qty To Scrap: Routing Code:
Actual Qty Completed: BOM/Formula Code:
Actual Qty Scrapped: Sales/Job:
Order Sheet Printed: ☐ Supplier:
Remarks:
Comments: ☐ Split Order Cum ID:

Processes x Production Order Maintenance x Item Planning Maintenance x

Go To Actions Copy Print Preview Attach

Item Number: 02220 Description: Motor Asm 4-Way Seat Adj
Unit of Measure: EA 24V 3 amp 1.hp
Phantom: ☒
Item Planning Data
Mstr Sched: ☒ Buyer/Planner:
Plan Orders: ☒ Supplier:
Time Fence: 0 PO Site:
MRP Required: ☒ Purchase/Manufacture: M
Minimum Order: 0
Maximum Order: 0
Order Multiple: 0

Mfg Type and Order Type

Processes X Production Order Maintenance X Item Planning Maintenance X

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200

Order Type:

Production Line:

Release Date:

Due Date:

Order Status:

Quantity to Complete: 0.0
Quantity to Start: 0.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Assembly

Order Date:

Need Date:

Mfg Type:

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Order Type values are blank for normal orders, scheduled (S), and cumulative (C)

Mfg Type values are work order (WO) and repetitive (Rep)

Purchase/Manufacture 'L' and Types

- Purchase/Manufacture 'L' default
 - Order Type default Scheduled (S)
 - Mfg Type default Repetitive (Rep)

Item Number: 02200		Description: Motor Asm 8 Way Seat Adj	
Unit of Measure: EA		24V amp 2 hp	
Item Planning Data			
Mstr Sched: ☒	Buyer/Planner:	Phantom: ☐	
Plan Orders: ☒	Supplier:	Minimum Order: 0	
Time Fence: 0	PO Site: 10-200	Maximum Order: 0	
MRP Required: ☒	Purchase/Manufacture: L	Order Multiple: 0	

Change Order Type from 'S' to blank

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1007 ID: 2438341
Item Number: 02200 Motor Asm 8 Way Seat Adj
Site: 10-200

Order Type: S

Production Line: 1000 Assembly

Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 2/27/2017 Need Date: 2/27/2017

Order Status: F Mfg Type: Rep

Quantity to Complete: 150.0
Quantity to Start: 150.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1007 ID: 2438341
Item Number: 02200 Motor Asm 8 Way Seat Adj
Site: 10-200

Order Type:

Production Line: 1000 Assembly

Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 2/27/2017 Need Date: 2/27/2017

Order Status: F Mfg Type: WO

Quantity to Complete: 150.000000000
Quantity to Start: 150.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Change the Order Type to blank to convert a repetitive production order to a work order.

Change Order Type from blank to 'S'

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1009 ID: 2438343
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200 Automotive Mfg

Order Type:

Production Line: 1000 Assembly

Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 2/27/2017 Need Date: 2/27/2017

Order Status: F Mfg Type: WO

Quantity to Complete: 75.0
Quantity to Start: 94.0
Estimated Yield Percent: 80.00%
Estimated Qty To Scrap: 19.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1009 ID: 2438343
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200 Automotive Mfg

Order Type: S

Production Line: 1000 Assembly

Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 2/27/2017 Need Date: 2/27/2017

Order Status: F Mfg Type: Rep

Quantity to Complete: 75.000000000
Quantity to Start: 94.0
Estimated Yield Percent: 80.00%
Estimated Qty To Scrap: 19.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Change the Order Type to 'S' to convert a work order to a repetitive production order.

Purchase/Manufacture not 'L'

- Purchase/Manufacture not 'L' default
 - Order Type default blank ()
 - Mfg Type default Work Order (WO)

Item Number: 02220		Description: Motor Asm 4-Way Seat Adj	
Unit of Measure: EA		24V 3 amp 1.hp	
Item Planning Data			
Mstr Sched: ☒	Buyer/Planner:	Phantom: ☐	
Plan Orders: ☒	Supplier:	Minimum Order:	0
Time Fence:	PO Site:	Maximum Order:	0
MRP Required: ☒	Purchase/Manufacture: M	Order Multiple:	0

Production Line and Production Orders

Required when
Mfg Type = Repetitive

Set up for the item with
Item Production Line
Maintenance (16.1.13)

Processes x Production Order Maintenance x Item Planning Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000 Assembly
Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 3/1/2017 Need Date: 3/1/2017
Order Status: F Mfg Type: WO
Quantity to Complete: 0.0
Quantity to Start: 0.0 Production Seq: 0.0
Estimated Yield Percent: 100.00% Shift:
Estimated Qty To Scrap: 0.0 Routing Code:
Actual Qty Completed: 0.0 BOM/Formula Code:
Actual Qty Scrapped: 0.0 Sales/Job:
Order Sheet Printed: ☐ Supplier:
Remarks:
Comments: ☐ Split Order Cum ID:

Production Line, Routing, and BOM/Formula

Accept or Override Production Line

Production Order Maintenance | Item Production Line Browse | Product Structure Maintenance | Product Structure by NI

Actions | Setup | Cancel | Add to Favorites

Search (Item Number matches "022")

Item Number | contains | 022 | Search

Viewing 1 - 5 of 5 | Records per page: 100

Item Number	Item Description	Site	Production Line	Units/Hour	Setup Time	Schedule
02200	Motor Asm 8 Way Seat Adj	10-200	1000	100.00	00:00:00	Alex
02200	Motor Asm 8 Way Seat Adj	10-200	1020	20.00	00:00:00	G1
02200	Motor Asm 8 Way Seat Adj	10-200	1050	30.00	00:00:00	G1
02210	Motor Asm 6-Way Seat Adj	10-200	1000	64.00	00:00:00	Alex
02220	Motor Asm 4-Way Seat Adj	10-200	1000	100.00	00:00:00	Alex

Item 02220 is made on
Production Line 1000 at Site 10-200.

If *Auto Add Item To Production Line* = **Yes** and you add that item to production line that it is not made on, the system will prompt you if you want to add the item to the production line.

Production Order: 1021 | ID: 2438457

Item Number: 02220 | Motor Asm 4-Way Seat Adj

Site: 10-200

Order Type: Assembly

Production Line: 1020

Release Date: 3/30/2017 | Order Date: 3/30/2017

Due Date: 3/30/2017 | Need Date: 3/30/2017

Order Status: F | Mfg Type: WO

Quantity to Complete: 0.0

Quantity to Start: 0.0

Estimated Yield Percent: 100.00%

Estimated Qty To Scrap: 0.0

Actual Qty Completed: 0.0

Actual Qty Scrapped: 0.0

Order Sheet Printed: ☐

Remarks:

Comments:

Sales/Job:

Supplier:

Split Order Cum ID:

Do you want to add the item to this production line?

Yes No

Back Next

Item not defined on this production line

Accept or Override Production Line

Processes x Production Order Maintenance x Item Planning Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000 Assembly
Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 3/1/2017 Need Date: 3/1/2017
Order Status: F Mfg Type: WO
Quantity to Complete: 0.0
Quantity to Start: 0.0 Production Seq: 0.0
Estimated Yield Percent: 100.00% Shift:
Estimated Qty To Scrap: 0.0 Routing Code:
Actual Qty Completed: 0.0 BOM/Formula Code:
Actual Qty Scrapped: 0.0 Sales/Job:
Order Sheet Printed: Supplier:
Remarks:
Comments: Split Order Cum ID:

Processes x Production Order Maintenance x Production Order Control x

Go To Actions Copy Print Preview

Production Order Data
Next Order Number: 1015
Next Picklist: 10002
P/L Prefix: RP
Production Order Comments:
Routing Comments:
Move First Operation:
Include Yield:
Quantity Complete Method: SUM SUMMARIZE
Open Qty Method: QtyProc Quantity Processed
Reason Code Criticality: W
Auto Add Item To Production Line:
Auto Add Alternate BOM/Routing:
Zero Balance Work in Process:

You can enter a different production line when *Auto Add Item To Production Line* = Yes in Production Order Control (16.24).

Accept or Override Production Line

Production Order Maintenance x Item Production Line Browse x Product Structure Maintenance x Product Structure b

Actions Setup Cancel Add to Favorites

Search (Item Number matches "022")

Item Number contains 022 Search

Viewing 1 - 5 of 5 Records per page: 100

Item Number	Item Description	Site	Production Line	Units/Hour	Setup Time	Schedu
02200	Motor Asm 8 Way Seat Adj	10-200	1000	100.00	00:00:00	Alex
02200	Motor Asm 8 Way Seat Adj	10-200	1020	20.00	00:00:00	G1
02200	Motor Asm 8 Way Seat Adj	10-200	1050	30.00	00:00:00	G1
02210	Motor Asm 6-Way Seat Adj	10-200	1000	64.00	00:00:00	Alex
02220	Motor Asm 4-Way Seat Adj	10-200	1000	100.00	00:00:00	Alex

Item 02220 is made on
Production Line 1000 at Site 10-200.

If *Auto Add Item To Production Line* = **No**
and you add that item to production line
that it is not made on, the system will show
the following error.

Production Order Maintenance x Item Production Line Browse x Product Structure Maintenance x Product S

Go To Actions Copy Print Preview Attach

Production Order: 1021 ID: 2438457

Item Number: 02220 Motor Asm 4-Way Seat Adj

Site: 10-200

Order Type:

Production Line: 1020 Assembly

Release Date: 3/30/2017 Order Date: 3/30/2017

Due Date: 3/30/2017 Need Date: 3/30/2017

Order Status: F Mfg Type: WO

Quantity to C

Quantity

Estimated Yield

Estimated Qty T

Actual Qty Co

Actual Qty S

Order Shee

Remarks:

Comments: ☐

Split Order Cum ID:

Error

ERROR: Item not defined on this production line. Please re-enter.

OK

Production Line, Routing, and BOM Codes

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348

Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200

Order Type:
Production Line: 1000 Assembly

Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 3/1/2017 Need Date: 3/1/2017
Order Status: F Mfg Type: WO

Quantity to Complete: 120.0
Quantity to Start: 120.0
Estimated Yield Percent: 100.00%

Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0

Order Sheet Printed: ☐

Remarks:

Comments: ☐

Production Seq: 0.0
Shift:

Routing Code:
BOM/Formula Code:

Sales/Job:
Supplier:

Split Order Cum ID:

Routing Code and BOM/Formula Code default for the Item, Production Line and Site.

Production Order Status

Production Order Status

- Order status works with Production Activity Threshold parameter in Production Order Control (16.24)

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1006 ID: 2438340
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200 Automotive Mfg
Order Type:
Production Line: 1000
Release Date: 3/10/2017 Order Date: 2/27/2017
Due Date: 3/15/2017 Need Date: 2/27/2017
Order Status: Mfg Type: WO
Quantity to Complete: 200.0
Quantity to Start: 200.0 Production Seq: 0.0

Processes x Production Order Maintenance x Production Order Control x

Go To Actions Copy Print Preview

Production Order Data
Production Activity Threshold: A Allocated

Repetitive Order Data
Transfer Work in Process: ☒
WIP Transfer Acct: 1600 Mech
End Eff Default Method: 3
End Effective Days: 20
Completion Consumption Method: Window Use consumption window
Consume Forward: 10
Consume Back: 10
Start of Week: Mon
Begin Consumption: EffDate
Production Activity Threshold: F Firm Planned

Planned (P), Firm Planned (F), Exploded (E), Allocated (A), Released (R), Closed (C)

Production Order Dates

Production Order Dates

Processes X Production Order Maintenance X Item Planning Maintenance X

Go To Actions Copy Print Preview Attach

Production Order: 1013
Item Number: 02220
Site: 10-200
Order Type:
Production Line: 1000

Release Date: 2/27/2017
Due Date: 3/1/2017

Order Status: F

Quantity to Complete: 0.0
Quantity to Start: 0.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

ID: 2438348
Motor Asm 4-Way Seat Adj

Assembly

Order Date: 2/27/2017
Need Date: 3/1/2017

Mfg Type: WD

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Due date calculated from release date using item manufacturing lead time or routing code and quantity

MRP determines need date when it creates or reschedules a planned order (status 'P')

Schedule Due Date

Enter Release Date and
provide a value of ? for
Due Date

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000 
Release Date: 3/10/2017 
Due Date: 
Order Status: F

Assembly
Order Date: 2/27/2017 
Need Date: 3/1/2017 
Mfg Type: WO

Quantity to Complete: 120.0
Quantity to Start: 120.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Schedule Release Date

Enter Due Date and
provide a value of ? for
Release Date

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000
Release Date:
Due Date: 3/17/2017
Order Status: F

Assembly
Order Date: 2/27/2017
Need Date: 3/1/2017
Mfg Type: WO

Quantity to Complete: 120.0
Quantity to Start: 120.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Production Order Quantities

Quantity to Complete

Enter quantity to complete.

Estimated yield from item planning data

Processes x Production Order Maintenance x Item Planning Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000 Assembly
Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 3/1/2017 Need Date: 3/1/2017
Order Status: F Mfg Type: WD

Quantity to Complete: 0.000000000
Quantity to Start: 0.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐
Split Order Cum ID:

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:

Quantity to Complete with Yield

Enter quantity to complete and yield to calculate quantity to start.

Processes x Production Order Maintenance x Item Planning Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000 Assembly
Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 3/1/2017 Need Date: 3/1/2017
Order Status: F Mfg Type: WO

Quantity to Complete: 0.000000000
Quantity to Start: 0.0
Estimated Yield Percent: 100.00%

Estimated Qty To Scrap: 0.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Quantity to Complete and Start

Enter quantity to complete and quantity to start. The system then calculates yield.

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000 Assembly
Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 3/1/2017 Need Date: 3/1/2017
Order Status: F Mfg Type: WO

Quantity to Complete:	120.0
Quantity to Start:	140000000000

Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 20.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:
Split Order Cum ID:

Quantity to Start with Yield

Enter quantity to start and yield to calculate quantity to complete.

Processes x Production Order Maintenance x

Go To Actions Copy Print Preview Attach

Production Order: 1013 ID: 2438348
Item Number: 02220 Motor Asm 4-Way Seat Adj
Site: 10-200
Order Type:
Production Line: 1000 Assembly
Release Date: 2/27/2017 Order Date: 2/27/2017
Due Date: 3/1/2017 Need Date: 3/1/2017
Order Status: F Mfg Type: WO

Quantity to Complete: 0.0
Quantity to Start: 120.0
Estimated Yield Percent: 100.00%
Estimated Qty To Scrap: 20.0
Actual Qty Completed: 0.0
Actual Qty Scrapped: 0.0
Order Sheet Printed: ☐
Remarks:
Comments: ☐
Split Order Cum ID:

Production Seq: 0.0
Shift:
Routing Code:
BOM/Formula Code:
Sales/Job:
Supplier:

Key Takeaways

Summary

- Maintain work orders and repetitive schedule orders, understanding fundamental features for:
 - Mfg Type, Order Type and purchase/manufacture code
 - Production line, and setup for item, site, routing, and BOM/Formula code
 - Order status
 - Release, due, and need dates
 - Production order quantities and yield

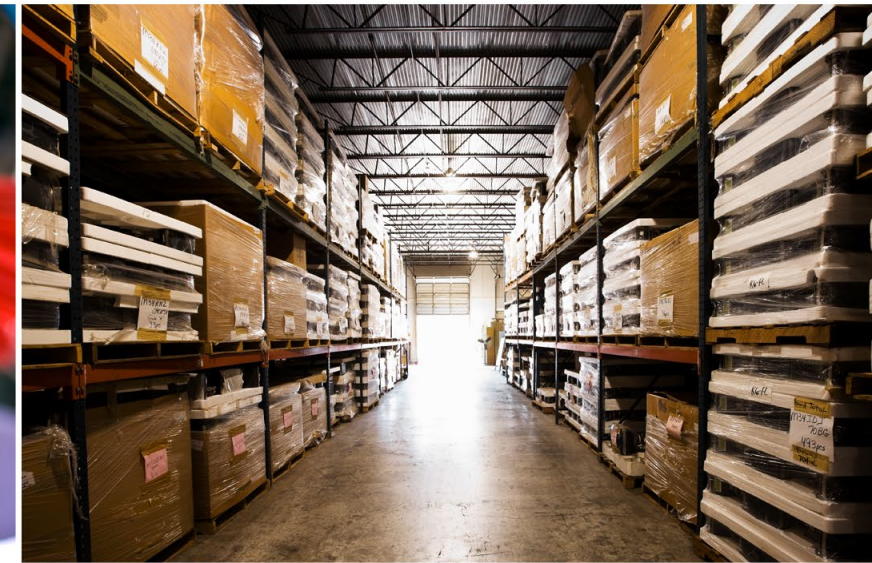
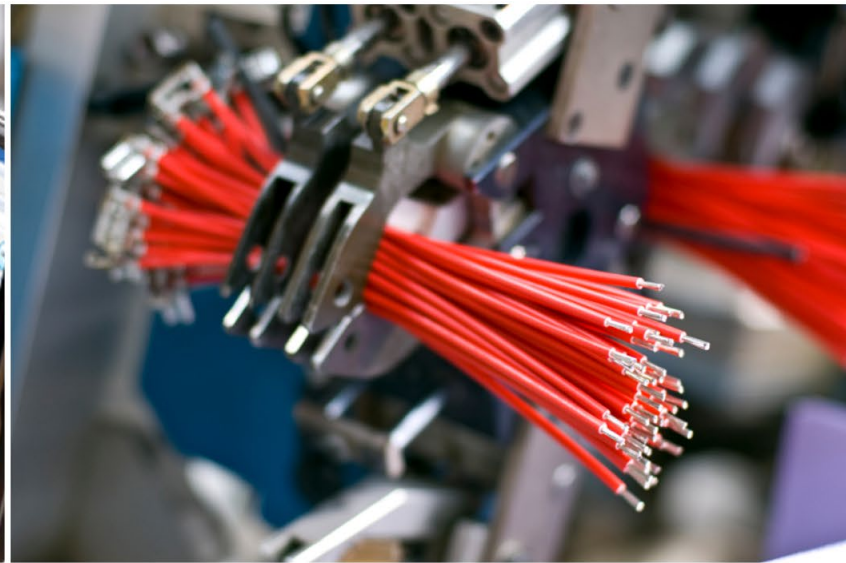
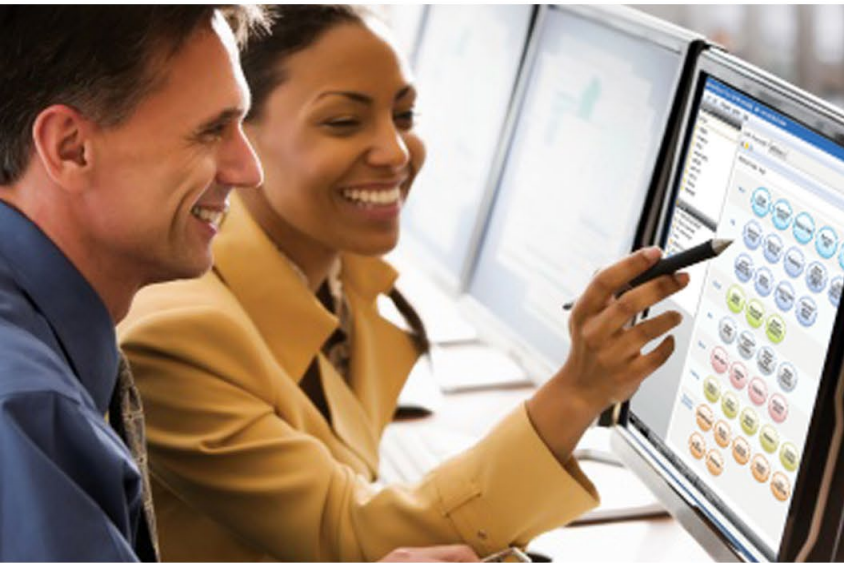
Questions?

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Monitor Materials for Production

Production Order Training
2017



Lesson Overview

- Production Scheduling Workbench tools
- Additional tools
- Key Takeaways

Objectives

- Monitor and analyze material shortages and component availability using:
 - Production Scheduling Workbench tools
 - Schedules with production order component status
 - Panels with production order components, component supply/demand and PQOH
 - Shortage Report
 - Additional tools
 - Production Picklist Browse
 - Monitor Material Shortages

Prerequisites

- Basic understanding of:
 - Work orders and or repetitive scheduled orders.
 - Production picklists and shortage tags.
 - QAD Planning and Scheduling Workbenches

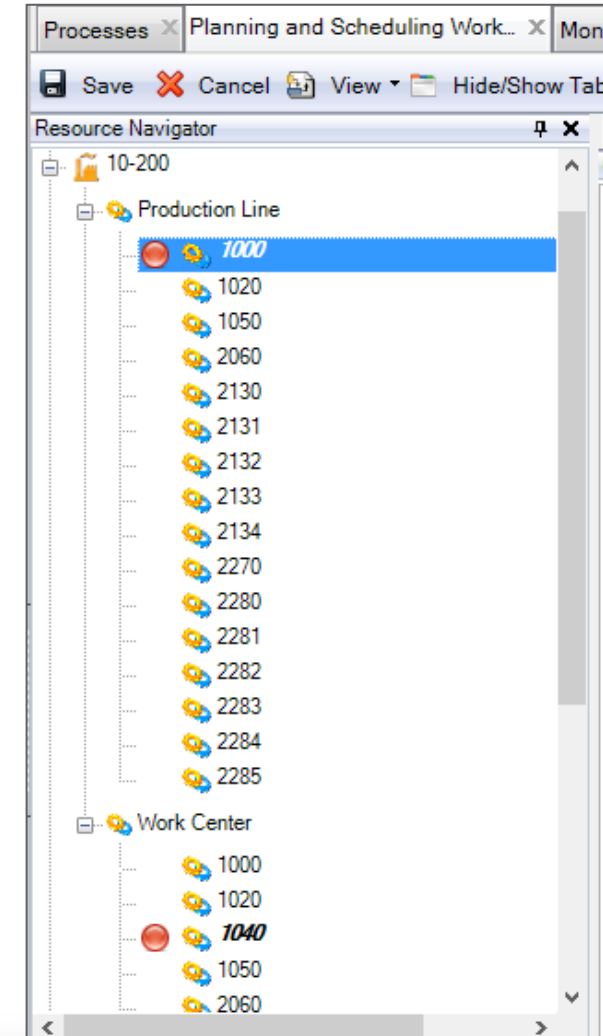
Primary Audience

- Business analysts
- Implementation managers
- Production schedulers
- Operations managers
- Production managers
- Materials managers

Production Scheduling Workbench Tools

Planning and Scheduling Workbenches

- Use the Resource Navigator to select:
 - Production Line and Site
 - Work Center and Site



Production Order Material Status

- Component status represents the overall material status for all components for a production order.

Production orders scheduled for the site and resource

Overall status of components for a production order

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item Nu	Setup Time (Hrs)	Required Capacity	Status	Component Status	Qty To Star	Open Quantit	Release	Due	Resource
2438		0				02220	0	4.8	R	Shortage	480	480	03/23/2017	03/23/2017	1000
2438		1				52220	0	5.4	F	Projected Shortage	540	540	03/23/2017	03/23/2017	1000
2438		2				02200	0	2.5	A	Shortage	245	245	03/23/2017	03/23/2017	1000
2438		3				52221	0	4.9	F	Projected Shortage	490	490	03/23/2017	03/27/2017	1000
2438		4				02220	0	2	F	Projected Shortage	200	200	03/23/2017	03/27/2017	1000
2438		5				52220	0	4	F	Projected Shortage	400	400	03/23/2017	03/23/2017	1000

ID	Item Number	Status	Qty To Start	Release	Due	Component Status	Production Order
2438451	02220	F	15	03/15/2017	03/20/2017	Projected Shortage	1018
2438439	02220	F	200	03/23/2017	03/27/2017	Projected Shortage	03150003
2438436	02220	P	120	03/13/2017	03/15/2017	Projected Shortage	03090009
2438445	02220	P	600	03/30/2017	04/03/2017	Projected Shortage	03150005
2438446	02220	P	200	04/06/2017	04/10/2017	Projected Shortage	03150006
2438351	02220	R	480	03/23/2017	03/23/2017	Shortage	02280002

Production Order Material Status

- Component status represents the overall material status for all components for a production order

Processes: Planning and Scheduling Work... Production Orders Progress Editor Item Production Line Maintenance...

Save Cancel View Hide/Show Tab Find

Resource Navigator Master Scheduling Production Scheduling Shortage Report Product Structure Projected On Hand

Production Scheduling

0322 Required: 0 Hours (0) Remaining: 8 Hours (800) Carry Over: 42.51 Hours (4251)
 0323 Required: 23.55 Hours (2355) Remaining: -15.55 Hours (-1555) Carry Over: 34.51 Hours (3451)

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item No	Setup Time (Hrs)	Required Capacity	Status	Component Status	Qty To Start	Open Quant	Release	Due	Resource
2438	0					02220	0	4.8	F	Projected Shortage	480	480	03/23/2017	03/23/2017	1000
2438	1					02220	0	5.4	F	Projected Shortage	540	540	03/23/2017	03/23/2017	1000
2438	2					02200	0	2.5	A	Shortage	245	245	03/23/2017	03/23/2017	1000
2438	3					02221	0	4.9	F	Projected Shortage	490	490	03/23/2017	03/27/2017	1000
2438	4					02220	0	2	F	Projected Shortage	200	200	03/23/2017	03/27/2017	1000
2438	5					02220	0	4	F	Projected Shortage	400	400	03/23/2017	03/23/2017	1000

0324 Required: 0 Hours (0) Remaining: 8 Hours (800) Carry Over: 50.06 Hours (5006)

Production Order Maintenance Demand Details Supply Details Inventory Details Calendar Exception EAM Repair Orders Action Messages Item Master Item Planning Sales Quantity by Month Seasonal Build InterSite Demand Holidays

Production Order Maintenance

New Delete Validate

Drag a column header here to group by that column

ID	Item Number	Status	Qty To Start	Release	Due	Component Status	Production Order
2438451	02220	F	15	03/15/2017	03/20/2017	Projected Shortage	1018
2438439	02220	F	200	03/23/2017	03/27/2017	Projected Shortage	03150003
2438436	02220	P	120	03/13/2017	03/15/2017	Projected Shortage	03090009
2438445	02220	P	600	03/30/2017	04/03/2017	Projected Shortage	03150005
2438446	02220	P	200	04/06/2017	04/10/2017	Projected Shortage	03150006
2438351	02220	R	480	03/23/2017	03/23/2017	Shortage	02280002

Details Comments Date/Time Operations Components Order Rel

Qty To Start: 480 Production Rate: 100.00
 Yield: 100 % Run Crew Size: 1
 Qty To Complete: 480 Run Crew Productivity: 100.00
 Planned Scrap: 0 Line Productivity: 100.00
 Quantity Open: 480 Run Time (Hrs): 4.80
 Setup Time (Hrs): 0.0
 Required Capacity (Hrs): 4.80

Remarks:

Drag a column header here to group by that column

ID	Item Number	Status	Qty To Start	Release	Due	Component Status	Production Order
2438451	02220	F	15	03/15/2017	03/20/2017	Projected Shortage	1018
2438439	02220	F	200	03/23/2017	03/27/2017	Projected Shortage	03150003
2438436	02220	P	120	03/13/2017	03/15/2017	Projected Shortage	03090009
2438445	02220	P	600	03/30/2017	04/03/2017	Projected Shortage	03150005
2438446	02220	P	200	04/06/2017	04/10/2017	Projected Shortage	03150006
2438351	02220	R	480	03/23/2017	03/23/2017	Shortage	02280002

Production Order Components

- Drill down to view the status of production order components.

The screenshot displays the QAD software interface for Production Order Components. The main window shows a table of production order components with columns for ID, Shift, Seq, Run Seq 1, Run Seq 2, Run Crew, Item Nu, Setup Time (Hrs), Required Capacity, Status, Component Status, Qty To Star, Open Quantit, Release, Due, and Resource. A blue arrow points from the 'Components' tab in the main table to a detailed view of a specific component (52220) on the right. The detailed view shows a table with columns for Item Number, Component Status, Component PQOH, Item Description, Supply/Demand Summary, Supply/Demand Details, and Inventory Detail. The 'Component Status' column for item 52220 is highlighted as 'Shortage'.

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item Nu	Setup Time (Hrs)	Required Capacity	Status	Component Status	Qty To Star	Open Quantit	Release	Due	Resource
2438		0				02220	0	4.8	R	Shortage	480	480	03/23/2017	03/23/2017	1000
2438		1				52220	0	5.4	F	Projected Shortage	540	540	03/23/2017	03/23/2017	1000
2438		2				02200	0	2.5	A	Shortage	245	245	03/23/2017	03/23/2017	1000
2438		3				52221	0	4.9	F	Projected Shortage	490	490	03/23/2017	03/27/2017	1000
2438		4				02220	0	2	F	Projected Shortage	200	200	03/23/2017	03/27/2017	1000
2438		5				52220	0	4	F	Projected Shortage	400	400	03/23/2017	03/23/2017	1000

Item Number	Component Status	Component PQOH	Item Description
02010	Shortage		Motor Asm Conne
52220	Shortage		Motor Mtg Plate A
52280	Shortage		Seat Adj Switch A
62221	Shortage		24V Amp, 1HP, 1/2
62520	Shortage		4 Way Switch

Date	Demand	Supply	Auth PQOH
03/13/2017	120	0	60
03/21/2017	0	300	60
03/23/2017	0	540	60
03/23/2017	0	400	60
03/23/2017	480	0	-420
03/23/2017	200	0	-420
03/30/2017	0	600	-420
03/30/2017	0	200	-420
03/30/2017	600	0	-420
04/06/2017	0	200	-420
04/06/2017	200	0	-420

Production Order Components

- Drill down to view the status of production order components.

The screenshot displays the QAD software interface for Production Order Components. The top navigation bar includes tabs for Processes, Planning and Scheduling Work..., Production Orders, Progress Editor, and Item Production Line Maintenance. The bottom navigation bar includes tabs for Details, Comments, Date/Time, Operations, Components, Order Relationships, Production Activity, Production CUM Activity, Compliance, and Accounting Data. The main window shows a table of production order components with columns for Item Number, Component Status, Component PQOH, Item Description, Open Quantity, Qty Required, Quantity Allocated, Quantity Picked, Quantity Issued, Work Center, Op, Buyer/Planner, and Item Type. A dropdown menu is open over the 'Component Status' column, showing 'Shortage' for all listed items.

Item Number	Component Status	Component PQOH	Item Description	Open Quantity	Qty Required	Quantity Allocated	Quantity Picked	Quantity Issued	Work Center	Op	Buyer/Planner	Item Type
02010	Shortage		Motor Asm Connect	480	480	480	0	0	1000	0	0	AUTO
52220	Shortage		Motor Mtg Plate As	480	480	480	0	0	1000	0	0	AUTO
52280	Shortage		Seat Adj Switch Ass	480	480	480	0	0	1000	0	0	AUTO
62221	Shortage		24V Amp, 1HP, 1/2 D	480	480	480	0	0	1000	0	0	AUTO
62520	Shortage		4 Way Switch	480	480	480	0	0	1000	0	0	AUTO

Projected quantities for component

- Drill down to view projected on-hand inventory with Demand/Supply Details panel.

The screenshot displays the QAD software interface, specifically the 'Production Orders' tab. The 'Production Scheduling' panel is active, showing a list of production orders. A blue arrow points from the 'Production Scheduling' panel to the 'Demand/Supply Details' panel, indicating the drill-down action.

The 'Production Scheduling' panel shows a table of production orders with columns: ID, Shift, Seq, Run Seq 1, Run Seq 2, Run Crew, Item Nu, Setup Time (Hrs), Required Capacity, Status, Component Status, Qty To Star, Open Quantit, Release, Due, and Resource. The table lists several production orders, including 2438, 2439, 2440, 2441, 2442, and 2443, with their respective quantities and dates.

The 'Demand/Supply Details' panel is also visible, showing a table of demand and supply data. The table has columns: Date, Demand, Supply, Auth PQOH, Sched PQOH, Plan PQOH, Source, and Reference. The table lists demand and supply data for various dates, including 03/13/2017, 03/15/2017, 03/16/2017, 03/23/2017, 03/30/2017, 04/06/2017, and 04/06/2017.

Demand/Supply Details

- Time-phased projected quantity on hand (PQOH) for the component.

Details Comments Date/Time Operations Components Order Relationships Production Activity Production CUM Activity Compliance Accounting Data									
Components									
Item Number	Component Status	Component PQOH	Supply/Demand Summary Supply/Demand Details Inventory Detail						
02010	Shortage		Supply/Demand Details						
Date	Demand	Supply	Auth PQOH	Sched PQOH	Plan PQOH	Source	Reference		
	0	0	310	310	310	Beginning Available			
03/13/2017	120	0	310	310	190	Prod Order. Line: 1000	Prod Order: 03090009 ID: 2438436 Assembly: 02220 ST: P		
03/15/2017	0	290	310	310	480	Prod Order	Prod Order: 02270009 ID: 2438331 ST: P		
03/15/2017	15	0	310	295	465	Prod Order. Line: 1000	Prod Order: 1018 ID: 2438451 Assembly: 02220 ST: F		
03/23/2017	0	200	310	295	665	Prod Order	Prod Order: 02280020 ID: 2438371 ST: P		
03/23/2017	480	0	-170	-185	185	Prod Order. Line: 1000	Prod Order: 02280002 ID: 2438351 Assembly: 02220 ST: R		
03/23/2017	200	0	-170	-385	-15	Prod Order. Line: 1000	Prod Order: 03150003 ID: 2438439 Assembly: 02220 ST: F Seq:		
03/30/2017	0	600	-170	-385	585	Prod Order	Prod Order: 02280021 ID: 2438372 ST: P		
03/30/2017	600	0	-170	-385	-15	Prod Order. Line: 1000	Prod Order: 03150005 ID: 2438445 Assembly: 02220 ST: P		
04/06/2017	0	200	-170	-385	185	Prod Order	Prod Order: 02280022 ID: 2438373 ST: P		
04/06/2017	200	0	-170	-385	-15	Prod Order. Line: 1000	Prod Order: 03150006 ID: 2438446 Assembly: 02220 ST: P		

Authorized PQOH with
orders status R

Scheduled PQOH with
orders status F, E, A, and R

Planned PQOH with
orders status P, F, E, A, R

Component Availability for an Order

- From production order to a component, to component's supply/demand

The screenshot displays the QAD software interface, specifically the 'Production Orders' window. The 'Production Scheduling' tab is active, showing a table of production orders. A blue box highlights the '2438351' order, and a blue arrow points from it to the 'Components' tab. The 'Components' tab shows a list of components, with '2438351' highlighted. Another blue arrow points from this component to the 'Supply/Demand Summary' tab. The 'Supply/Demand Summary' tab shows a table of supply and demand data for the component '2438351'.

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item Nu	Setup Time (Hrs)	Required Capacity	Status	Component Status	Qty To Star	Open Quantit	Release	Due	Resource
2438351	0	0				02220	0	4.8	R	Shortage	480	480	03/23/2017	03/23/2017	1000
2438352	1					52220	0	5.4	F	Projected Shortage	540	540	03/23/2017	03/23/2017	1000
2438412	2					02200	0	2.5	A	Shortage	245	245	03/23/2017	03/23/2017	1000
2438330	3					52221	0	4.9	F	Projected Shortage	490	490	03/23/2017	03/27/2017	1000
2438439	4					02220	0	2	F	Projected Shortage	200	200	03/23/2017	03/27/2017	1000
2438453	5					52220	0	4	F	Projected Shortage	400	400	03/23/2017	03/23/2017	1000

Item Number	Component Status	Component PQOH	Item Description	Open Quantity	Qty Required	Quant
02010	Shortage		Motor Asm Connect	480	480	
52220	Shortage		Motor Mtg Plate As	480	480	
52280	Shortage		Seat Adj Switch As	480	480	
62221	Shortage		24V Amp, 1HP, 1/2 U	480	480	
62520	Shortage		Way Switch	480	480	

Date	Demand	Supply	Auth PQOH	Sched PQOH	Plan PQOH	Source
03/13/2017	0	0	310	310	310	Beginning Available
03/15/2017	120	0	310	310	190	Prod Order Line: 1000
03/15/2017	0	290	310	310	480	Prod Order
03/15/2017	15	0	310	295	465	Prod Order Line: 1000
03/23/2017	0	200	310	295	665	Prod Order
03/23/2017	480	0	-170	-185	185	Prod Order Line: 1000
03/23/2017	200	0	-170	-385	-15	Prod Order Line: 1000
03/30/2017	0	600	-170	-385	585	Prod Order
03/30/2017	600	0	-170	-385	-15	Prod Order Line: 1000
04/06/2017	0	200	-170	-385	185	Prod Order
04/06/2017	200	0	-170	-385	-15	Prod Order Line: 1000

Shortage Report

- Visibility of production order component shortages

Component shortages for the production line

Item Number	Item Description	Component Status	Quantity Short	Open Quantity	Order Allocation	Issue Date	Next Scheduled Receipt	Quantity	Receipt Source	Receipt
02010	Motor Asm Connect	Shortage	-480	480	480	03/06/2017		0		
52220	Motor Mtg Plate As	Shortage	-480	480	480	03/06/2017	03/09/2017	540	Prod Order. Line: 1	Prod O
52280	Seat Adj Switch Ass	Shortage	-480	480	480	03/06/2017		0		
62221	24V Amp. 1HP. 1/2 D	Shortage	-480	480	480	03/06/2017		0		
62520	4 Way Switch	Shortage	-480	480	480	03/06/2017		0		
02010	Motor Asm Connect	Projected Shortage	-120	120	0	03/13/2017		0		
52220	Motor Mtg Plate As	Projected Shortage	-120	120	0	03/13/2017	03/09/2017	540	Prod Order. Line: 1	Prod O
52280	Seat Adj Switch Ass	Projected Shortage	-120	120	0	03/13/2017		0		

Production Order Maintenance

ID	Item Number	Status	Qty To Start	Release	Component Status
2438436	02220	P	120	03/13/2017	Projected Shortage
2438439	02220	P	200	03/23/2017	Projected Shortage
2438445	02220	P	600	03/30/2017	Projected Shortage
2438446	02220	P	200	04/06/2017	Projected Shortage
2438351	02220	R	480	03/06/2017	Shortage

Parent production order for the selected component

Shortage Report and Demand/Supply

- Drill down from a shortage, to an order, to a component, to its supply/demand

The screenshot illustrates the drill-down process in the QAD software interface. The top section shows the 'Shortage Report' with a table of items and their quantities. A blue arrow points from a shortage entry (Item 52220, Motor Mfg Plate As) to the 'Production Order Maintenance' section. Below this, a table lists production orders for Item 02220. Another blue arrow points from a specific production order (2438436) to the 'Components' section. A third blue arrow points from a component (52220, Motor Mfg Plate As) to the 'Supply/Demand Summary' table. This table shows the demand and supply for the component over time, with a blue arrow pointing to a specific date (03/13/2017) where a shortage is indicated.

Item Number	Item Description	Component Status	Quantity Short	Open Quantity	Order Allocation	Issue Date	Next Scheduled Receipt	Quantity	Receipt Source	Receipt Reference
02010	Motor Asm Connect	Shortage	-480	480	480	03/06/2017		0		
52220	Motor Mfg Plate As	Shortage	-480	480	480	03/06/2017	03/09/2017	540	Prod Order. Line: 1	Prod Order: 02
52280	Seat Adj Switch Ass	Shortage	-480	480	480	03/06/2017		0		
62221	24V Amp, 1HP, 1/2 D	Shortage	-480	480	480	03/06/2017		0		
62520	4 Way Switch	Shortage	-480	480	480	03/06/2017		0		
02010	Motor Asm Connect	Projected Shortage	-120	120	0	03/13/2017		0		
52220	Motor Mfg Plate As	Projected Shortage	-120	120	0	03/13/2017	03/09/2017	540	Prod Order. Line: 1	Prod Order: 02
52280	Seat Adj Switch Ass	Projected Shortage	-120	120	0	03/13/2017		0		

ID	Item Number	Status	Qty To	Start	Release	Component Status
2438436	02220	P	120	03/13/2017		Projected Shortage
2438439	02220	P	200	03/23/2017		Projected Shortage
2438445	02220	P	600	03/30/2017		Projected Shortage
2438446	02220	P	200	04/06/2017		Projected Shortage
2438351	02220	R	480	03/06/2017		Shortage

Item Number	Component Status	Item Description
02010	Projected Shortage	Motor Asm Connect
52220	Projected Shortage	Motor Mfg Plate As
52280	Projected Shortage	Seat Adj Switch Ass
62221	Projected Shortage	24V Amp, 1HP, 1/2 D
62520	Projected Shortage	4 Way Switch

Date	Demand	Supply	Auth PQOH	Sched PQOH	Plan PQOH	Source
03/06/2017	480	0	-420	-420	-420	Prod Order. Lin
03/09/2017	0	540	-420	120	120	Prod Order. Lin
03/13/2017	120	0	-420	120	0	Prod Order. Lin
03/23/2017	200	0	-420	120	-200	Prod Order. Lin
03/30/2017	0	600	-420	720	400	Prod Order. Lin
03/30/2017	0	200	-420	720	600	Prod Order. Lin
03/30/2017	600	0	-420	720	0	Prod Order. Lin
04/06/2017	0	200	-420	720	200	Prod Order. Lin
04/06/2017	200	0	-420	720	0	Prod Order. Lin

Additional Tools

Production Picklist Browse

- Review production picklists with shortages
 - Production order and component item
 - Shortage quantity
 - Destination information for transfer

Processes | Picklist Shortage Browse | Production Picklist Browse | Production Picklist Shortage U... | Planning and Scheduling Work... | Production Picklist Transfer | Production Picklist Reverse

Actions | Setup | Cancel | Add to Favorites

Search

Picklist Number starts at Search Clear All

Viewing 1 - 10 of 10 Records per page: 100

Site	Picklist	Picklist Type	Production	Product	Item Number	Qty Open	Qty Short	Qty Picked	Location	Production Line	Destination	Work Center
10-202	RP10000	1 Order	03260002	2352342	62301	0.0	0.0	10.0	202	ASSY-01	200	2280
10-200	RP10003	0 Order	02280002	2438351	52220	0.0	420.0	0.0		1000		
10-200	RP10003	0 Order	02280002	2438351	52280	0.0	170.0	0.0		1000	020	
10-200	RP10003	0 Order	02280002	2438351	62221	0.0	360.0	0.0		1000		
10-200	RP10003	1 Order	02280002	2438351	02010	480.0	0.0	0.0	010	1000		
10-200	RP10003	1 Order	02280002	2438351	52220	60.0	0.0	0.0	020	1000		
10-200	RP10003	1 Order	02280002	2438351	62221	120.0	0.0	0.0	020	1000		
10-200	RP10004	0 Bulk	03060004	2438412	02002	0.0	245.0	0.0		1000	010	1000
10-200	RP10005	0 Bulk	03060004	2438412	62201	0.0	245.0	0.0		1000	020	1000
10-200	RP10005	1 Bulk	03060004	2438412	62500	245.0	0.0	0.0		1000	020	

Monitor Material Shortages

- Collection provides visibility across sites, production lines, and work centers

Component shortages

Supply and demand for the component item

The screenshot displays two windows from the QAD software. The top window, 'Monitor Material Shortages', shows a list of component items with shortages. The bottom window, 'Supply/Demand Summary', shows the supply and demand details for a specific component item.

Monitor Material Shortages Window:

Search: ((Site = '10-200') and (Due Date < 3/19/2017))

Site: 10-200, Buyer/Planner: , Due Date: Next Week

Viewing 1 - 276 of 276, Records per page: 500

Component Item	Item Description	Item Status	Gross Req	Quantity Short	Parent Item	ID	Order Status	Release Da	Production Line	Work Center
02002	Electrical Connector	Shortage	245.0		02200	2438412	A	3/6/2017	1000	1000
02010	Motor Asm Connector	Shortage	480.0		02220	2438351	R	3/6/2017	1000	
52200	Motor Mounting Plate Asm	Shortage	245.0		02200	2438412	A	3/6/2017	1000	1000
52220	Motor Mtg Plate Asm	Shortage	480.0		02220	2438351	R	3/6/2017	1000	
52280	Seat Adj Switch Assy	Shortage	480.0		02220	2438351	R	3/6/2017	1000	
62201	24V Amp 2HP, 1/2 Dia	Shortage	245.0		02200	2438412	A	3/6/2017	1000	1000
62221	24V Amp, 1HP, 1/2 Dia	Shortage	480.0		02220	2438351	R	3/6/2017	1000	
62250	Steel CRS 18ga 4301	Projected Shortage	612.5		52221	2438330	F	3/6/2017	1000	1020
62500	8 Way Switch	Shortage	245.0		02200	2438412	A	3/6/2017	1000	
62520	4 Way Switch	Shortage	480.0		02220	2438351	R	3/6/2017	1000	

Supply/Demand Summary Window:

Viewing 1 - 4 of 4, Records per page: 100

ID	Component Item	Type	Status Category	Prior Demand	Demand	On-Hand/PQOH	Authorized Rpts/PQOH	Scheduled Rpts/PQOH	Planned Rpts/PQOH
2438351	02010	Supply							
2438351	02010	Demand	Allocated						
2438351	02010	Demand	Firm						
2438351	02010	Demand	Planned						

Key Takeaways

Summary

- Monitor and analyze material shortages and component availability using:
 - Production Scheduling Workbench tools
 - Schedules with production order component status
 - Panels with production order components, component supply/demand and PQOH
 - Shortage Report
 - Additional tools
 - Production Picklist Browse
 - Monitor Material Shortages

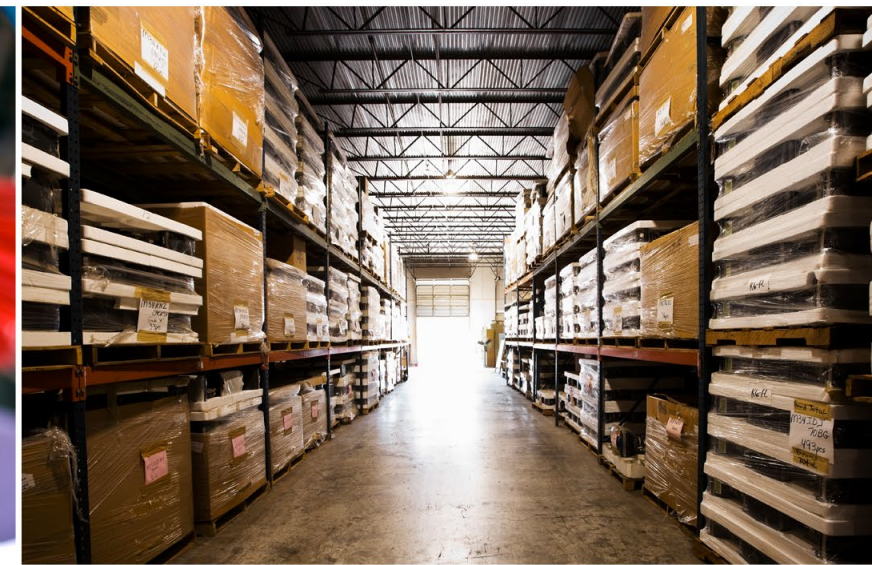
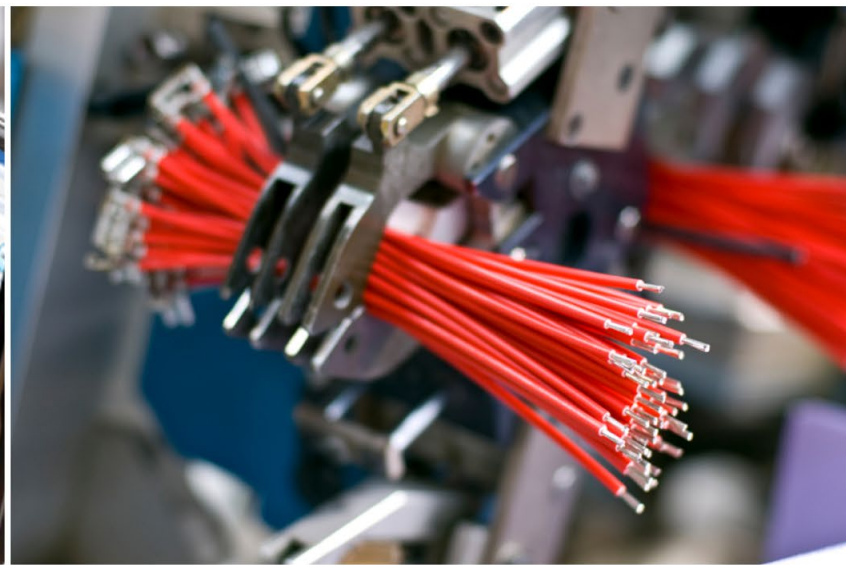
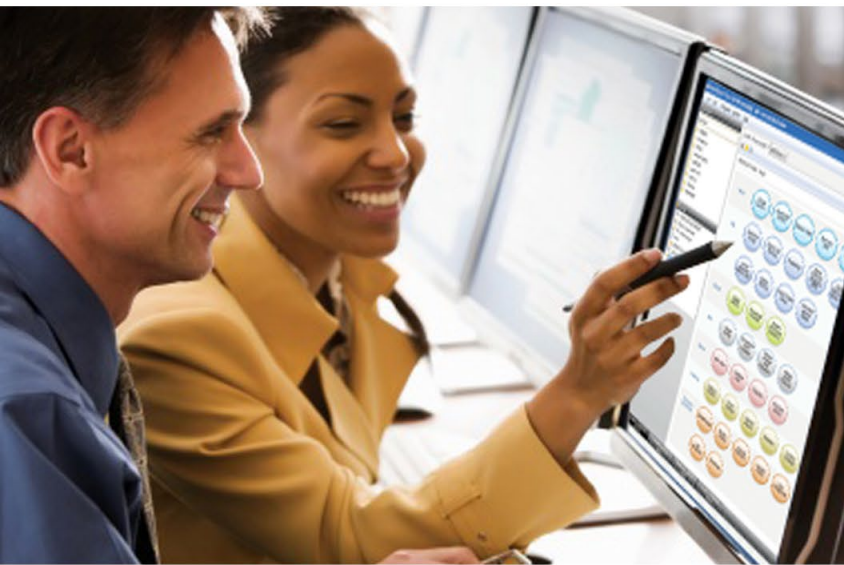
Questions

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Authorize Production

Production Order Training
2017



Lesson Overview

- Scenarios for authorizing production:
 - Pick inventory and then release an order
 - Release order for picking and production
 - Release order without a picklist
 - Paperless authorization
- Key Takeaways
- Summary

Objectives

- Be able to authorize production for orders in a variety of different scenarios, including those that require picklists.
- Use functions to support additional scenarios.

Prerequisites

- Basic understanding of work orders and or repetitive scheduled orders

Primary Audience

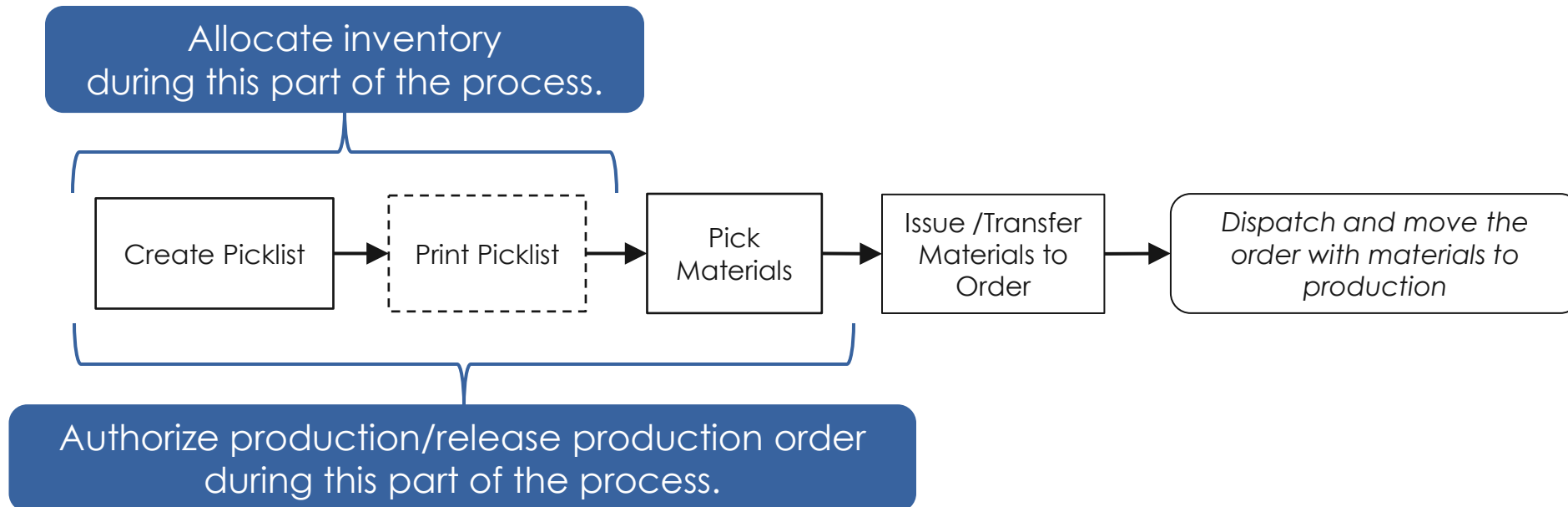
- Business analysts
- Implementation managers
- Production schedulers
- Operations managers
- Production managers
- Materials managers

What is it to Authorize Production?

- When you authorize production, you can start working on the production order.
- The production order does not have to be released.

Authorizing Production and Order Preparation

- Authorizing production/releasing a production order is independent from the process for preparing materials for an order.



Work Orders and Repetitive Orders

- QAD supports the authorization of both work orders and repetitive orders, together with any number of the following:
 - Order status is set to a minimum (threshold) status
 - Order sheet has been printed
 - Materials have been allocated in advance
 - Picklist has been printed for the order
 - Materials have been picked for the order

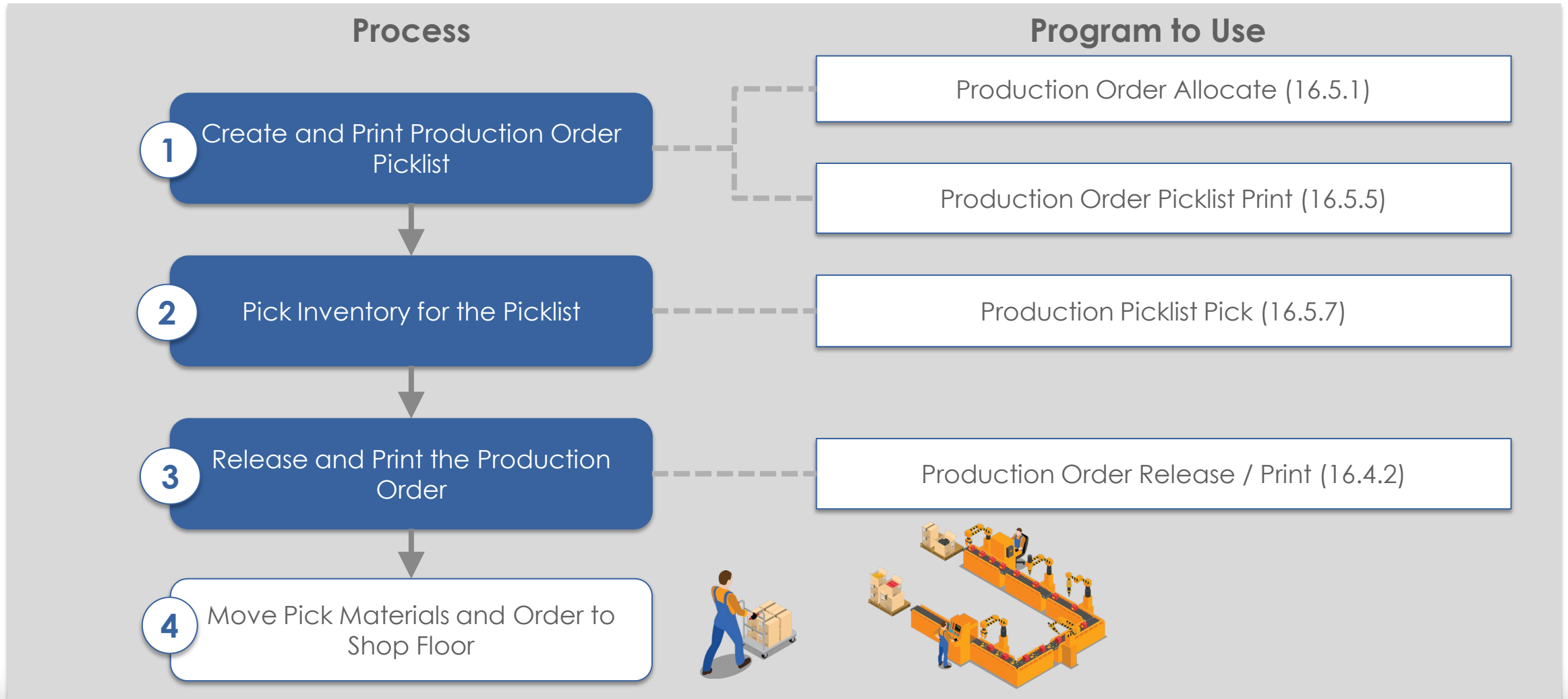
Production Authorization Scenarios

- Pick inventory and then release an order to production.
- Release an order for picking and production.
- Release an order without a picklist.
- Paperless authorization for production.

Pick Inventory and then Release Order

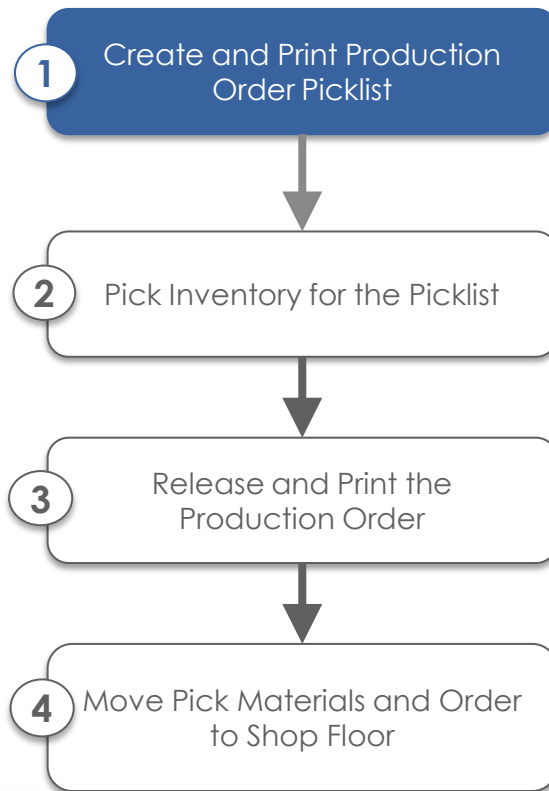
- Scenario
 - When a significant time is required for the stockroom to pick inventory for a production order.
- Procedure
 1. Print a picklist for a production order.
 2. Pick inventory for the picklist.
 3. Release the order with an order sheet.
 4. Deliver the order sheet and picked materials to the shop floor.

Pick Inventory and then Release Order



Pick then Release

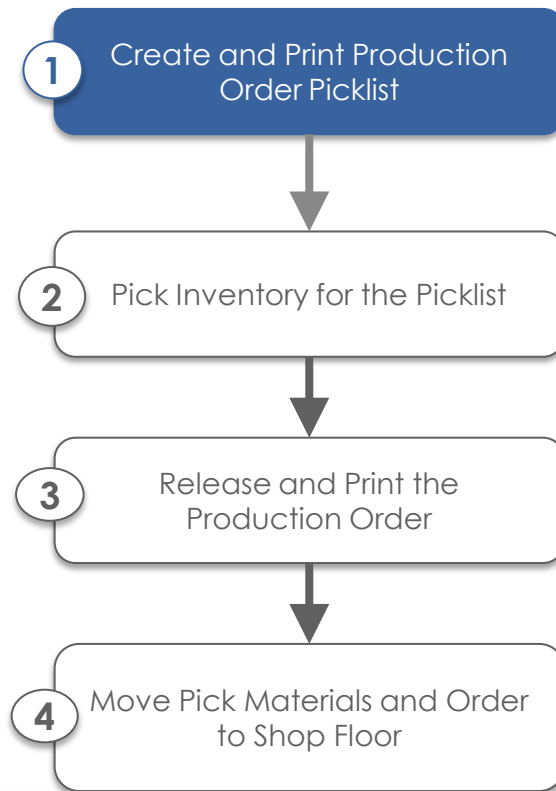
- Production Order Allocate (16.5.1)



Filter Name	Operator	Search Icon	Reset Icon	Minus	Text Field	Plus	Minus
Production Order	equals			-		+	x
ID	equals			-		+	x
Release Date	equals			-		+	x
Item Number	equals			-		+	x
Scheduler	equals			-		+	x
Production Line	equals			-		+	x
Shift	equals			-		+	x
Site	equals			-		+	x
Order Status	equals			-		+	x
Include Discrete/Rep/	equals			-	Both	+	x

Pick then Release

- Production Order Picklist Print (16.5.5)



Processes x Production Order Picklist Print... x

Filter Viewer

New Filter Open Save Save As Delete Settings Layout Schedule

Search Conditions

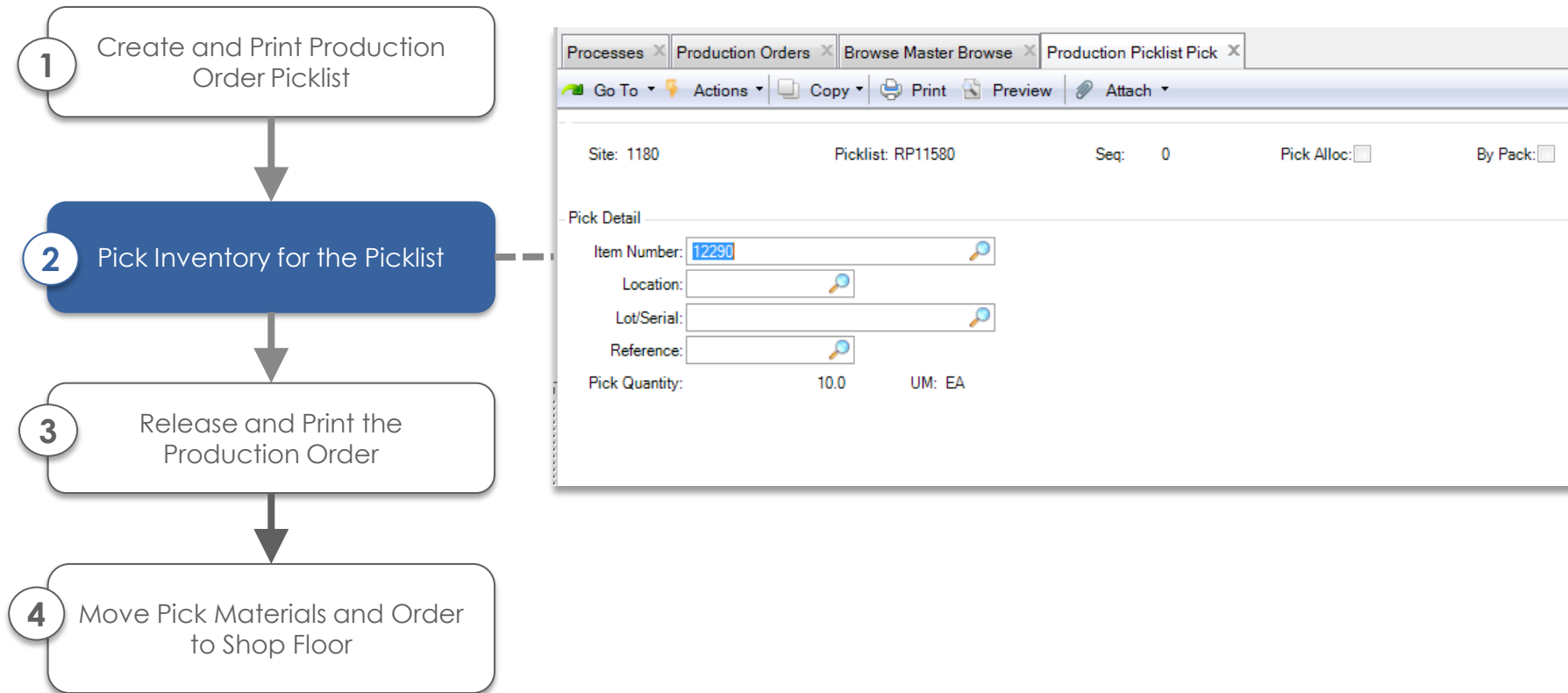
Picklist	equals								
Site	equals	dys-0001							
Production Line	equals								
Shift	equals								
Release Date	equals								
Production Order	equals								
ID	equals								
Include Work Order/	equals	Both							
Reprint Picklist	equals	No							
Print Shortage Tags	equals	No							

Include Work Order/ Repetitive with selection of WO, Rep, or Both

Print Shortage Tags

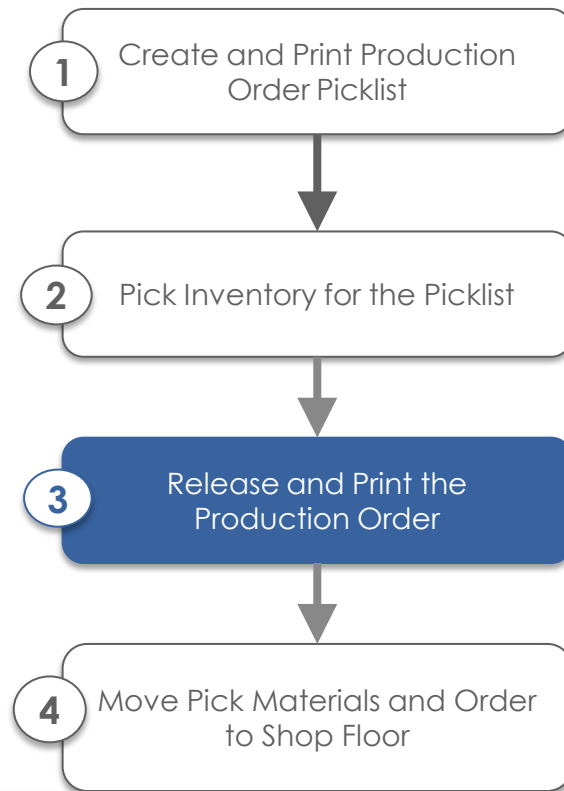
Pick then Release

- Production Picklist Pick (16.5.7)



Pick then Release

- Production Order Release / Print (16.4.2)



The screenshot shows the 'Production Order Release/Print' window. It features a 'Filter' tab and a 'Viewer' tab. Below the tabs is a toolbar with icons for 'New Filter', 'Open', 'Save', 'Save As', 'Delete', 'Settings', 'Layout', and 'Schedule'. The main area is titled 'Search Conditions' and contains a list of search criteria with dropdown menus and input fields. The criteria include: Production Order, ID, Batch, Release Date, Due Date, Item Number, Scheduler, Production Line, Shift, BOM/Formula Code, Site, Order Status, Include MPS/non-MP, and Include GRC Items. Each criterion has a dropdown menu set to 'equals' and a corresponding input field. The 'Include MPS/non-MP' dropdown is set to 'Both'. The 'Include GRC Items' dropdown is also set to 'Both'.

Include Work Order/ Repetitive
with selection of WO, Rep, or Both

The screenshot shows the 'Include Work Order/ Repetitive' window. It features a list of search criteria with dropdown menus and input fields. The criteria include: Include Phantom Item, Include Kanban Items, Include Work Order/Repetitive, Search for records matching desired conditions, Include Subcontract, Move First Operation, Calculate Picklist, Print Picklist, Picklist Sort By, Page Break By Sort, Print Shortage Tags, Remarks, Print Production Order, Include Routing, Include Components, and MSW Selected to Print. Each criterion has a dropdown menu set to 'equals' and a corresponding input field. The 'Include Work Order/Repetitive' dropdown is set to 'Both'. The 'Print Production Order' dropdown is set to 'Unprintd'.

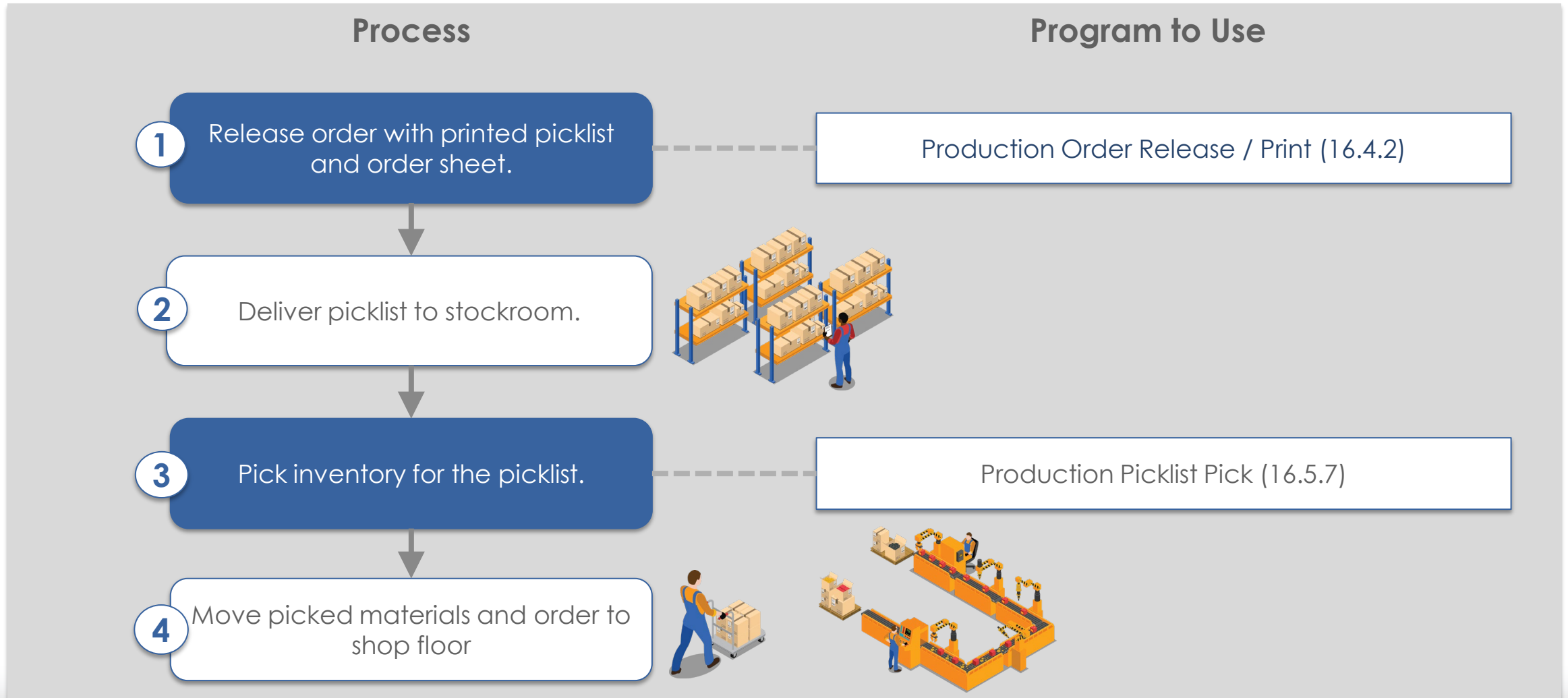
Production Authorization Scenarios

- Pick inventory and then release an order to production.
- **Release an order for picking and production.**
- Release an order without a picklist.
- Paperless authorization for production.

Release Order for Picking and Production

- Scenario
 - When little or no time is required to pick materials.
 - Some material is stocked on the shop floor.
- Procedure
 1. Release the order together with a printed order sheet and printed picklist.
 2. Deliver picklist to stockroom.
 3. Pick necessary inventory.
 4. Deliver the order sheet and picked materials to the shop floor.

Release for Picking and Production



Release for Picking Production

- Production Order Release / Print (16.4.2)

1 Release order with printed picklist and order sheet.

2 Deliver picklist to stockroom.

3 Pick inventory for the picklist.

4 Move picked materials and order to shop floor.

The screenshot shows the 'Production Order Release/Print' window. It has a menu bar with 'Filter' and 'Viewer'. Below the menu bar is a toolbar with icons for 'New Filter', 'Open', 'Save', 'Save As', 'Delete', 'Settings', 'Layout', and 'Schedule'. The main area is titled 'Search Conditions' and contains a table of search criteria. Each row has a dropdown for the field name, a dropdown for the operator (all set to 'equals'), a text input field, and a dropdown for the value. The fields include: Production Order, ID, Batch, Release Date, Due Date, Item Number, Scheduler, Production Line, Shift, BOM/Formula Code, Site, Order Status, Include MPS/non-MP, and Include GRC Items. The 'Include MPS/non-MP' field is set to 'Both'.

Field	Operator	Value
Production Order	equals	
ID	equals	
Batch	equals	
Release Date	equals	
Due Date	equals	
Item Number	equals	
Scheduler	equals	
Production Line	equals	
Shift	equals	
BOM/Formula Code	equals	
Site	equals	
Order Status	equals	
Include MPS/non-MP	equals	Both
Include GRC Items	equals	

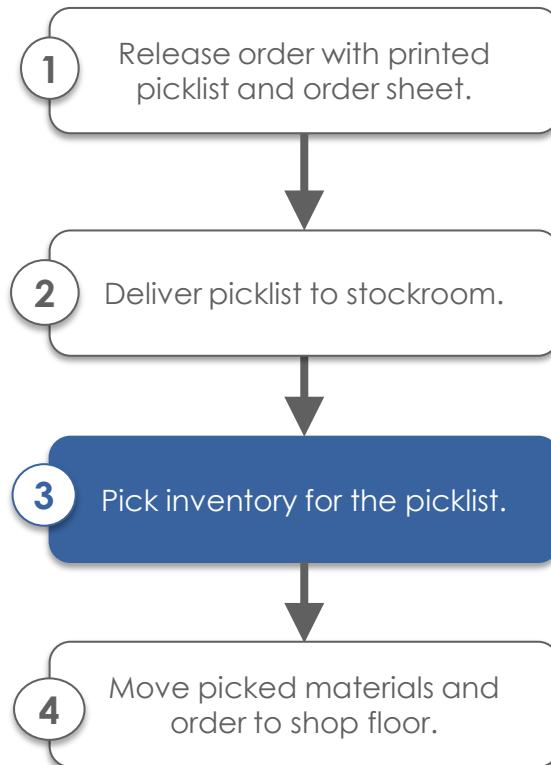
Options for creating and printing various documents.

The screenshot shows the 'Options for creating and printing various documents' window. It contains a list of options, each with a dropdown for the field name, a dropdown for the operator (all set to 'equals'), and a dropdown for the value. The options include: Include Phantom Item, Include Kanban Items, Include Work Order/R, Search for records matching desired conditions, Include Subcontract, Move First Operation, Calculate Picklist, Print Picklist, Picklist Sort By, Page Break By Sort, Print Shortage Tags, Remarks, Print Production Order, Include Routing, Include Components, and MSW Selected to Pri. The 'Print Picklist' option is highlighted with a red box.

Field	Operator	Value
Include Phantom Item	equals	no
Include Kanban Items	equals	no
Include Work Order/R	equals	Both
Search for records matching desired conditions		
Include Subcontract	equals	no
Move First Operation	equals	yes
Calculate Picklist	equals	yes
Print Picklist	equals	Unprintd
Picklist Sort By	equals	Location
Page Break By Sort	equals	yes
Print Shortage Tags	equals	no
Remarks	equals	
Print Production Order	equals	Unprintd
Include Routing	equals	yes
Include Components	equals	yes
MSW Selected to Pri	equals	no

Release for Picking Production

- Production Picklist Pick (16.5.7)



Processes x Production Orders x Browse Master Browse x Production Picklist Pick x

Go To Actions Copy Print Preview Attach

Site: 1180 Picklist: RP11580 Seq: 0 Pick Alloc: By Pack:

Pick Detail

Item Number: 12290 Location: Lot/Serial: Reference:

Pick Quantity: 10.0 UM: EA

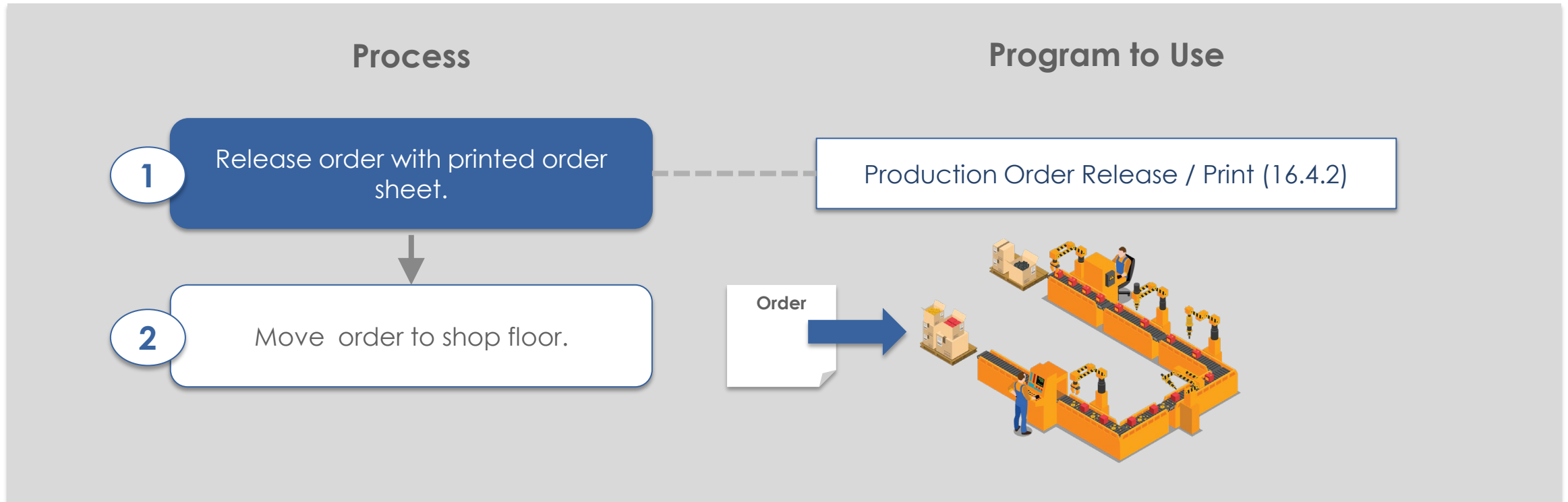
Production Authorization Scenarios

- Pick inventory and then release an order to production.
- Release an order for picking and production.
- **Release an order without a picklist.**
- Paperless authorization for production.

Release Order without a Picklist

- Scenario:
 - When necessary materials are located on the shop floor and do not require picking.
- Procedure:
 1. Release the order and print an order sheet.
 2. Deliver the order sheet to the shop floor.

Release Order without a Picklist



Release without Picklist

- Production Order Release / Print (16.4.2)

1 Release order with printed order sheet.

2 Move order to shop floor.

The screenshot shows the 'Production Order Release/Print' window. It has a menu bar with 'Filter' and 'Viewer'. Below the menu bar is a toolbar with icons for 'New Filter', 'Open', 'Save', 'Save As', 'Delete', 'Settings', 'Layout', and 'Schedule'. The main area is titled 'Search Conditions' and contains a list of search criteria with dropdown menus and input fields. The criteria include: Production Order, ID, Batch, Release Date, Due Date, Item Number, Scheduler, Production Line, Shift, BOM/Formula Code, Site, Order Status, Include MPS/non-MP, and Include GRC Items. Each criterion has a dropdown menu set to 'equals' and an input field. There are also buttons for 'Search' and 'Reset'.

Options for creating and printing various documents.

The screenshot shows a detailed view of the 'Include Phantom Item' and 'Include Kanban Items' options. It includes a search bar with the text 'Search for records matching desired conditions'. Below the search bar are several rows of options, each with a dropdown menu and a button. The options include: Include Phantom Item, Include Kanban Items, Include Work Order/R, Include Subcontract, Move First Operation, Calculate Picklist, Print Picklist, Picklist Sort By, Page Break By Sort, Print Shortage Tags, Remarks, Print Production Order, Include Routing, Include Components, and MSW Selected to Pri.

Production Authorization Scenarios

- Pick inventory and then release an order to production.
- Release an order for picking and production.
- Release an order without a picklist.
- **Paperless authorization for production.**

Paperless Authorization for Production

- Scenario:
 - When work is performed to schedule and no order sheet is required.
 - Necessary materials are located on the shop floor and do not require picking.
 - Orders are visible on system displays.
- Procedure:
 1. The minimum value for Production Activity Threshold must be set up in Production Order Control.
 2. Order is authorized when its status changes to meet or exceed the minimum Production Activity Threshold value.
 3. Order status automatically changes to Released when an inventory or shop floor transaction is processed for the order.

Paperless Authorization

- Production Order Control (16.3.24)

Processes | Production Orders | Production Order Control

Go To | Actions | Copy | Print | Preview

Work Order Data

Production Activity Threshold: A Allocated

Repetitive Order Data

Transfer Work in Process: ☒

WIP Transfer Acct: 1600 Mech

End Eff Default Method: 3

End Effective Days: 20

Completion Consumption Method: Window Use consumption window

Consume Forward: 10

Consume Back: 10

Start of Week: Mon

Begin Consumption: EffDate

Production Activity Threshold: R Released

Production Activity Threshold for work orders and for repetitive orders.

Processes | Production Order Control

Go To | Actions | Copy | Print | Preview | Attach

Site Information

Site: 10-500 Pharmaceutical Mfg Site

Production Activity Threshold - Work Order: A Allocated

Production Activity Threshold - Repetitive: E Exploded

Open Qty Method: QtyComp Quantity Completed

Completion Consumption Method: Window Use consumption window

Consume Back: 10

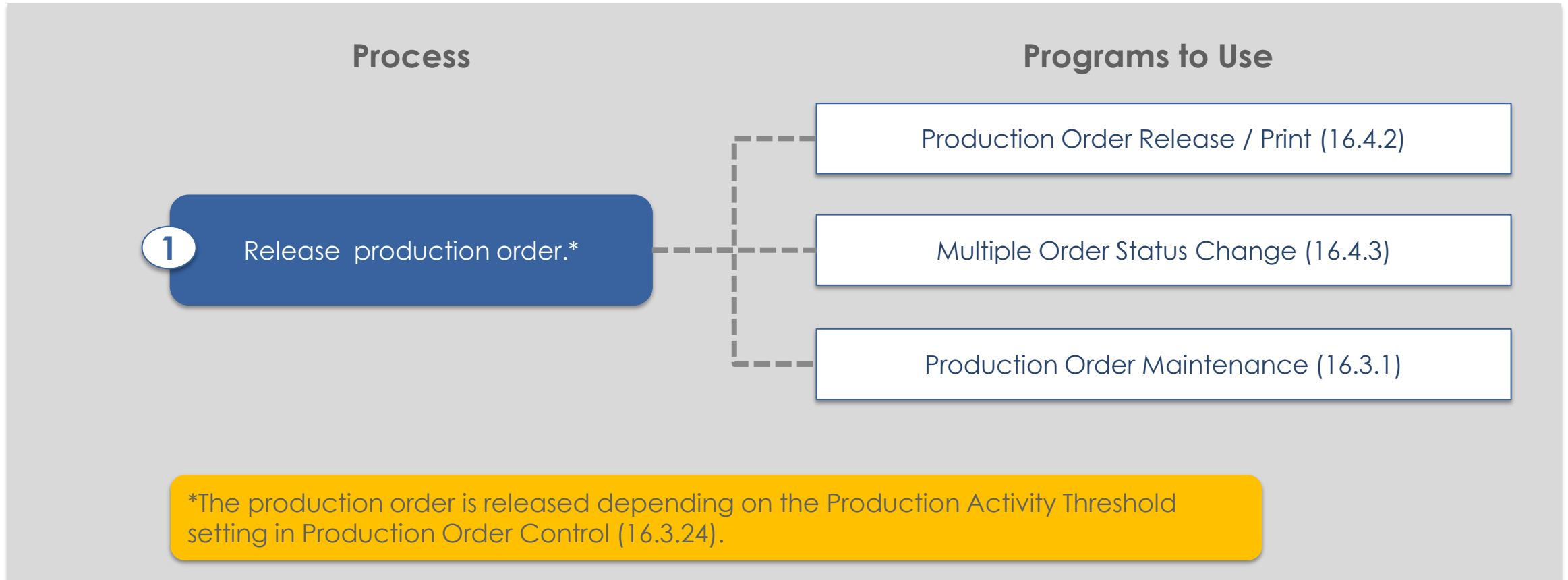
Consume Forward: 10

Start of Week: Mon

Begin Consumption: EffDate

Site level control parameters.

Process: Paperless Authorization



Paperless Authorization

- Production Order Release / Print (16.4.2)

1 Release production order.

The screenshot shows the 'Production Order Release/Print' window with a 'Filter' tab selected. The 'Search Conditions' section contains a list of fields with dropdown menus and input boxes. The fields are: Production Order, ID, Batch, Release Date, Due Date, Item Number, Scheduler, Production Line, Shift, BOM/Formula Code, Site, Order Status, Include MPS/non-MP, and Include GRC Items. Each field has a dropdown menu set to 'equals' and an input box. There are also icons for search and reset for each field.

Options for creating and printing various documents.

The screenshot shows the 'Include Phantom Item' and 'Include Kanban Items' sections. The 'Include Phantom Item' section has a dropdown menu set to 'equals' and an input box set to 'no'. The 'Include Kanban Items' section has a dropdown menu set to 'equals' and an input box set to 'no'. The 'Include Work Order/R' section has a dropdown menu set to 'equals' and an input box set to 'Both'. The 'Search for records matching desired conditions' section has a dropdown menu set to 'equals' and an input box set to 'Search for records matching desired conditions'. The 'Include Subcontract' section has a dropdown menu set to 'equals' and an input box set to 'no'. The 'Move First Operation' section has a dropdown menu set to 'equals' and an input box set to 'yes'. The 'Calculate Picklist' section has a dropdown menu set to 'equals' and an input box set to 'yes'. The 'Print Picklist' section has a dropdown menu set to 'equals' and an input box set to 'Unprintd'. The 'Picklist Sort By' section has a dropdown menu set to 'equals' and an input box set to 'Location'. The 'Page Break By Sort' section has a dropdown menu set to 'equals' and an input box set to 'yes'. The 'Print Shortage Tags' section has a dropdown menu set to 'equals' and an input box set to 'no'. The 'Remarks' section has a dropdown menu set to 'equals' and an input box set to 'Remarks'. The 'Print Production Order' section has a dropdown menu set to 'equals' and an input box set to 'Unprintd'. The 'Include Routing' section has a dropdown menu set to 'equals' and an input box set to 'yes'. The 'Include Components' section has a dropdown menu set to 'equals' and an input box set to 'yes'. The 'MSW Selected to Pri' section has a dropdown menu set to 'equals' and an input box set to 'no'.

Paperless Authorization

- Production Activity Transaction to demonstrate threshold

Key Takeaways

What's New and What's Different

- Picking inventory for an order is now independent from releasing an order.
- Printing order sheets is now independent from releasing an order.
- You can now release and print picklists and order sheets for repetitive.
- Production activity threshold now determines the minimum order status for production.

Capabilities

- Production authorization can be extended to all types of orders – work orders and repetitive orders.
- Picklist and order sheets are independent and decoupled from order release process.
- Production Activity Threshold parameter determines when production can be reported for work orders and repetitive orders.

Summary

- Scenarios for authorizing production:
 - Pick inventory then release an order
 - Release order for picking and production
 - Release order without a picklist
 - Paperless authorization
- Processes for picking and production authorization processes can be adapted for different types of orders and scenarios.

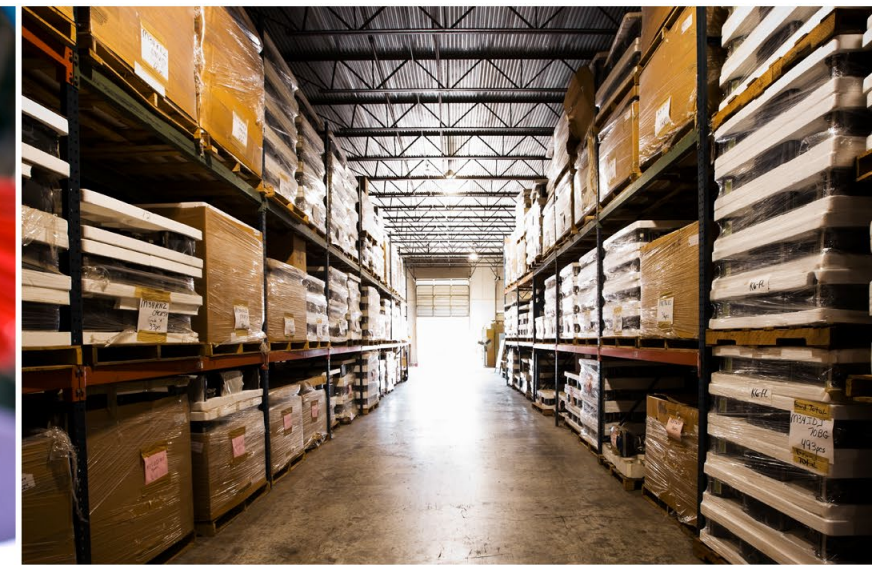
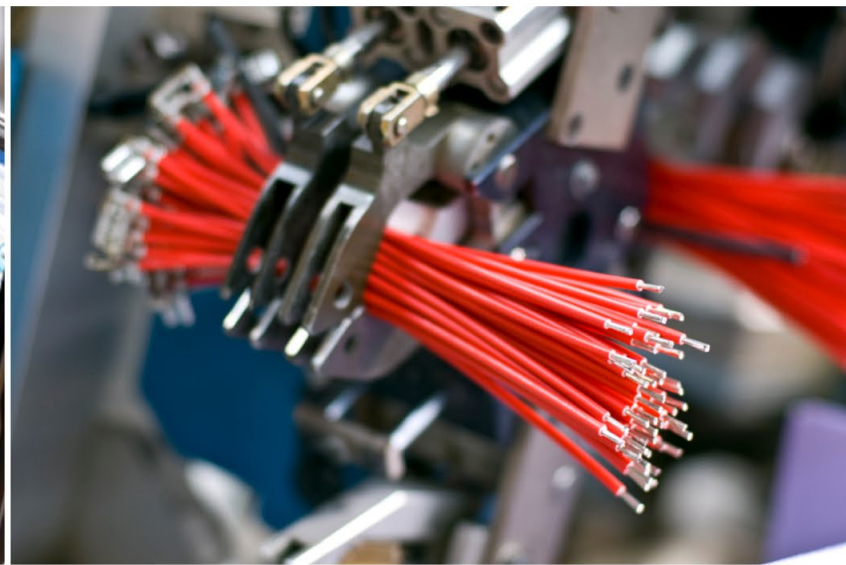
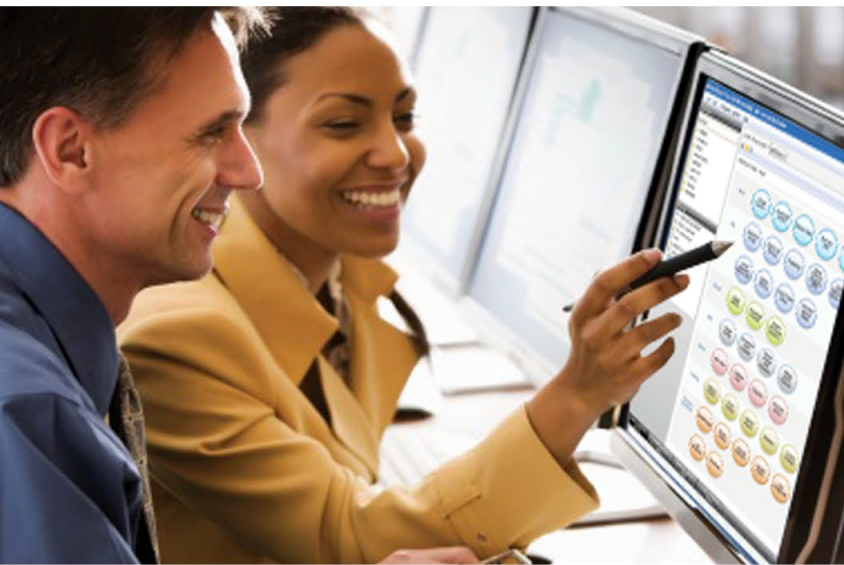
Questions

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Authorize Production for a Production Line

Production Order Training
2017



Lesson Overview

- Introduction
- Authorize production for a production line
- Key Takeaways

Objectives

- Scheduling Workbenches
 - Full visibility of orders, capacity, and materials
 - Flexible filter tools for selecting orders
 - Simple selection of one or more orders for production line, or production line and work center
 - Capability to reschedule orders prior to processing
- Core functions such as Production Order Release/Print and Multiple Orders Status Change
 - Selection filters for scheduler, production line, release date

Prerequisites

- Completed training for Authorize Production which covered processes and scenarios for:
 - Pick inventory and then release an order
 - Release order for picking and production
 - Release order without a picklist
 - Paperless authorization

Primary Audience

- Business analysts
- Implementation managers
- Production schedulers
- Operations managers
- Production managers
- Materials managers

Introduction

Authorization Tasks

- Authorize Production for a Production Line
 - Production line
 - Release date
 - Scheduler (assigned to a production line)
 - Shift

Supporting Functions

- Scheduling Workbenches
 - Production Scheduling Workbench
 - Master Scheduling Workbench
- Production Order Release/Print
- Multiple Order Status Change

Supporting Production Order Selection

- Production order fields
 - Production order
 - ID
 - Item
 - Site
 - Production Line
 - Release Date
 - Due Date
 - Order Status
 - Shift

The screenshot displays the 'Production Order Maintenance' window in QAD. The window has a title bar with tabs for 'Processes', 'Production Order Maintenance', and 'Item Planning Maintenance'. Below the title bar is a menu bar with options: 'Go To', 'Actions', 'Copy', 'Print', 'Preview', and 'Attach'. The main content area is divided into several sections. At the top, there are input fields for 'Production Order: 1013' and 'ID: 2438348'. Below these are 'Item Number: 02220' and 'Motor Asm 4-Way Seat Adj'. Further down is 'Site: 10-200'. The 'Order Type:' section shows 'Production Line: 1000' and 'Assembly'. Below this, there are two columns of dates and status: 'Release Date: 2/27/2017', 'Due Date: 3/1/2017', and 'Order Status: F' on the left; 'Order Date: 2/27/2017', 'Need Date: 3/1/2017', and 'Mfg Type: WO' on the right. The 'Quantity to Complete:' is 120.0, and 'Quantity to Start:' is 120.0. 'Estimated Yield Percent:' is 100.00%. 'Estimated Qty To Scrap:' is 0.0, 'Actual Qty Completed:' is 0.0, and 'Actual Qty Scrapped:' is 0.0. There are checkboxes for 'Order Sheet Printed:' and 'Comments:'. On the right side, there are fields for 'Production Seq: 0.0', 'Shift:', 'Routing Code:', 'BOM/Formula Code:', 'Sales/Job:', 'Supplier:', and 'Split Order Cum ID:'.

Selection for Scheduler

- Defined for
 - Production Line
 - Work Center

Processes x Production Line Maintenance x

Go To Actions Copy Print Preview Attach

Site: 10-200
Production Line: 1000
Description: Assembly
Units/Hour: 100.00
Enable Run Size: ☐
Number of Lines: 1.0
Duration Buffer (D H:M:S): 0 00:00:00
Setup Time (D H:M:S): 0 00:00:00
Backflush Location:
Auto Firm: ☐ Last Auto Firm:
Scheduler: Alex
Time Period: DAY Period Number: 0 Calculate Date: 3/2/2017

Processes x Production Line Maintenance x Work Center Maintenance x

Go To Actions Copy Print Preview Attach

Work Center: 1000 Machine:
Description: General Assembly
Department: 0400 Assembly
Scheduler: Alex
Supplier:
Scheduling Horizon: 0 Backflush Location:
Auto Firm: ☐ Last Auto Firm:
Queue Time: 0.25 Wait Time: 0.25
Mach/Op: 1 Setup Rate: 5.000
Setup Crew: 1.00 Labor Rate: 4.500
Run Crew: 1.000 Labor Burden Rate: 0.020
Machines: 1.000 Labor Bdn %: 0.01%
Mach Bdn Rate: 0.050

Scheduling Workbench to Verify Schedule

- Verify and sequence production orders before authorization.

Maintain Sequence

Move production order to different release date

The screenshot displays the QAD Scheduling Workbench interface. The top section shows a 'Production Scheduling' table with columns for ID, Shift, Seq, Run Seq 1, Run Seq 2, Run Crew, Item Nu, and Setup Tir. Below this, a detailed view for a specific production order (ID 2438348) is shown, including required and remaining hours, and a table of production orders with columns for ID, Item Number, Status, Qty To Start, Release, Due, Component Status, and Production Order.

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item Nu	Setup Tir
2435774		1				02200	
2435689		2				02200	

ID	Item Number	Status	Qty To Start	Release	Due	Component Status	Production Order
2435748	52200	F	72	07/18/2016	07/18/2016	Sched Rcpts Delayed	w0716022-13
2435749	52200	F	72	07/18/2016	07/18/2016	Sched Rcpts Delayed	w0716022-14
2435750	52200	F	72	07/18/2016	07/18/2016	Sched Rcpts Delayed	w0716022-15
2435751	52200	F	50	07/18/2016	07/18/2016	Sched Rcpts Delayed	w0716022-16
2438341	02200	F	150	02/27/2017	02/27/2017	Projected Shortage	1007
2438343	02220	F	94	02/27/2017	02/27/2017	Projected Shortage	1009
2438340	02220	F	200	03/10/2017	03/15/2017	Planned Receipts	1006

Scheduling Workbench for Release/Print

1. In the Product Order Maintenance tab, filter and select one or more orders.
2. Right click and select Release/Print.
3. Save.

Visibility of orders scheduled for a production line resource

The screenshot displays the QAD Scheduling Workbench interface. The top navigation bar includes tabs for 'Processes', 'Planning and Scheduling Work...', and 'Production Order Release/Print...'. The 'Production Order Release/Print...' tab is active, showing a 'Production Scheduling' section with a calendar view for 02/27, indicating 'Required: 9.85 Hours (244)' and 'Remaining: -9.85 Hours (-985)'. Below this, a table lists production orders with columns for ID, Shift, Seq, Run Seq 1, Run Seq 2, Run Crew, Item Number, and Setup. A context menu is open over the table, showing options like 'Status', 'Release/Print', 'Group By Selector', 'Display Filter', 'Columns', 'Calculate Due Date', 'Calculate Release Date', 'Calculate Component Availability', 'Undo Changes', 'Export', and 'Update Release Date'. The 'Release/Print' option is highlighted.

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item Nu	Setup
2438		0				02200	
2438		0				02220	

ID	Item Number	Status	Qty To Start	Release	Due	Component Status	Production Order
2438348	02220	F	120	03/16/2017	03/16/2017	Planned Receipts	1013
2438340	02220	F	200	03/10/2017	03/15/2017	Planned Receipts	1006
2438341	02200	F	150	02/27/2017	02/27/2017	Projected Shortage	1007
2438343	02220	F	94	02/27/2017	02/27/2017	Projected Shortage	1009
2435679	52200	F	72	03/02/2017	03/02/2017	Sched Bkts Delayed	W0716022
2435711	52200	F	72	03/02/2017	03/02/2017		W0716022-1
2435712	52200	F	72	03/02/2017	03/02/2017		W0716022-2
2435713	52200	F	72	07/18/2017	07/18/2017		W0716022-3
2435714	52200	F	72	07/18/2017	07/18/2017		W0716022-4
2435715	52200	F	72	07/18/2017	07/18/2017		W0716022-5
2435716	52200	F	72	07/18/2017	07/18/2017		W0716022-6
2435717	52200	F	72	07/18/2017	07/18/2017		W0716022-7
2435743	52200	F	72	07/18/2017	07/18/2017		W0716022-8
2435744	52200	F	72	07/18/2017	07/18/2017		W0716022-9
2435745	52200	F	72	07/18/2017	07/18/2017		W0716022-10
2435746	52200	F	72	07/18/2017	07/18/2017		W0716022-11

Scheduling Workbench Release/Print Flag

- Release/Print flag is set automatically when order is processed for Release/Print.
- Can be updated manually in Details panel

The screenshot displays the QAD Scheduling Workbench interface. The top section shows a summary of production scheduling data, including required and remaining hours, carry over, and a table of production lines. The bottom section shows the 'Details' panel for a specific production line, where the 'Release/Print' flag is checked.

Production Scheduling Summary:

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item Number	Setup Time (Hrs)	Required Capacity	Status	Component Status	Qty To Start	Open Quantity	Release
2438351	0					02220	0	12	R	Shortage	480	480	03/06/2017
2438412	0					02200	0	12.3	A	Shortage	245	245	03/06/2017

Details Panel:

Qty To Start:	Yield:	Qty To Complete:	Planned Scrap:	Quantity Open:	Production Rate:	Run Crew Size:	Run Crew Productivity:	Line Productivity:	Run Time (Hrs):	Setup Time (Hrs):	Primary Line:	Scheduled Line:	Number of Lines:	Duration Buffer (Hrs):	Duration Hours:	Projected Duration Days:	Site:	Order Type:	Mfg Type:	Cum ID:	Order Sheet Printed:	Release/Print:
480	100 %	480	0	480	40.00	1	100.00	100.00	12.00	0.0	1000	1000	1.0	0.0	12.00	0.00	10-200	WO			☐	☒

Scheduling Workbench to Change Status

1. In the Product Order Maintenance tab, filter and select one or more orders.
2. Right click and select Status to change status to Released.
3. Save.

Visibility of orders scheduled for a production line resource

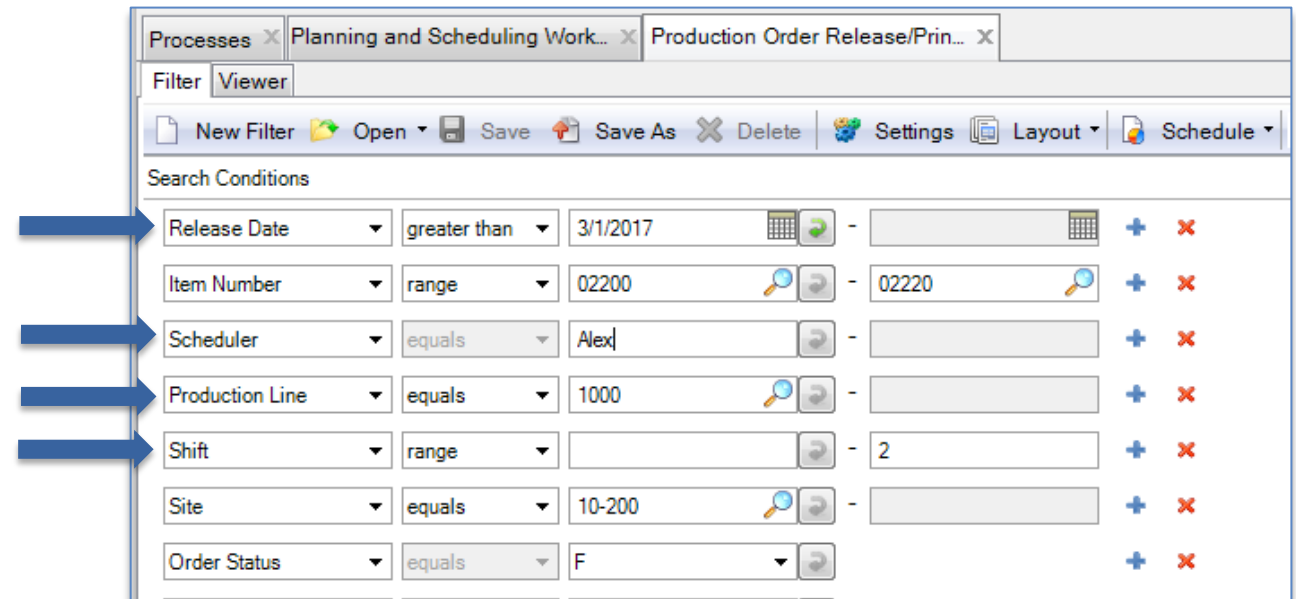
The screenshot displays the QAD Scheduling Workbench interface. The 'Production Order Maintenance' tab is active, showing a list of production orders. A right-click context menu is open over the selected row, with the 'Status' option highlighted. The 'Status' submenu is also visible, showing the 'Released' status selected. The table below shows the data for the selected row and other orders.

ID	Shift	Seq	Run Seq 1	Run Seq 2	Run Crew	Item Nu	Setup Tim
2438		0				02200	
2438		0				02220	

ID	Item Number	Status	Qty To Start	Release	Due	Component Status	Production Order
2438348	02220	F	120	03/16/2017	03/16/2017	Planned Receipts	1013
2438340	02220	F	200	03/10/2017	03/15/2017	Planned Receipts	1006
2438341	02200	F	150	02/27/2017	02/27/2017	Projected Shortage	1007
2438343	02220	F	94	02/27/2017	02/27/2017	Projected Shortage	1009
2435679	52200	F					0716022
2435711	52200	F					0716022-1
2435712	52200	F					0716022-2
2435713	52200	F					0716022-3
2435714	52200	F					0716022-4
2435715	52200	F					0716022-5
2435716	52200	F					0716022-6
2435717	52200	F					0716022-7
2435743	52200	F					0716022-8
2435744	52200	F					0716022-9
2435745	52200	F					0716022-10
2435746	52200	F					0716022-11

Production Order Release/Print

- Filter processing of orders with
 - Release Date
 - Scheduler (for production lines)
 - Production Line
 - Shift



The screenshot shows the 'Production Order Release/Print' window with the 'Filter' tab selected. The 'Search Conditions' section lists several filters with blue arrows pointing to them from the left:

Field	Operator	Value	Buttons
Release Date	greater than	3/1/2017	+ x
Item Number	range	02200	+ x
Scheduler	equals	Alex	+ x
Production Line	equals	1000	+ x
Shift	range	2	+ x
Site	equals	10-200	+ x
Order Status	equals	F	+ x

Set **MSW Select to Print = Yes** to print orders processed to Release/Print when using MSW or PSW

Paperless Authorization for Production

- Scenario:
 - When work is performed to schedule and no order sheet is required.
 - Necessary materials are located on the shop floor and do not require picking.
 - Orders are visible on system displays.
- Procedure:
 1. The minimum value for Production Activity Threshold must be set up in Production Order Control.
 2. Order is authorized when its status changes to meet or exceed the minimum Production Activity Threshold value.
 3. Order status automatically changes to Released when an inventory or shop floor transaction is processed for the order.

Multiple Order Status Change

- Filter for orders by entering:
 - Production Line
 - Shift
 - Release Date

Change order status to
meet or exceed
Production Activity
Threshold

Processes Multiple Order Status Change

Go To Actions Copy Print Preview Attach

Production Order: ID: Production Line: Shift: Release Date: Due Date: Item Number: Site: BOM/Formula Code:

To: To: To: To: To: To: To: To:

Change from Status: B To: E

Include Work Order/Rep/Both: Both Include Kanban Items: Include Phantom Items: Include MPS/non-MPS Items: Both Include GRC Items:

Output: Batch ID:

Production Activity Threshold

- Production Order Control (16.24)

The screenshot shows the 'Production Order Control' window with two tabs: 'Production Orders' and 'Production Order Control'. The 'Production Order Control' tab is active. The window has a menu bar with 'Go To', 'Actions', 'Copy', 'Print', and 'Preview'. Below the menu bar, there are two sections: 'Work Order Data' and 'Repetitive Order Data'. In the 'Work Order Data' section, the 'Production Activity Threshold' is set to 'A' and 'Allocated'. In the 'Repetitive Order Data' section, the 'Transfer Work in Process' checkbox is checked. Below this, there are several fields: 'WIP Transfer Acct' (1600), 'End Eff Default Method' (3), 'End Effective Days' (20), 'Completion Consumption Method' (Window), 'Consume Forward' (10), 'Consume Back' (10), 'Start of Week' (Mon), and 'Begin Consumption' (EffDate). At the bottom of the 'Repetitive Order Data' section, the 'Production Activity Threshold' is set to 'R' and 'Released'.

Production Activity Threshold for work orders and for repetitive orders.

The screenshot shows the 'Production Order Control' window with the 'Production Order Control' tab active. The window has a menu bar with 'Go To', 'Actions', 'Copy', 'Print', 'Preview', and 'Attach'. Below the menu bar, there is a 'Site Information' section. The 'Site' is set to '10-500' and 'Pharmaceutical Mfg Site'. Below this, there are several fields: 'Production Activity Threshold - Work Order' (A, Allocated), 'Production Activity Threshold - Repetitive' (E, Exploded), 'Open Qty Method' (QtyComp, Quantity Completed), 'Completion Consumption Method' (Window, Use consumption window), 'Consume Back' (10), 'Consume Forward' (10), 'Start of Week' (Mon), and 'Begin Consumption' (EffDate).

Site level control parameters.

Key Takeaways

Summary

- Scheduling Workbenches
 - Full visibility of orders, capacity, and materials
 - Flexible filter tools for selecting orders
 - Simple selection of one or multiple orders for production line, or production line and work center
 - Capability to reschedule orders prior to processing
- Core functions such as Production Order Release/Print and Multiple Orders Status Change
 - Selection filters for scheduler, production line, release date

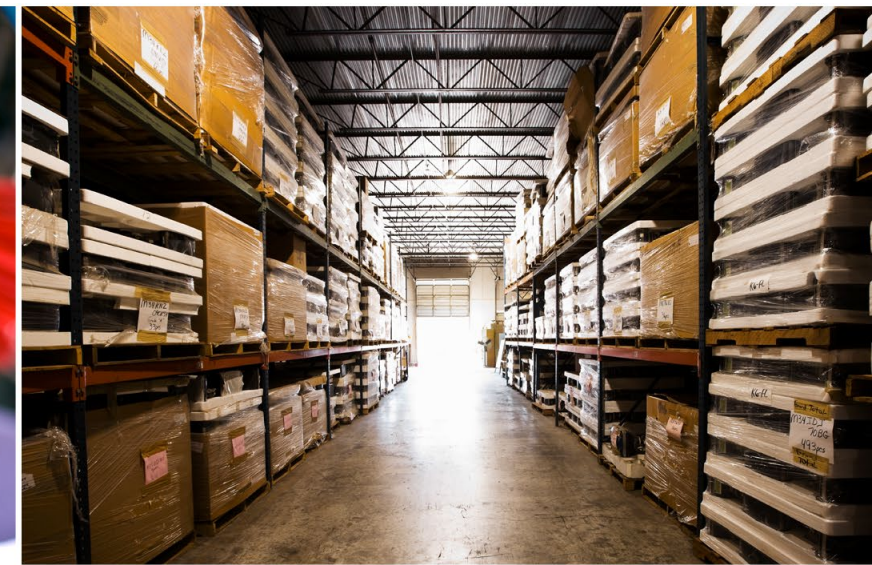
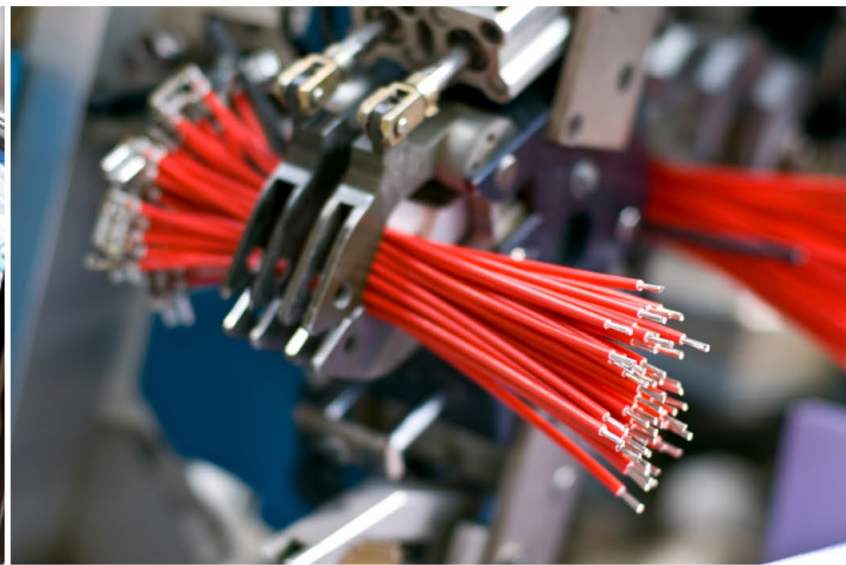
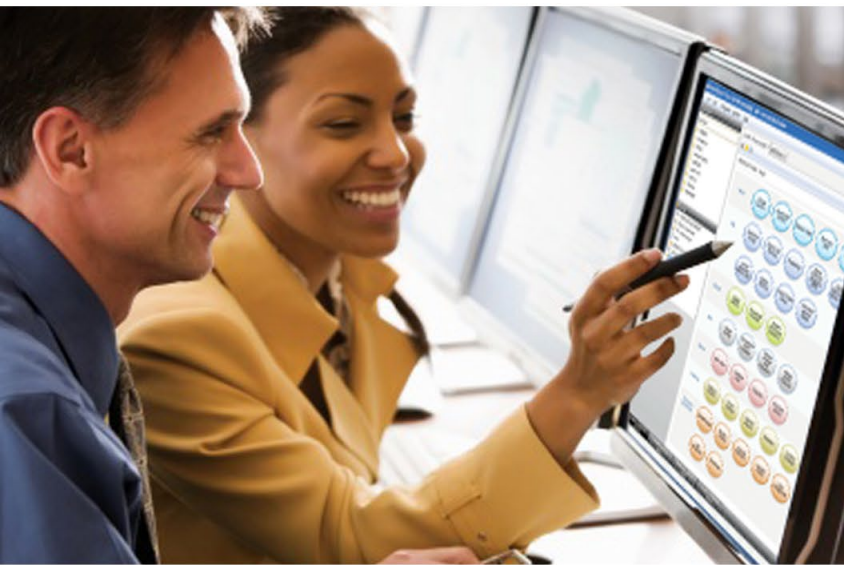
Questions

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Printing Shop Paper

Production Order Training
2017



Lesson Overview

- Scenarios for printing shop paper
- Key Takeaways
- Summary

Objectives

- Print shop paper for production orders for multiple scenarios, for both work orders and repetitive scheduled orders.

Prerequisites

- Basic understanding of work orders and or repetitive scheduled order.

Primary Audience

- Business analysts
- Implementation managers
- Production schedulers
- Operations managers
- Production managers
- Materials managers

Production Authorization Scenarios

- Print a shop paper when an order is released.
- Print a shop paper independently from releasing an order.
- Release an order without a shop paper.
- Print a shop paper for repetitive.

Print Shop Paper When Order is Released

- Scenario
 - When it is not required to review a shop paper and/or prepare documentation for an order before it is dispatched to production.
- Procedure
 1. Release the order along with a printed shop paper.
 2. Dispatch the shop paper along with any picked materials to the shop floor.

Release with Production Order Sheet

- Production Order Release / Print (16.4.2)

Options for creating and printing various documents.

The screenshot displays the 'Production Order Release/Print' window in QAD. The interface includes a 'Filter' tab and a 'Viewer' tab. The 'Search Conditions' section contains several dropdown menus for filtering data, such as 'BOM/Formula Code', 'Site', 'Order Status', 'Include MPS/non-MP', 'Include GRC Items', 'Include Phantom It', 'Include Kanban Items', and 'Include Work Order/R'. Below this, there is a section for document options, including 'Calculate Picklist', 'Print Picklist', 'Picklist Sort By', 'Page Break By Sort', 'Print Shortage Tags', 'Remarks', 'Print Production Order', 'Include Routing', 'Include Components', and 'MSW Selected to Pri'. A blue box highlights the 'Print Picklist' and 'Print Production Order' options, which are both set to 'Unprintd'. The window also features a 'Run' button and a 'Document' dropdown menu.

Print Shop Paper Independently from Order Release

- Scenario
 - When it is necessary to review the shop paper, including component requirements, routing operations, and/or test specifications for a production order.
 - When engineering modifications have been made to the components and/or routing operations to a released order.
 - Reprint or print additional copies of an order.
- Procedure
 1. Print a production order sheet.

- Production Order Sheet Print (16.4.5)

4

Release Orders Without Printing Shop Paper

- Scenario:
 - When production is supported by paperless systems.
- Procedure:
 1. Release the production order but choose not to print a production order sheet.

Release without Production Order Sheets

- Production Order Release / Print (16.4.2)

Options for creating and printing various documents.

The screenshot shows the 'Production Order Release/Print' window. The 'Filter' tab is active, displaying a list of search conditions. Each condition consists of a field name, a comparison operator (all set to 'equals'), and a value. To the right of each condition are blue '+' and red 'x' icons for adding or removing the condition. The conditions listed are:

Field	Operator	Value	Actions
BOM/Formula Code	equals		+ x
Site	equals		+ x
Order Status	equals		+ x
Include MPS/non-MP	equals	Both	+ x
Include GRC Items	equals	no	+ x
Include Phantom It	equals	no	+ x
Include Kanban Items	equals	no	+ x
Include Work Order/R	equals	Both	+ x

The screenshot shows the same window with the 'Document' tab active. It displays a list of options for creating and printing documents. A blue box highlights the 'Print Picklist' option. The options listed are:

Field	Operator	Value	Actions
Calculate Picklist	equals	yes	+ x
Print Picklist	equals	Unprintd	+ x
Picklist Sort By	equals	Location	+ x
Page Break By Sort	equals	yes	+ x
Print Shortage Tags	equals	no	+ x
Remarks	equals		+ x
Print Production Orde	equals	Unprintd	+ x
Include Routing	equals	yes	+ x
Include Components	equals	yes	+ x
MSW Selected to Pri	equals	no	+ x

Print Shop Paper for Repetitive Production

- Scenario:
 - When paper based systems and printed order sheets are required to document production, which is often used in life sciences.
- Procedure:
 1. Print order sheets as part of the production order release process.
 2. Print production order sheet as an independent process.

Release Repetitive Orders with Order Sheets

- Production Order Release / Print (16.4.2)

Select WO, Rep, or Both

Options for creating and printing various documents

Print production order sheet

Processes x Production Order Release/Print x

Filter Viewer

New Filter Open Save Save As Delete Settings Layout Schedule Document Run

Search Conditions

BOM/Formula Code	equals			+	x
Site	equals			+	x
Order Status	equals			+	x
Include MPS/non-MP	equals	Both		+	x
Include GRC Items	equals	no		+	x
Include Phantom It	equals	no		+	x
Include Kanban Items	equals	no		+	x
Include Work Order/R	equals	Both		+	x

Calculate Picklist equals yes + x

Print Picklist equals Unprintd + x

Picklist Sort By equals Location + x

Page Break By Sort equals yes + x

Print Shortage Tags equals no + x

Remarks equals + x

Print Production Order equals Unprintd + x

Include Routing equals yes + x

Include Components equals yes + x

MSW Selected to Pri equals no + x

- Production Order Sheet Print (16.4.5)

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
---	---	---	---	---	---	---	---	---	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	-----

Key Takeaways

Capabilities

- Capability to print a production order sheet to serve as shop paper.
- Production order sheets are independent and decoupled from the order release process.
- Printing production order sheets is extended to all types of orders – work orders and repetitive orders.

Summary

- General scenarios
 - Print a shop paper when an order is released.
 - Print a shop paper independently from releasing an order.
 - Release an order without a shop paper.
 - Print a shop paper for repetitive.
- Processes for printing order sheets can be adapted for different types of orders and scenarios.

Questions

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