



**QAD Adaptive Applications  
Enterprise Edition**

Implementation Guide  
**Production Execution**

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Production Execution 4.0  
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# Change Summary

## Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference
September 2022/v4.0	First release	--

## Chapter 1

# Overview

This chapter gives an overview of the QAD Production Execution setup process. It contains the following topics:

[\*Introduction\*](#)

[\*Setup Considerations and Recommendations\*](#)

## Introduction

QAD Production Execution (PE) provides an interface for shop floor activity. While PE uses its own data, it is heavily reliant on the data in QAD Adaptive ERP.

This guide outlines the base data that needs to be set up before attempting any setup in the PE screens in QAD Adaptive ERP. The base data is the same data that is setup as a part of the QAD Adaptive ERP easy on boarding process. Decisions made at this time could impact how PE is displayed and functions.

The initial QAD Adaptive ERP setup includes the following base data that is required for PE to function properly:

- Domains
- Sites
- Items
- Bills of material
- Backflush/Receipt/NCM locations
- Departments
- Work centers/machines
- Routings
- Production line
- Production line items
- Employees
- Roles
- Shift schedules
- Label printers
- Reason codes

The following is the base data that is optional for PE to function:

- Pack codes
- Item pack data
- Bills of packaging
- Site calendar exceptions
- Site holiday calendars

## Setup Considerations and Recommendations

### Setup Considerations

When setting up QAD Production Execution, it is important to consider the following questions.

Setup Question	Consideration
Will you have unique employee IDs or generic/shared IDs?	If you want to be able to analyze shop floor activity by an employee, a unique ID is needed.
Will work centers share receipt/backflush locations?	If too many work centers share locations, the PE inventory screen can get too busy.
Will you have specific machines in work centers?	If you have specific machines in work centers for which you want to track down time, you will need to have a machine ID.
Do you have products that can be built in a variety of work centers and will be assigned on the shop floor rather than by the scheduler?	If the orders for that item will be scheduled by the shop floor supervisor, a “9999” machine should be set up for that work center and be included on the routing.
Do you want to analyze transactions with detailed reason codes, such as scrap and reject?	Set up normal base data Reason Codes in QAD Adaptive ERP and Sub-Reason Codes, which is a feature only provided with PE.

## Setup Recommendations and Production Execution Tabs

### PE Roles

Company Role	Role Name in PE	Role Importance	Role Purpose
Operator	SFOperator	Mandatory	Production Execution
Administrator	SFAdmin	Mandatory	Production Execution Setup & Maintenance
Supervisor	SFSupervisor	Mandatory	Supervision of Production Execution
Technician	SFTechnician	Optional	Equipment Maintenance
Quality Inspector	SFQuality	Optional	Quality Inspection

## PE Generic Users and Role Association

Company Role	User ID	Role Name in PE
Operator	Oper1, Oper2	SFOperator
Administrator	Admin1, Admin2	SFAdmin
Supervisor	Supv1, Supv2	SFSupervisor
Quality Inspector	Qlty1, Qlty2	SFQuality
Technician	Tech1, Tech2	SFTech

## PE Roles - Tab Association

Company Role	Role Name in PE	Tab Access in PE
Operator	SFOperator	Work Centers
Administrator	SFAdmin	Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, Alarms
Supervisor	SFSupervisor	Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt
Quality Inspector	SFQuality	Overview, Activity Mgmt
Technician	SFTech	Overview, Activity Mgmt

## Production Execution Data Browse Associations

There are a variety of browses that transmit detailed shop floor information to PE. They ensure that QAD Adaptive ERP and PE are in sync, while restricting data setup to the appropriate owning application. This table lists the browses and their intended purpose.

Browse	Message Type	Purpose
mg225	Domain	Provides a list of all active domains in the database.
gp348	Site	Provides a list of the sites defined in the current database.
sf014	Work Center	Provides a list of all work centers defined in the current database.
sf007	EDL	This is a dynamic browse that provides up to the moment status of the active production orders and the work centers where the work is being performed.
sf018	Shift	Contains shift calendar data that defines daily schedules for each process item.

pa019	BOP	Contains packaging structure data that determines the way goods are packaged and stored.
sf021	Line Items	Provides a list of the defined production lines and the specific items which are built on those lines. This is to support repetitive functionality, including scheduled and cumulative orders.
sf013	Inventory Browse	Contains location inventory detail for PE.
gp224	Reason Code	Contains reason codes that are used to categorize and describe different transactions and events. PE provides an additional panel to this browse to support reason subcodes for more detailed explanation and analysis.
sf010	Employee	Contains employee ID records that are to be used in PE.
sf008	Role	Contains shop floor roles that are to be used in PE.
sf009	User Mapping	Provides the link between users and their associated roles.
sf012	Department	Contains a list of the departments defined in the database.
sf019	Pack Code	Contains pack code data that defines the way items and inventory are packaged and stored.
pa003	Item Pack	Contains item packaging data that indicates the packaging hierarchy for each specific item.

## PE Parent and Child Tabs

Parent Tab	Child Tabs
Overview	Order Overview, Employee Overview
Work Centers	Production Orders, Order View, Material Requests, Inventory, Equipment

## Chapter 2

# Setting Up QAD Production Execution

This chapter covers the QAD Production Execution setup process. It includes the following topics:

[Setup Overview](#)

[Setting Up QAD Adaptive ERP Base Data](#)

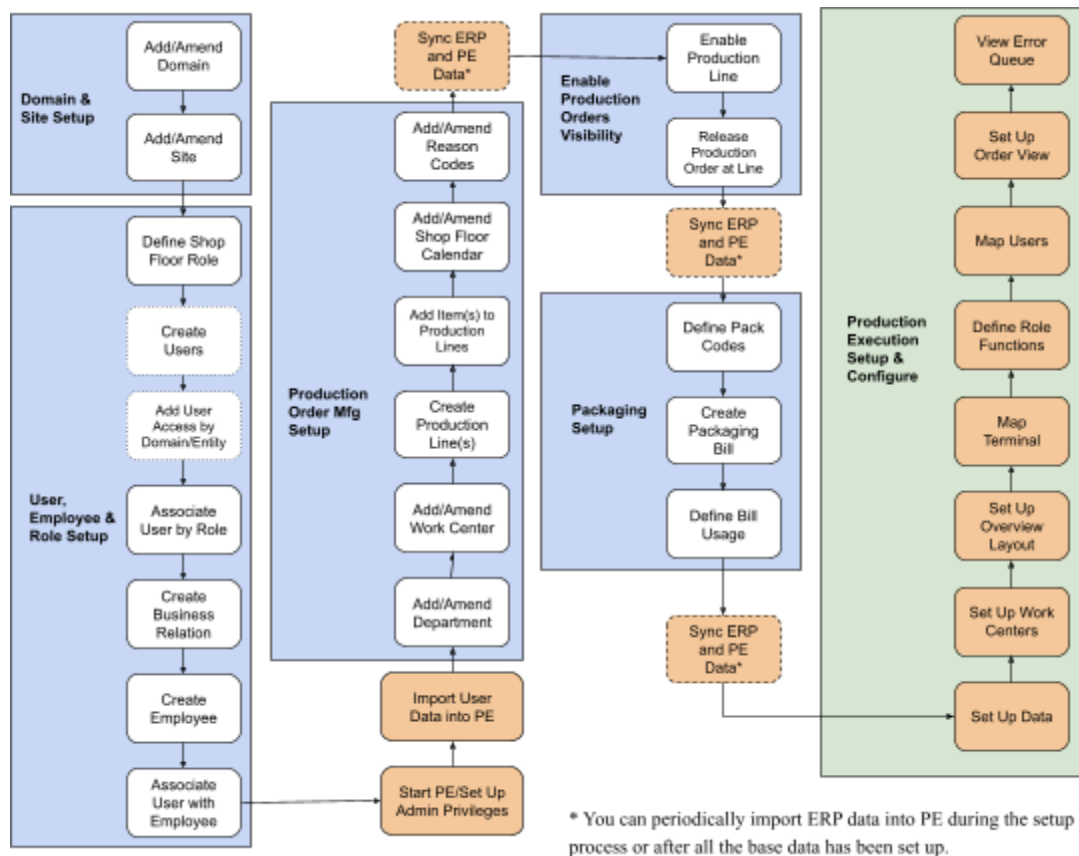
[Configuring PE Screens in QAD Adaptive ERP](#)

## Setup Overview

This section explains the steps required to set up a functional PE environment. The setup information is mainly used during the implementation phase but because production environments are not static, this information also serves as a reference if processes are added or changed.

The following flow chart shows the sequence of steps required to set up the base data in QAD Adaptive ERP, importing that data into QAD Production Execution, and then setting up and configuring PE.

**Note:** After setting up the Users, Employees, and Roles in QAD Adaptive ERP, you must start up PE, set up administrative privileges, and then import the ERP User data into PE. See [Starting PE and Setting up PE Admin Permissions](#).



## Setup Reference

The following table lists the base data that is setup during the initial QAD Adaptive ERP setup and the User or Administration Guides you can reference for detailed information.

Setup	Guide Reference
Domain	<i>QAD Financials User Guide</i>

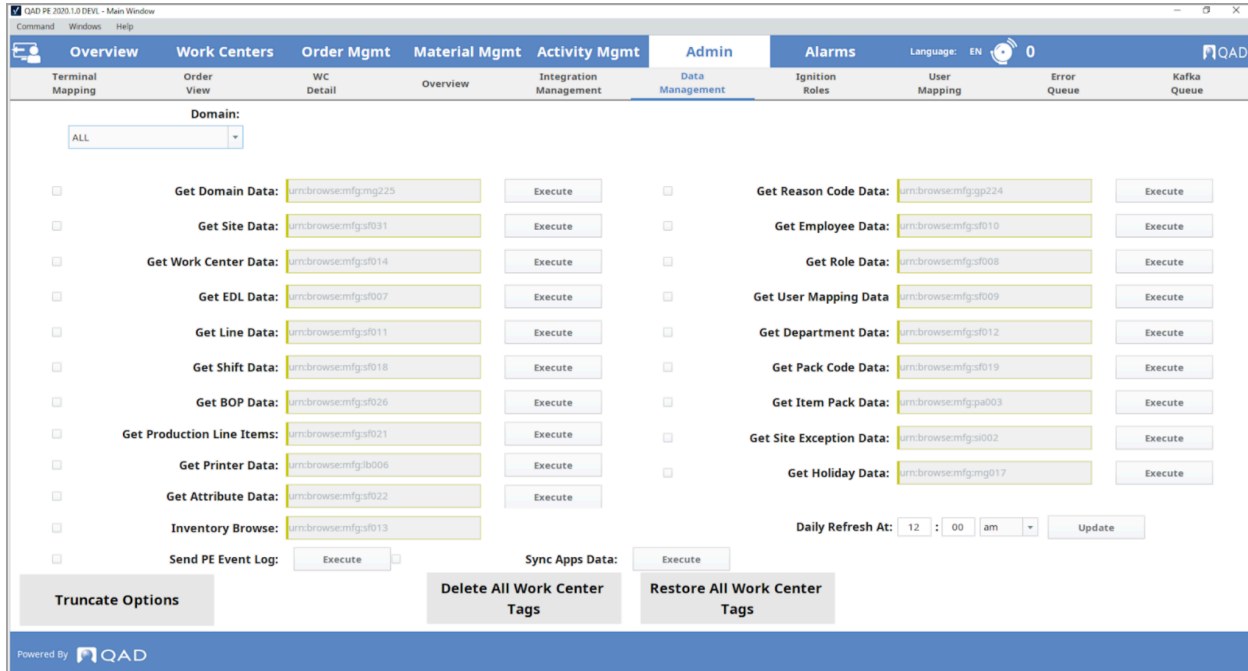
Site	<i>QAD Master Data User Guide</i>
Shop Floor Role	<i>QAD Security Administration Guide</i>
Users	<i>QAD Security Administration Guide</i>
User Access by Domain Entity	<i>QAD Security Administration Guide</i>
Associate User by Role	<i>QAD Security Administration Guide</i>
Business Relation	<i>QAD Financials User Guide</i>
Employee	<i>QAD Security Administration Guide</i>
Associate User to Employee	<i>QAD Security Administration Guide</i>
Department	<i>QAD Production Orders User Guide</i>
Work Center	<i>QAD Production Orders User Guide</i>
Production Lines	<i>QAD Production Orders User Guide</i>
Shop Floor Calendar	<i>QAD System Administration Guide</i>
Reason Codes	Web UI Online help
Enable Production Lines	
Release Production Order at Line	
Packaging Setup	<i>QAD Serialization User Guide</i>

## Importing ERP Data into QAD Production Execution

Once data is defined in QAD Adaptive ERP, it can be imported into PE. This function must be performed by the System Administrator.

In the Admin > Data Management Tab in PE, select the associated Execute button to import the data from the QAD Adaptive ERP browse into PE.

For more information about importing QAD Adaptive ERP master data into PE, see [Data Management](#).



## Setting Up QAD Adaptive ERP Base Data

### Domain Setup

Use the **Domains** screen in QAD Adaptive ERP to create domains.

The business domain is the fundamental building block in your system setup. However, before you can define a domain, a certain amount of base data is required. Default data is supplied with the system. You should verify this data before beginning your setup.

For detailed information about setting up domains, see the *QAD Financials User Guide* in the [QAD Doc Library](#).

For field definitions, see the Web UI online help.

### Site Setup

Use the **Sites** screen in QAD Adaptive ERP to create sites.

The site code identifies a specific warehouse or a group of buildings at the same physical location. The site code in the inventory detail record is a basic unit for inventory control and planning.

Sites are assigned to a specific GL entity and domain. Some programs, such as MRP, work vertically within single sites. Others, such as distribution requirements planning (DRP) and consolidated order processing, work horizontally across two or more sites and possibly two or more domains located in the same or different databases.

The system uses sites for inventory records, item costing, purchasing, sales quotations, sales orders, forecasting, master scheduling, MRP, and DRP. Not all programs operate by site. For example,

departments and work centers are not site specific.

For detailed information about setting up sites, see the *Master Data User Guide* in the [QAD Doc Library](#). For field definitions, see the Web UI online help.

For more details on Sites, see [QAD Initial Setup Training Guide](#).

## User, Employee, and Role Setup

This section shows how to properly set up PE roles to limit permissions depending on the desired scope of responsibility, how the shop floor users accounts are created, and how the user accounts are linked to a PE Role.

In addition to the implementation phase, the following are circumstances when you would set up PE roles:

- Hiring temporary/seasonal workers
- Hiring a new employee
- Vertical movement of the employee
- Increased levels of responsibility

The following programs are used to set up Roles, Users, and Employees in QAD Adaptive ERP:

- Roles
- Users
- User Access
- Business Relations
- Employees
- The Admin tab in QAD Production Execution

There are three main components to consider when setting up Roles and Security for PE in the QAD Production Execution: Roles, Employee IDs, and Users.

The first component is the role, which defines the permissions given within PE. It is important to consider all the necessary roles that are required by the customer because it is used to control the employee permissions and access throughout PE.

The second component is the Employee ID, which is used to create the actual PE user credentials that are used to log into PE, work centers, and various functions in PE.

The third component is the User ID, which is used to link the Employee ID to the role. The Employee ID is linked to the User ID and the User ID is linked to a specific role. This is how an employee in PE is assigned a certain role.

*Note:* Employee IDs do not consume ERP licenses the way that user IDs do within QAD Adaptive ERP.

The following are key benefits of using Users, Employees, and Roles:

- Enables you to define and link a limited number of user IDs, which decreases the amount of money spent on user IDs.
- Enables companies to easily assign roles to seasonal or temporary workers. Employee IDs are free and can be modified easily.

## Shop Floor Role Setup

A Role is a logical subset of activities that describes a user's business function or set of responsibilities within a business enterprise. You can define as many roles as required in the system in order to model your business processes. The common Roles to be used in PE are:

- **Shop Floor Administrator.** Responsible for PE setup and maintenance.
- **Shop Floor Operator.** The shop floor personnel responsible for actively producing work at the work center.
- **Shop Floor Supervisor.** Responsible for overseeing the work of operators at work centers.
- **Shop Floor Quality Inspector.** Responsible for performing quality control checks on finished products or production materials.
- **Shop Floor Maintenance Technician.** Responsible for performing maintenance on the production equipment.

Use the **Roles** screen in QAD Adaptive ERP to create roles. For detailed information about creating roles, see the *QAD Security Administration Guide* in the [QAD Doc Library](#). For field definitions, see the Web UI online help.

**Note:** You can define as many roles as required in the system in order to model your shop floor requirements.

The following table lists the recommended roles that should be created for PE:

Company Role	Role Name in PE
Operator	SFOperator
Administrator	SFAdmin
Supervisor	SFSupervisor
Technician	SFTechnician
Quality Inspector	SFQuality

**Note:** In PE, the Role name must start with SF (Shop Floor). This allows you to easily filter the relevant roles that are loaded into PE.

A Role can be referenced as many times as necessary by User IDs. When analyzing how to set up Roles, consider the various unique combinations of Role permissions that are needed in PE because shop floor permissions are utilized throughout many areas of PE. For example, consider which roles can access

specific PE Tabs, modify production orders statuses, trigger equipment down events, and so on.

Roles operate within the context of the domains and entities to which the user has been granted access. This is known as role membership.

## User Setup

User IDs are the “middle-man” connecting the Employee ID to the Roles.

Use the **Users** screen in QAD Adaptive ERP to create User IDs. For detailed information about creating users, see the *QAD Security Administration Guide* in the [QAD Doc Library](#). For field definitions, see the Web UI online help.

**Note:** Creating users may have financial implications for a customer; this activity should be completed by a system administrator.

The following table lists the generic shop floor User IDs that should be created:

User ID	Company Role
Oper1	Operator
Admin1	Administrator
Supv1	Supervisor
Qlty1	Quality Inspector
Tech1	Technician

## Assigning User Access by Domain/Entity

Use the **User Access** screen in QAD Adaptive ERP to configure user access to domains, entities, and sites, and to assign users to roles within the areas of QAD to which they have access.

For detailed information about assigning user access, see the *QAD Security Administration Guide* in the [QAD Doc Library](#). For field definitions, see the Administration > Security section in the Web UI online help.

## Associating Users to Roles

Role membership links users to roles, as well as the domains and entities in which that role operates.

Use the **User Access** > Roles grid in QAD Adaptive ERP to assign the user to the role. A single User ID can be assigned one or more PE roles.

When deciding how many User IDs are needed for the Production Execution, the customer should consider how many combinations of PE roles are required because for every unique combination of PE roles, an additional User ID is required.

**Note:** The User ID and role name cannot have the same ID. For example, if a customer wants a simple 1:1

relationship between User IDs and PE roles, they are required to create six total User IDs. The following table shows the PE user role setup for this use case as well as the suggested set up:

Company Role	User ID	Role Name in PE
Operator	Oper1, Oper2	SFOperator
Administrator	Admin1, Admin2	SFAdmin
Supervisor	Supv1, Supv2	SFSupervisor
Quality Inspector	Qlty1, Qlty2	SFQuality
Technician	Tech1, Tech2	SFTech

**Note:** The Employee ID is used to log into PE, not the User ID. This is beneficial because you are not required to generate more User IDs than is necessary.

For detailed information about assigning user access, see the *QAD Security Administration Guide* in the [QAD Doc Library](#). For field definitions, see the Web UI online help.

## Business Relation Setup

Use the **Business Relations** screen in QAD Adaptive ERP to create the entity that will be associated with an Employee ID. This is required before completing the setup of an Employee ID.

Business relations contain location and contact information for all addresses defined in the system. They also contain tax details that are directly referenced or used as defaults for customers and suppliers.

Business relations are defined at the database level. This lets you maintain all address data in one function, and then reference it in other functions that require address data, such as customer and supplier records. When the business relationship address data is modified, all other codes that reference that address are also updated automatically, reducing time and duplicate maintenance effort.

Each business relation code identifies a set of up to six system-defined address types that can be associated with different types of records in the system, from customers and suppliers to end users and docks. Some address types are used only in financial functions. These include reminder and remittance types. Others are used only in operational functions. These include ship-to, dock, and end user. The head office address is used in both financial and operational functions.

**Note:** The Business Relation is used to specify customers and suppliers; however for Production Execution it is important to indicate that the Employee entity is an internal relation.

**Note:** Entering the business relation address is required.

For detailed information about setting up business relations, see the *QAD Financials User Guide* in the [QAD Doc Library](#). For field definitions, see the Base Data section in the Web UI online help.

## Creating Employees and Associating to User IDs

Use the **Employees** screen in QAD Adaptive ERP to create an Employee ID and to associate it with the previously created Business Relation and a desired User ID.

There is no limit to the number of Employee IDs that can be created. This feature is beneficial because Employee IDs do not have a licensing fee associated with them. This is helpful for customers who periodically use seasonal or temporary workers.

For detailed information about creating Employee IDs, see the *QAD System Administration Guide* in the [QAD Doc Library](#). For field definitions, see the Base Data section in the Web UI online help.

To link an Employee ID to a User ID, select the User check box and then enter the User ID in the Login field. As stated previously, the User ID is linked to a Role, which determines the permissions the Employee ID will be given.

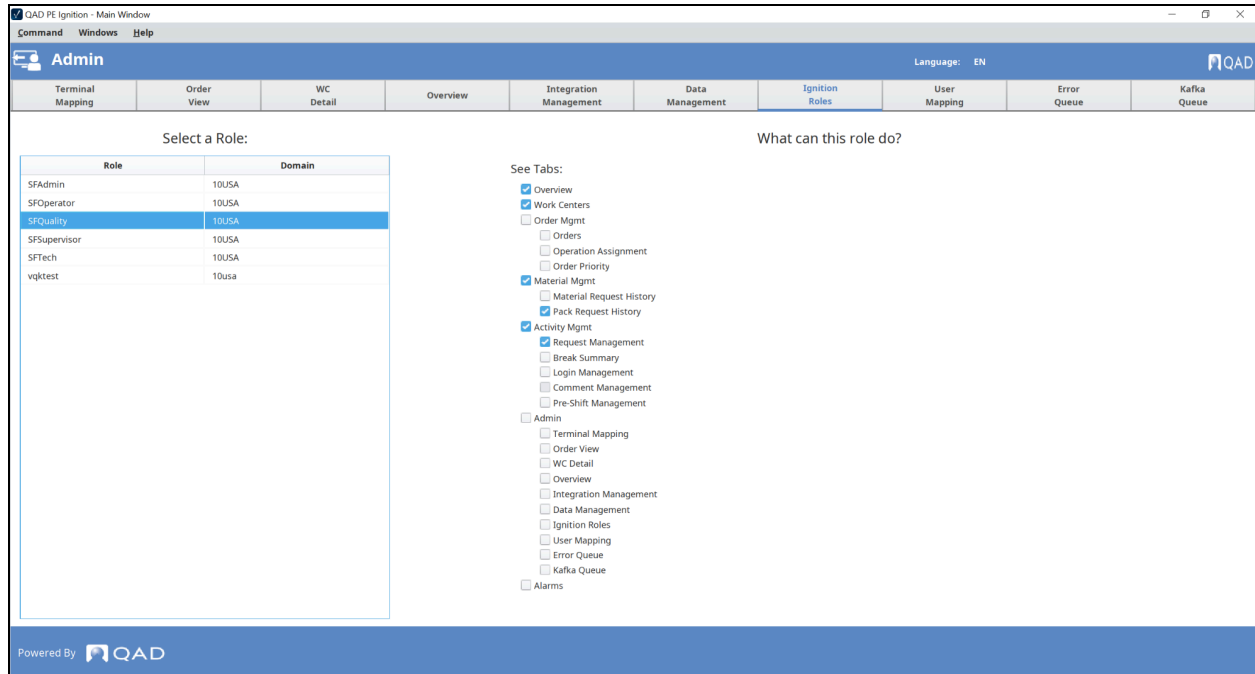
## Assigning Access to Production Execution Roles

Once the employee, user, and role data is imported into PE, the roles will be viewable in the Admin > Ignition Roles and Admin > User Mapping tabs. For information about importing role data into PE, see [Data Management](#).

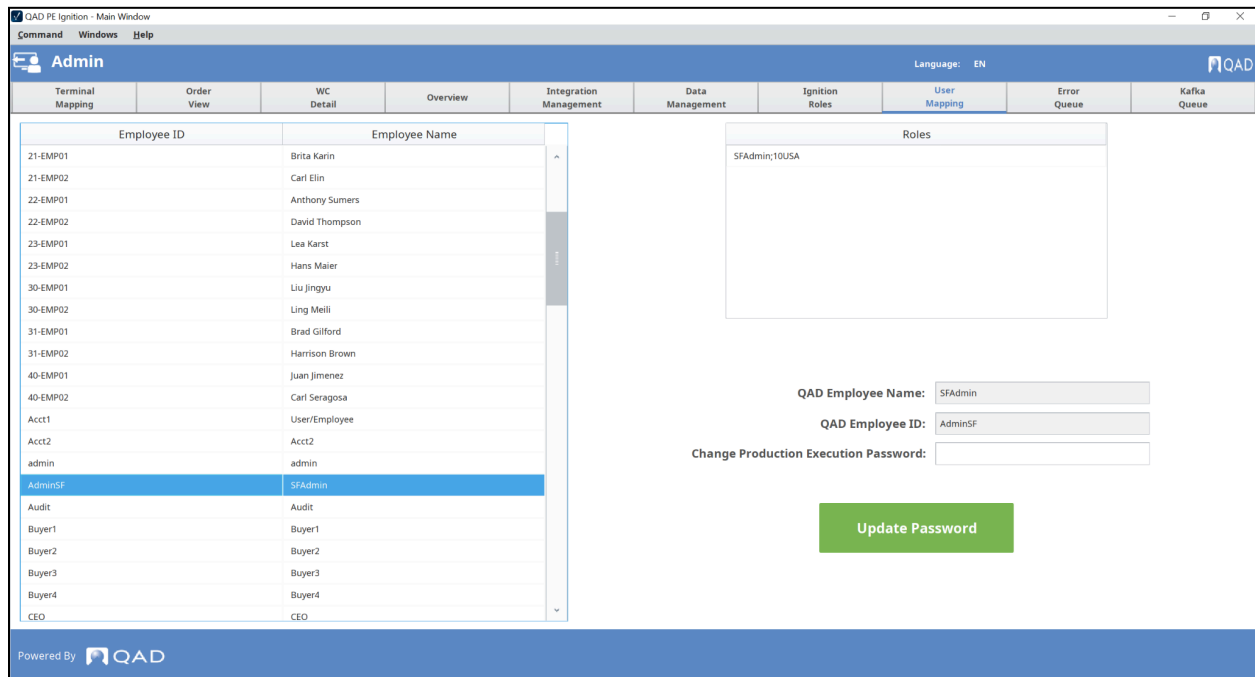
Use the Admin > Ignition Roles tab to determine the desired permissions for each PE role. The following table lists the recommended permissions for each PE role by showing the PE tabs that role has access to.

Company Role	Role Name in PE	Tab Access in PE
Operator	SFOperator	Work Centers
Administrator	SFAdmin	Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, Alarms
Supervisor	SFSupervisor	Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt
Quality Inspector	SFQuality	Overview, Activity Mgmt
Technician	SFTech	Overview, Activity Mgmt

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Use the Admin > User Mapping tab to view the PE employees and their assigned roles.



## Department Setup

A department is a group of similar work centers. Departments are like product lines because they are used to organize information on planning reports and to determine the GL accounts on transactions. Each department is set up with a fixed daily labor capacity and a set of GL accounts. For example, a manufacturer of sunglasses could have a department for lens fabrication with several work centers for lens grinding and lens polishing and a separate department for lens coating.

Use the **Departments** screen in QAD Adaptive ERP to create or modify departments. For detailed

information about creating departments, see the *QAD Production Orders User Guide* and the *QAD Manufacturing User Guide* in the [QAD Doc Library](#).

For field definitions, see the Manufacturing > Engineering > Production Resource Setup section in the Web UI online help.

## Work Center Setup

Work centers are the basic unit for operation scheduling and CRP. Depending on how you plan and schedule work, you can set up work centers for an individual machine or for groups of similar machines. If, for example, there are separate machines for polishing plastic lenses and polishing glass lenses, they would be set up as separate work centers. The system uses work centers for scheduling, planning, and determining costs for GL transactions.

Use the **Work Centers** screen in QAD Adaptive ERP to create or modify work centers. For detailed information about creating work centers, see the *QAD Production Orders User Guide* and the *QAD Manufacturing User Guide* in the [QAD Doc Library](#).

For field definitions, see the Manufacturing > Engineering > Production Resource Setup section in the Web UI online help.

## Production Line Setup

A production line is a sequence of work centers at a site, through which production can advance for the completion of manufacturing operations. Use the **Production Lines** screen in QAD Adaptive ERP to set up production lines.

For detailed information about creating production lines, see the *QAD Production Orders User Guide* in the [QAD Doc Library](#). For field definitions, see the Manufacturing > Engineering > Production Resource Setup section in the Web UI online help.

## Item Production Line Setup

Use **Item Production Lines** in QAD Adaptive ERP to set up a specific item for a specific production line. You specify the item, production line, and site. It is important that the BOM and routing codes match the items.

For detailed information about creating production lines, see the *QAD Production Orders User Guide* in the [QAD Doc Library](#). For field definitions, see the Manufacturing > Engineering > Production Resource Setup section in the Web UI online help.

When setting up an item on a production line, the following fields are specifically important when using Production Execution:

*Planning Units/Hour*. Enter the production rate for this specific item on the current production line. Ensure that the value is not zero, otherwise the production orders will not be sent to Production Execution.

### Line Allocation Panel

The Line Allocation panel enables you to set allocation percentages for the production lines on which an item could be manufactured. The system calculates the end date based on the period and period number.

**Note:** Make sure the Total Allocation Percentage is not zero, otherwise the production orders will not be sent to Production Execution

**Routing.** Enter a valid code that identifies the routing or process used to produce this item on this production line. Optionally, you can change it at this level, as required.

**BOM/Formula.** Enter a valid BOM code for the product structure or formula used with the routing or process to produce the item on this production line. Optionally, you can change it at this level, as required.

## Work Center Calendar Setup

The shop calendar is required for planning and manufacturing modules. The calendar indicates what days the plant is open and how many hours are worked each day. This information is used:

- To schedule start and due dates for MRP planned orders, master schedule orders, and work orders
- To schedule operations for work orders and repetitive schedules
- To schedule the procurement or shipment of materials through association with suppliers

Use **Work Center Calendar Maintenance** (14.18.1) in QAD .NET to define the default calendar for a specific work center, or work/center machine combination. Related programs are on the Work Center Calendar Menu (14.18). For detailed information about setting up work center calendars, see the *QAD System Administration Guide* in the [QAD Doc Library](#).

## Reason Code Setup

For information about setting up reason codes, see [Reason Code Functionality Setup](#).

## Enabling PE EDL (Electronic Dispatch List)

For QAD Production Execution, all production lines defined in QAD Adaptive ERP are “PE enabled”. This means that when the System Administrator uses the Get Data function in the Admin > Data Management tab, the PE database will be refreshed with all the updated production line data from QAD Adaptive ERP. The only requirement to enable PE EDL is to verify that a production line is specified on a production order when it is Released. When the production line is specified on the Released production order, the Production Line will default in for the Item and Site without requiring user entry. The screenshot below shows the link between the production order and the production line when it is released:

Production Order	2349243	02001	Automotive Connector	6/21/2010	1,000.0 EA
ID	2349243	Item	02001	Release Date	Quantity to Start
Main					
Production Order	2349243		Site	10-200	Automotive Mfg
ID	2349243	Order Type	C	Cumulative	
Item	02001	Manufacturing Type	Repetitive	Remarks	
Description 1	Automotive Connector				
Description 2					
Scheduling					
Production Line	2130	Stamping 1			
Order Date	2/6/2013		Quantity to Start	1,000.0 EA	
Release Date	6/21/2010		Quantity to Complete	0.0	
Due Date	7/10/2010		Estimated Yield Percent	100.00%	
Need Date	7/10/2010		Estimated Qty To Scrap	0.0	
Order Status	Released		Routing	02001	
Production Sequence	0.0		BOM/Formula	02001 Automotive Connector	
Shift					
Auto Schedule	<input checked="" type="checkbox"/>				
Actual					
Actual Qty Completed	0.0				

## Pack Code Setup

Pack codes help define the way items and inventory are stored to facilitate warehouse and logistics activities. You can create pack codes from the lowest-level pack up to the top-level pack, such as a small box, a large carton, a pallet, and shipping container.

Use the **Pack Codes** screen in QAD Adaptive ERP to create or modify pack codes. For detailed information about creating pack codes, see the *QAD Serialization User Guide* in the [QAD Doc Library](#). For field definitions, see the Web UI online help.

## Bill of Packaging (BOP) Setup

The BOP structure defines how many packing units are required for each level. You can define different packing types, such as a pallet, shipper, or cartons. You can also assign the UM and define the number of units of lower-level pack types that the top-level packaging type contains.

Use **Packaging Structures** in QAD Adaptive ERP to define a bill of packaging (BOP) structure. For detailed information about creating BOP structures, see the *QAD Serialization User Guide* in the [QAD Doc Library](#). For field definitions, see the Web UI online help.

## Item Packaging Setup

BOPs can be generic and you can reuse them for many items; or, they can be specific to an item or item BOM code. You can use different BOP codes for the same item when shipping to multiple partners that have slight variations in packaging requirements. You can assign packaging or BOP codes by item, partner, and more. You can assign them during receipt. For example, if you have different customers that require different packaging for the same item, you can use Item Packaging Assignments to specify which BOP to use for each customer. For more information, see Item Packaging Assignments.

Use the **Item Packaging Assignments** screen in QAD Adaptive ERP to link a bill of packaging (BOP) with items, sites, addresses, and transaction types. For detailed information about creating BOP structures, see the *QAD Serialization User Guide* in the [QAD Doc Library](#).

## Routings & Processes Setup

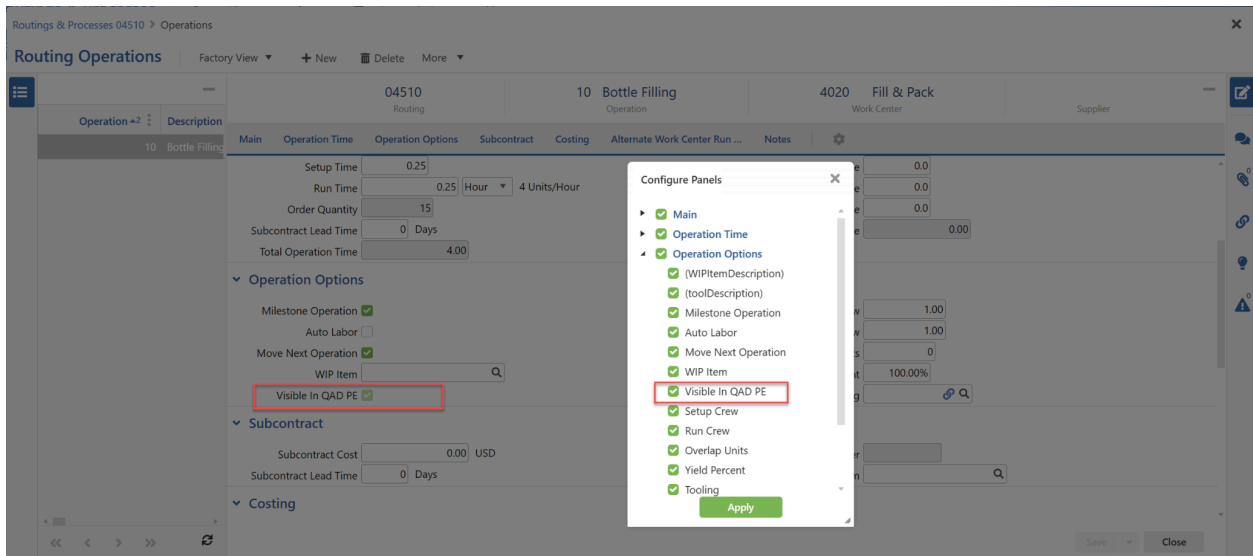
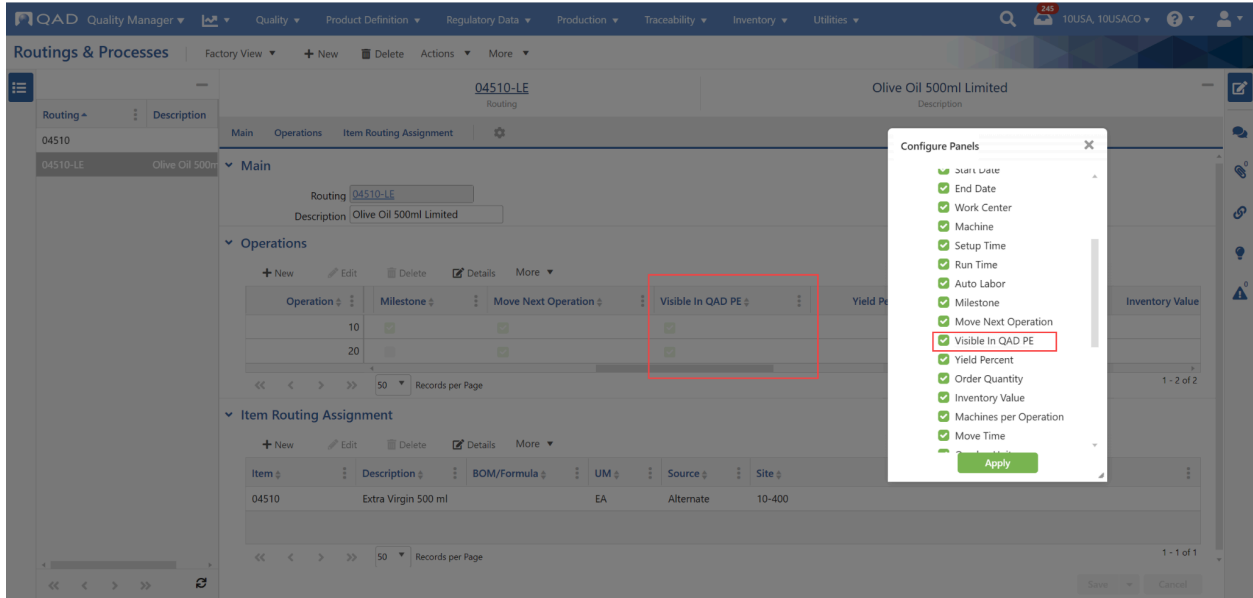
In the **Routings & Processes** screen in QAD Adaptive ERP, use the Visible in QAD PE checkbox to specify which routing operations are downloaded from QAD Adaptive ERP to PE. The system downloads all operations whose Visible In QAD PE field is selected, from QAD Adaptive ERP to PE.

**Note:** For milestone operations (Milestone = Yes), the Visible in QAD PE checkbox is automatically selected and is read only. For non-milestone operations (Milestone = No), the Visible in QAD PE checkbox is not selected but is editable. You must manually select the Visible in QAD PE checkbox for any non-milestone operations you want to be downloaded and visible in PE.

The Visible in QAD PE setting is useful if you need non-milestone operations to be visible in PE. If planners enter production order routing comments on non-milestone operations, the shop floor operators will be able to see them. When Visible In QAD PE is selected, production order routing comments are downloaded to PE and an icon appears by the production order. If the operator clicks on that icon, they can view the comments.

The screenshot displays the QAD Adaptive ERP interface for the 'Routings & Processes' screen. The main view is 'Factory View' for routing '04510-LE' (Olive Oil 500ml Limited). The 'Operations' section is expanded, showing a table with columns: Operation, Setup Time, Run Time, Auto Labor, Milestone, Move Next Operation, and Visible In QAD PE. The 'Visible In QAD PE' column contains checkboxes, with the first two rows having them checked. A red box highlights this column and the 'Milestone' and 'Move Next Operation' columns. Below the Operations grid is the 'Item Routing Assignment' section, which shows a table with columns: Item, Description, BOM/Formula, UM, Source, and Site. The first row shows item '04510' (Extra Virgin 500 ml) with UM 'EA', Source 'Alternate', and Site '10-400'. The interface includes a navigation menu on the left, a top navigation bar with various tabs, and a bottom bar with 'Save' and 'Cancel' buttons.

By default, the Visible In QAD PE checkbox is hidden in the factory view. To add this field to the Operations grid and the Routing Operations details screen, select the Gear icon and manually select the Visible in QAD PE checkbox.



## Configuring PE Screens in QAD Adaptive ERP

The following sections describe how to set up and configure QAD Production Execution using the PE specific screens in QAD Adaptive ERP. The screens covered in this section are only available if PE is installed.

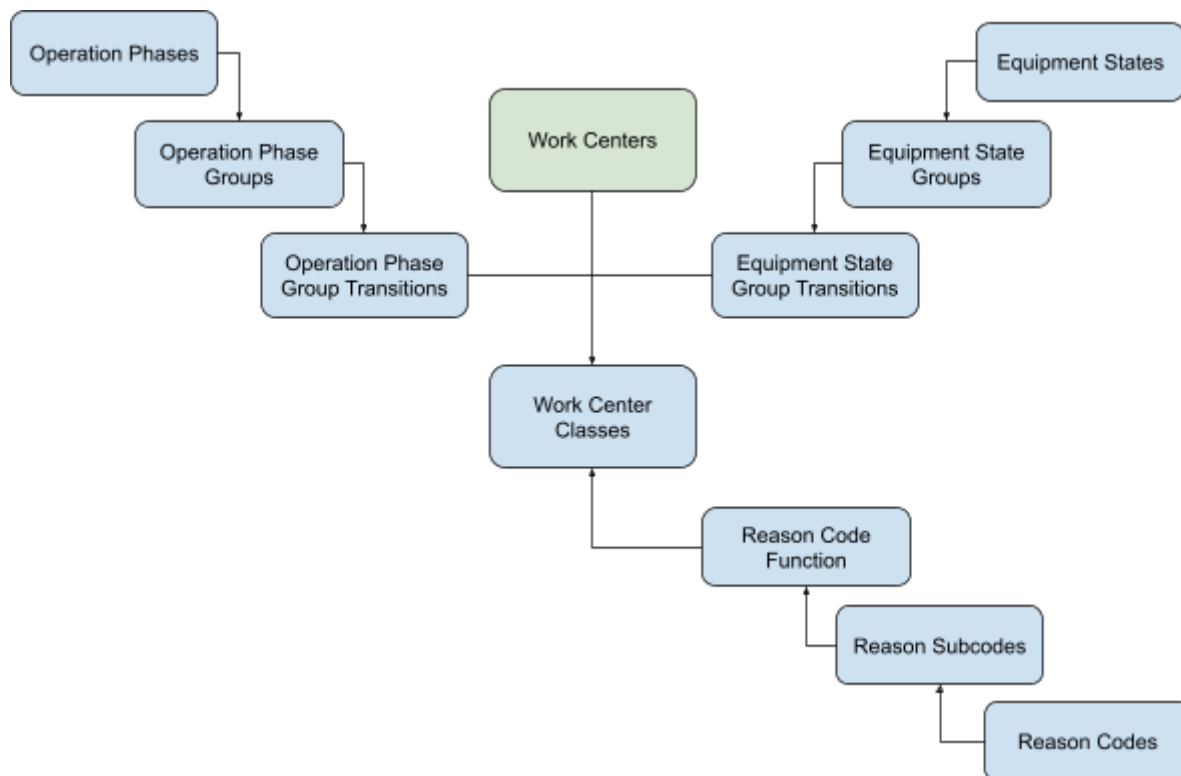
### Overview of Production Execution Screens Configuration

It is recommended that you set up the PE screens in QAD Adaptive ERP in the following order:

1. Equipment States
2. Equipment State Groups
3. Equipment State Group Transitions
4. Operation Phases
5. Operation Phase Groups

6. Phase Group Transitions
7. Check Sheets
8. Process Steps
9. Process
10. Reason Codes
11. Reason Code Function
12. Request Banners
13. Request Banner Alerts
14. Icons
15. Documents
16. Document Banner
17. Work Center Configurations
18. Work Center Class
19. Item Document Xrefs
20. Terminal Model Override
21. Production Options

**Note:** This list does not include the Production Execution Button screen because it seems to be an incomplete version of ObjectDefinition (SQL). For most customers, this table should be seed data. I've also left out API Message Configuration and API Settings. This seems like it would be seed data as well.



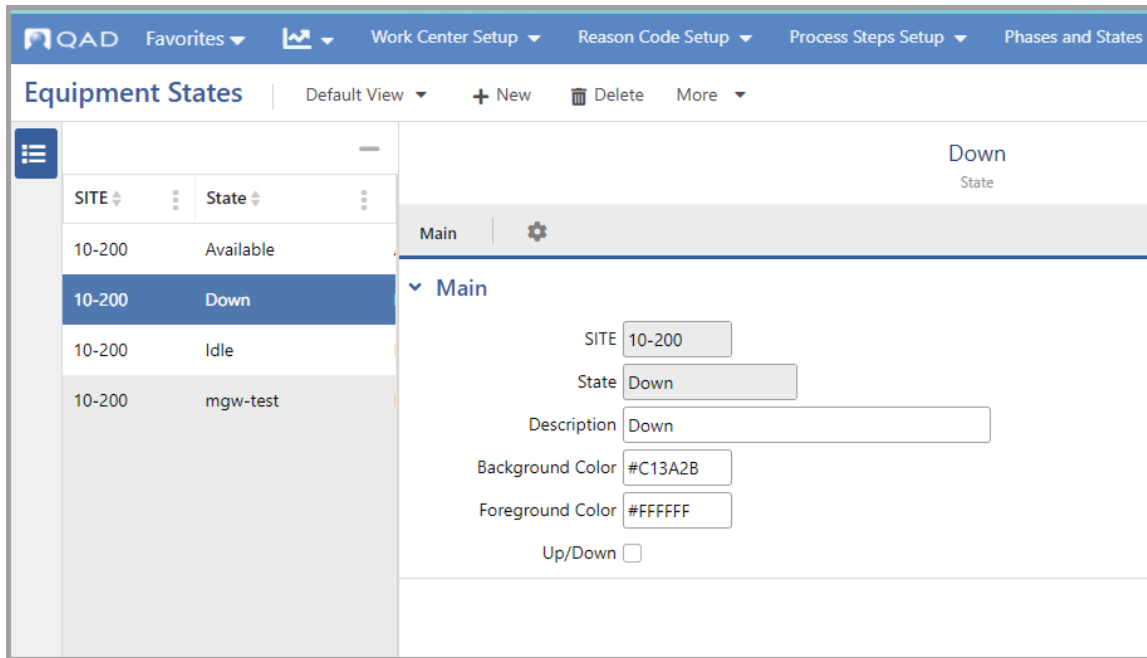
## Equipment States Setup

### Equipment States

Use **Equipment States** in QAD Adaptive ERP to create and manage the equipment states that are used in PE. Equipment states, which are user defined, indicate the status of a machine at a work center. Examples of equipment states are Available, Idle, or Down. When using **Equipment States**, you can:

- Specify the label that is displayed in PE.

- Specify the background and foreground colors that are displayed on the button when the equipment is in a specified state.
- Indicate if the equipment state is an Up (Running) or Down (Not Running) state.



The graphic below shows the equipment states buttons that are displayed in the Work Centers tab in PE.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1	2	2603240	50100 Molded Pin	35.0%	2	Production	Available	Supv1 (5)	0
5400-B Injection Molder 2				0.0%	0		Available		0
5400-C Injection Molder 3				0.0%	0		Available		0
5500-A Assembly Cell 1	2	2603239	00100 Pin Assembly - Star	0.0%	2	Paused	Available	Supv1 (2)	0
5500-B Assembly Cell 2				0.0%	0		Available		0
5900 Heat Treat				0.0%	0		Available		0

*Site.* Enter the site associated with the equipment.

*Domain.* The domain associated with the equipment.

*State.* Enter the equipment state, such as Available, Down, or Idle, which is displayed on the PE screen. Once this record is saved, this field is not editable. The State determines the text that is displayed on the equipment state button in PE.

*Description.* Enter a short description of the equipment state.

*Background Color.* Enter the Hex color code that you want to display in the background of the equipment state button. See [Color Code Reference](#) for a list of hex color codes.

*Foreground Color.* Enter the Hex color code that you want to display in the foreground of the equipment state button. The foreground is the text that is displayed on the button. See [Color Code Reference](#) for a list of hex color codes.

*Up/Down.* Select this check box if the equipment is up/running in this state. If the equipment is down/not running in this state, then do not select this check box. For example, if the state is Available or Idle this check box would be selected because the equipment would be up/running. If the state is Down, this check box would not be selected because the equipment would be down and not running.

## Equipment State Groups

An Equipment State Group is a collection of equipment states available to all the equipment associated with that group. Use **Equipment State Groups** in QAD Adaptive ERP to determine the sequence in which the equipment states can be changed. All work center classes **must** be assigned an Equipment State Group.

The screenshot displays the QAD Equipment State Groups configuration page. The top navigation bar includes 'QAD', 'Favorites', and various setup menus. The main header is 'Equipment State Groups' with options for 'Default View', '+ New', 'Delete', and 'More'. A sidebar on the left shows a tree view with '10-200' and 'GenState' selected. The main content area is divided into two sections: 'Panel' and 'Equipment State Group Detail'. The 'Panel' section contains input fields for 'SITE' (10-200), 'State Group' (GenState), 'Description' (Generic State Group), a 'Publish' checkbox (checked), and a 'Last Publish Date' field with a calendar icon. The 'Equipment State Group Detail' section features a table with columns for 'Sequence', 'State', 'Default', and 'Description'. The table lists three states: '1 Available' (Default checked), '2 Idle', and '3 Down'.

Sequence	State	Default	Description
1	Available	<input checked="" type="checkbox"/>	Available
2	Idle	<input type="checkbox"/>	Not in Use
3	Down	<input type="checkbox"/>	Not Available

*Site.* Enter the site to associate with the equipment state group. Once an equipment state group record is saved, this field is read only and not editable.

*State Group.* Enter a unique code identifying the equipment state group. This is displayed as an option in Work Center Class. Once an equipment state group record is saved, this field is read only and not editable.

*Description.* Enter a short description of the equipment state group.

*Publish.* This field is currently not functional.

*Last Publish Date.* This field is currently not functional.

**Equipment State Group Detail panel**

*Sequence.* This field is currently not functional. The sequence in which the equipment states are transitioned. It is recommended the sequences are numbered in multiples of 5 or 10 in case you need to add an equipment state later between two other states.

*State.* Enter the equipment state for the specified sequence in the equipment state group. The equipment state must exist in the system and have been set up in **Equipment States**.

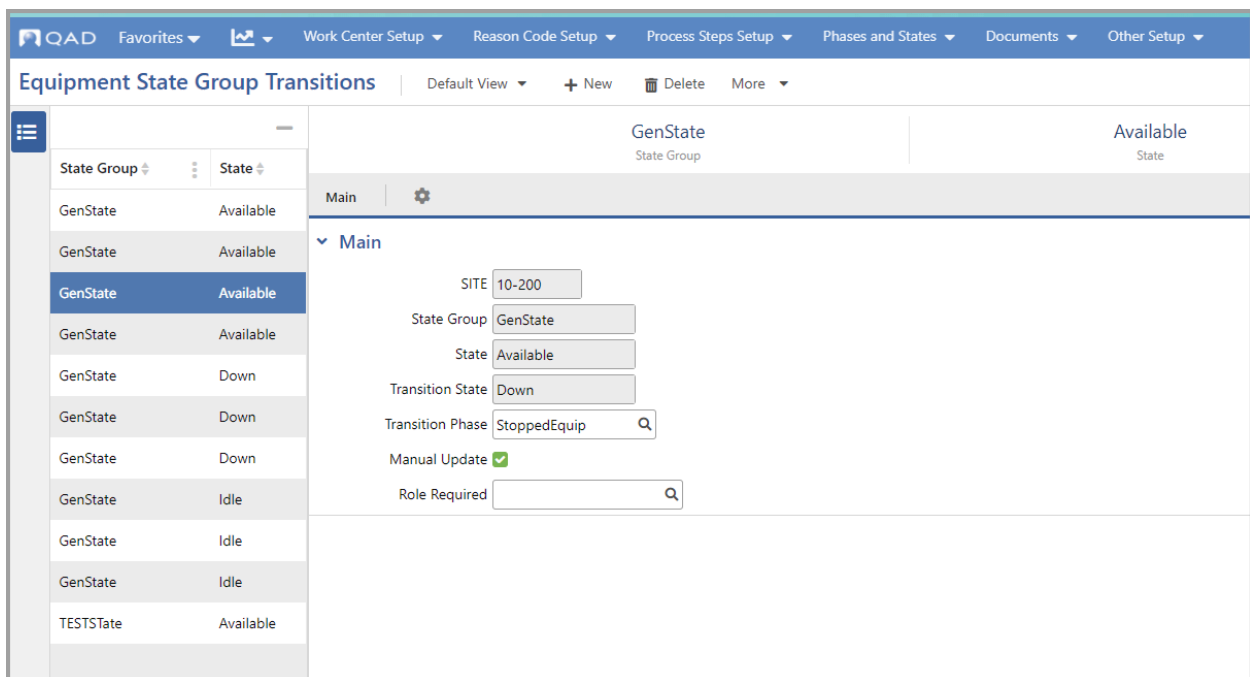
*Default.* Select this check box to specify the default equipment state, which is the state the equipment must be in for a production order to be released to it in PE. In most cases, the Available state is the default state.

*Description.* Displays the description of the equipment state.

**Equipment State Group Transitions**

The Equipment State Group Transitions defines how equipment states transition from one state to another state. It can change the operation phase of all orders when the from/to transition occurs. The operation phase can be applied automatically or manually. If necessary, you can mandate that a specific user role is required to make that particular transition happen, such as a supervisor. When the wrong role attempts the change, a supervisor override is required.

Use **Equipment State Group Transitions** in QAD Adaptive ERP to control the transitions of the equipment states by user role and operation phase. For example, you can determine that a machine can only be changed from an Available state to Down state if the machine is in a specific operation phase, such as Stopped. You can also determine the user roles who can make this change.



*Site.* Enter the site associated with the equipment state and equipment state group.

*State Group.* Enter the equipment state group for which you want to control state transitions. This is displayed as an option in Work Center Class.

*State.* Enter the “transition from” equipment state.

*Transition State.* Enter the “transition to” equipment state.

*Transition Phase.* Enter the operation phase that active orders in this state can be assigned, such as Paused or Down.

*Manual Update.* Select this checkbox if the system should prompt the user to change the Active order to the Transition phase. Clear this checkbox if PE should automatically change active orders to the Transition Phase.

*Role Required.* Optionally, enter the user role that can move the equipment to the Transition State.

## Operation Phase Setup

As production orders are released from QAD Adaptive ERP and created in PE, they are assigned an operation phase. The operation phase provides a status of the production order at a specific work center. All work centers in the routing have a record for the production order and are provided a default operation phase. For example, it is common to use Open as the default operation phase.

**Note:** Specifying a default operation phase is done in **Operation Phase Groups**.

The operation phase determines a variety of things within PE:

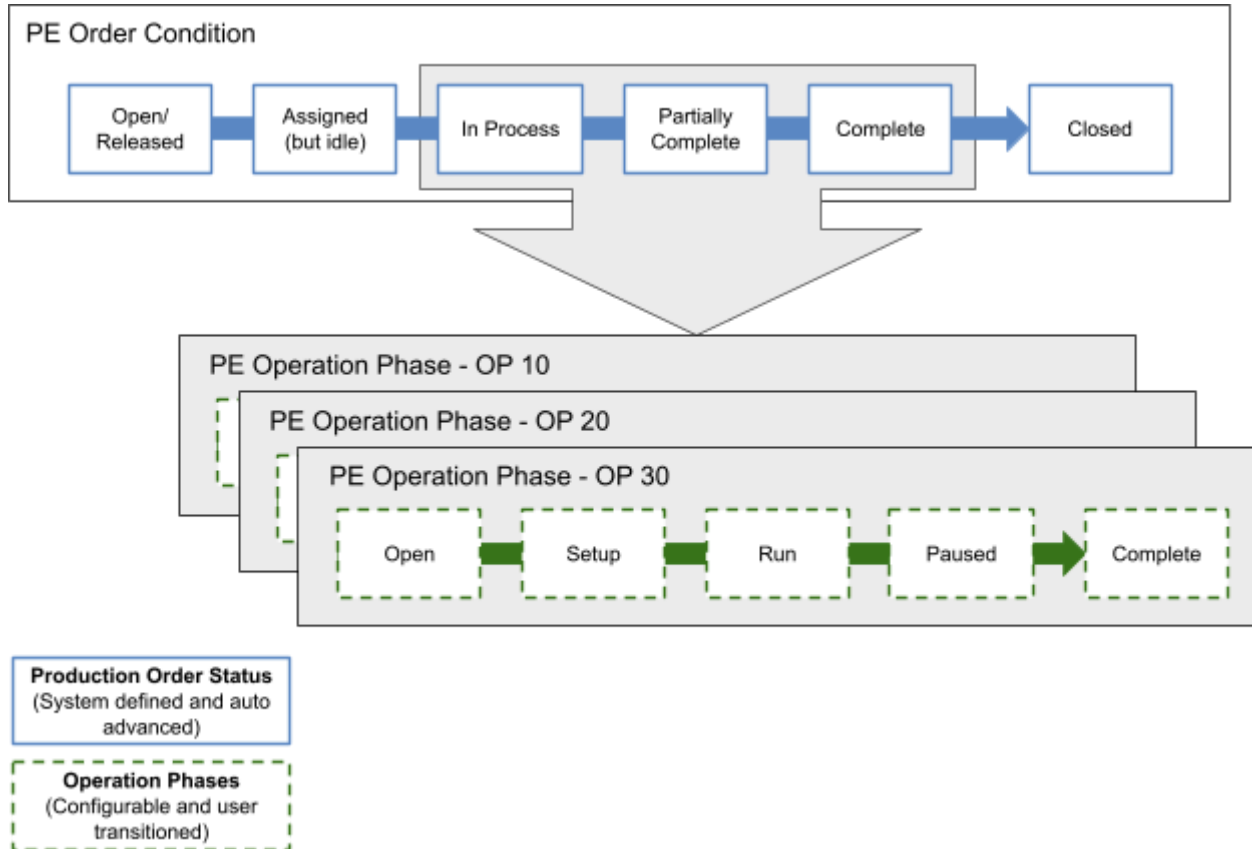
- Can production be reported?
- Should setup/run/down time be recorded?
- Can material be requested?
- Does it factor into performance calculations?
- Which tab does it appear under in PE?
- Can the order be reassigned to a new work center/machine?
- Should there be a stop/start button?
- Are there process steps for setup/production/teardown?
- Should there be a skill check performed?
- Should process timers be paused when going into the paused version of this phase?
- Should a reason code function be applied when this phase goes down?

Use **Operation Phases** in QAD Adaptive ERP to create and manage operation phases. In **Operation Phases**, you can:

- Add additional operation phases or change the phase labels that are displayed in PE.
- Specify the color of the operation phase button in PE so that users can quickly recognize the phase.
- Determine if material requests and production reporting are blocked in a specific phase. For example, you can block material requests and production reporting in the Complete phase.
- Determine if the operator can report production in the phase.
- Determine if the operation phase accrues run time, setup time, and/or down time and if the phase

is used in the calculation for performance to rate.

- Specify how production orders are filtered in PE work centers and whether they are displayed in the Active, Open, or Completed tabs.
- Determine if a production order can be moved to a different work center during the phase.
- Determine if the Start/Stop button is displayed in PE for the phase.
- Determine if setup, teardown, and/or production process steps are required during the phase.
- Determine if you want PE to check with the integrated Quality Management System to see if the operator is qualified to work at the work center during the phase.

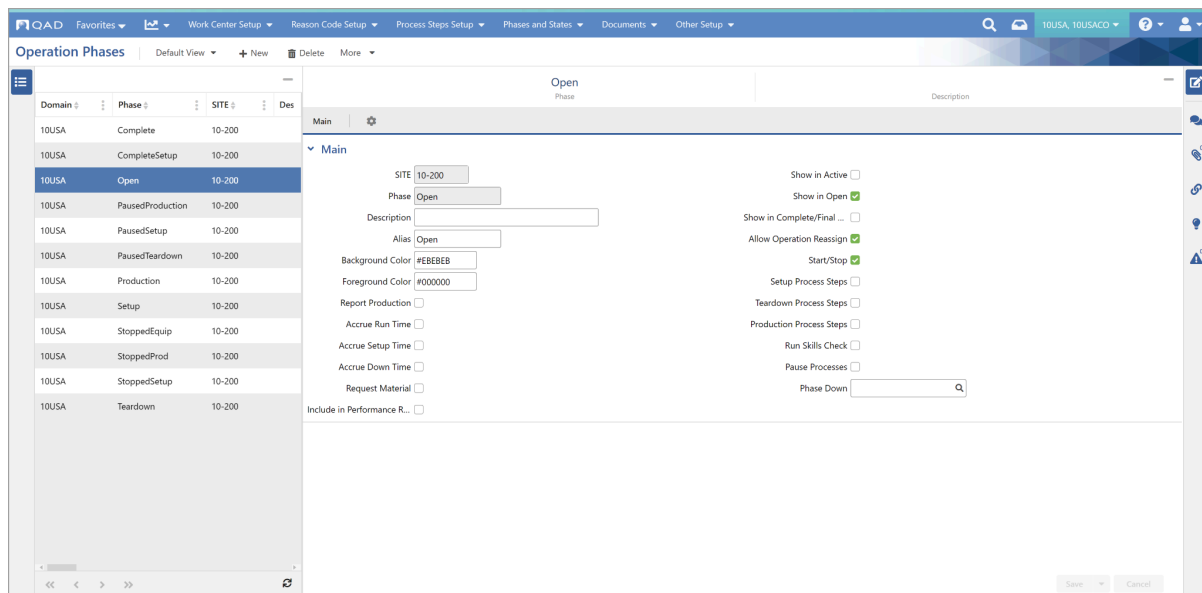


### Recommended Setup - Operation Phase Group

The following table lists the operation phases that are recommended to be set up. For additional information on colors and the associated hex codes, see [Color Code Reference](#).

Phase	Description	Recommended Color (Hex Code)
Open	During this phase, the production order has been released from QAD Adaptive ERP but no action has been taken against the order at the operation.	Light Gray (#808080)
Setup	During this phase, the equipment at this operation is being set up for the next production orders.	Light Purple (#CBC3E3)
Paused	During this phase, the user needs to pause production, which could pause labor accruing if necessary.	Yellow (#FFFF00)

Stopped	During this phase, the user needs to stop production, which could pause labor accruing if necessary.	Red (#FF0000)
Setup Completed	During this phase, the setup has been successfully completed and is ready to start production.	Dark Purple (#800080)
Production	During this phase, the production order is currently running at this work center.	Green (#00FF00)
Teardown	During this phase, all production is completed for this production order and the next upcoming production orders require a change of equipment changeover.	Orange (#FFA500)
Complete	During this phase, all work related to this production order is complete and the orders can be closed.	White (#FFFFFF)



*Site.* Enter the site to associate with this operation phase.

*Phase.* Enter the name of the operation phase which indicates the status of each specific routing step in the routing. Examples of operation phases include Open, Setup, Production, Paused, Stopped, Teardown, and Complete.

*Description.* Enter a short description of the operation phase.

*Alias.* Enter an alternate name of the operation phase that can be displayed to the operator. The Alias is useful when the Phase name is a code or an abbreviation because you can specify a reader friendly name in this field. For example, if the Phase is named “StopEquip” and the Alias is “Equipment Stopped”, the user will see “Equipment Stopped” on the PE screen.

*Background Color.* Enter the Hex color code that you want to display in the background of the operation phase button. For recommended colors to use in the background, see [Recommended Setup - Operation Phase Group](#).

*Foreground Color.* Enter the Hex color code that you want to display in the foreground of the phase button. The foreground is the text that is displayed. in the button. For readability, it is recommended you use black (#000000) or white (#FFFFFF) as the Foreground Color,

depending if the Background Color is light or dark. For a list of colors and their hex codes, see [Color Code Reference](#).

*Report Production.* Select this check box if the operator has the option to report production in this phase. When selected, the reporting pencil appears when an operation is in this phase and operators are able to report production. If this check box is not selected, the operator does not have the ability to report production in this phase.

*Accrue Run Time.* Select this check box if production/run time is tracked and accumulated in this phase. This option should only be selected once for each operation phase. There should be zero or one accrue flags selected per operation phase. Not all operation phases will accrue labor but those that do can only accrue one type of labor.

*Accrue Setup Time.* Select this check box if set up time is tracked and accumulated in this phase.

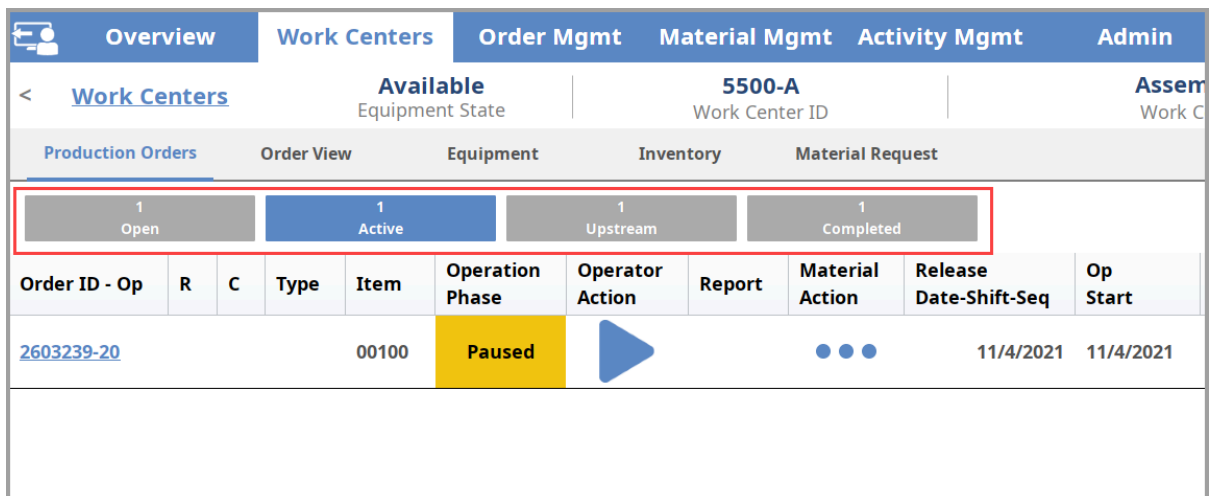
*Accrue Down Time.* Select this check box if down time is tracked and accumulated in this phase.

*Request Material.* Select this check box if the operator can request additional material or components from the Material Request screen during this operation phase.

*Include in Performance Rate.* Select this check box if the performance is calculated and compared against the standard rate during this operation phase.

**Show in Fields**

In PE, when viewing a specific work center in the Work Centers tab, users can filter the production orders at that work center by selecting the Open, Active, Upstream, and Completed tabs. Use the following “Show in” fields to specify if the production orders are displayed in the corresponding tab.



*Show in Active.* Select this check box if you want the production order at the work center to be displayed on the Active tab.

*Show in Open.* Select this check box if you want the production order to be displayed in the Open tab.

*Show in Complete/Final Phase.* Select this check box if you want the production order to be

displayed in the Complete filter tab.

*Allow Operation Reassign.* Select this check box to enable the production order to be moved to another work center in this phase. If selected and using 9999 machines on routings to allow shop floor scheduling, orders in this phase can be reassigned to a new work center/machine.

*Start/Stop.* Select this check box to display the Start/Stop icons on the PE screen in this phase.

*Setup Process Steps.* Select this check box if setup is required in this phase at the work center. When selected, a setup process is displayed in the Order view when an order is in this phase.

*Teardown Process Steps.* Select this check box if teardown is required in this phase at the work center. When selected, a teardown process is displayed in the Order view when an order is in this phase.

*Production Process Steps.* Select this check box if production process steps are required in this phase at the work center. When selected, the production process steps are displayed in the Order view when an order is in this phase.

*Run Skills Check.* Select this check box if you want PE to check with EQMS to see if the operator is qualified to work at the work center. This option should only be selected if you are using EQMS.

*Pause Processes.* If you are using paused phases in conjunction with operational phases, this option allows you to stop any process timers active in the operational version of the phase. For example, if you move an operation from Setup to PausedSetup, the timers for any active process steps will be paused. Select this option for the “paused version” of the operation phase, such as PausedSetup.

*Phase Down.* Select the Reason Code Function to assign to this phase. If there is a Reason Code Function assigned to this phase, the operator will have to select a reason code from the appropriate list when moving into this operation phase.

**Note:** If there is only one reason code linked to this Reason Code Function, PE auto-selects that reason code. If blank, a reason code is not required when moving into this phase.

## Operation Phase Groups

Use **Operation Phase Groups** in QAD Adaptive ERP to create and manage operation phase groups, which are groups of operation phases in a specified sequence.

When setting up operation phase groups, create groups that align with the work centers they are associated with. For example, if you have a work center that requires setup, create a phase group that includes setup type phases, such as Setup, Pause Setup, or Stop Setup. For work centers that do not require setup, you would create another group that does not include those setup phases.

Default	Sequence	Phase
<input type="checkbox"/>	5	Production
<input type="checkbox"/>	10	PausedProduction
<input type="checkbox"/>	15	StoppedEquip
<input type="checkbox"/>	20	Setup
<input type="checkbox"/>	25	PausedSetup
<input type="checkbox"/>	30	CompleteSetup
<input type="checkbox"/>	35	StoppedProd

*Site.* Enter the site to associate with the operation phase group. Once an operation phase group record is saved, this field is read only and not editable.

*Phase Group.* Enter a unique code identifying the operation phase group. The operation phase group is a group of operation phases in specified sequence. The Phase Group displays as an option in **Work Center Class**. Once an operation phase group record is saved, this field is read only and not editable.

*Description.* Enter a short description of the phase group.

### Phase Group Detail panel

*Default.* Select this check box to specify the default phase when an order is released. In most cases, the Open phase would be the default phase. Only one phase can be the default.

*Sequence.* Enter the sequence in which the orders are displayed on the PE screen. When viewing a PE screen that shows groups of orders, the orders are displayed in the sequence defined here. For example, if Open orders are Sequence #1 and Setup orders are Sequence #2, all Open orders are displayed first and Setup orders are displayed second.

**Note:** It is recommended the sequences are numbered in multiples of 5 or 10 in case you need to add an operation phase later between two other phases.

*Phase.* Enter the operation phase for the specified sequence in the operation phase group. The operation phase must exist in the system and have been set up in **Operation Phases**.

## Phase Group Transitions

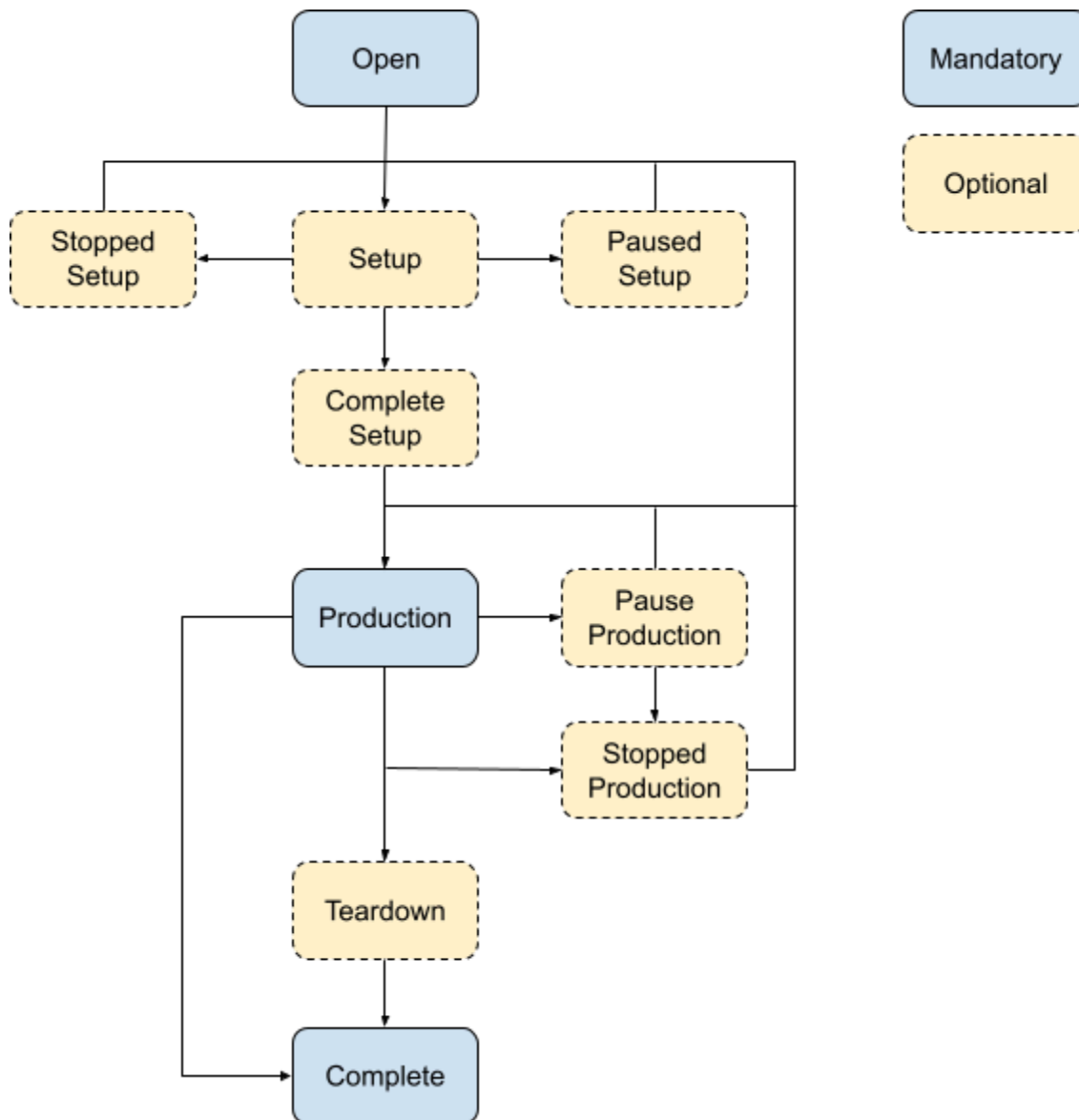
Use **Phase Group Transitions** in QAD Adaptive ERP to control the flow of operation phases in an operation phase group. When using **Phase Group Transitions**, you determine the transition from and transition to phase and if the transition is performed by a specific user role.

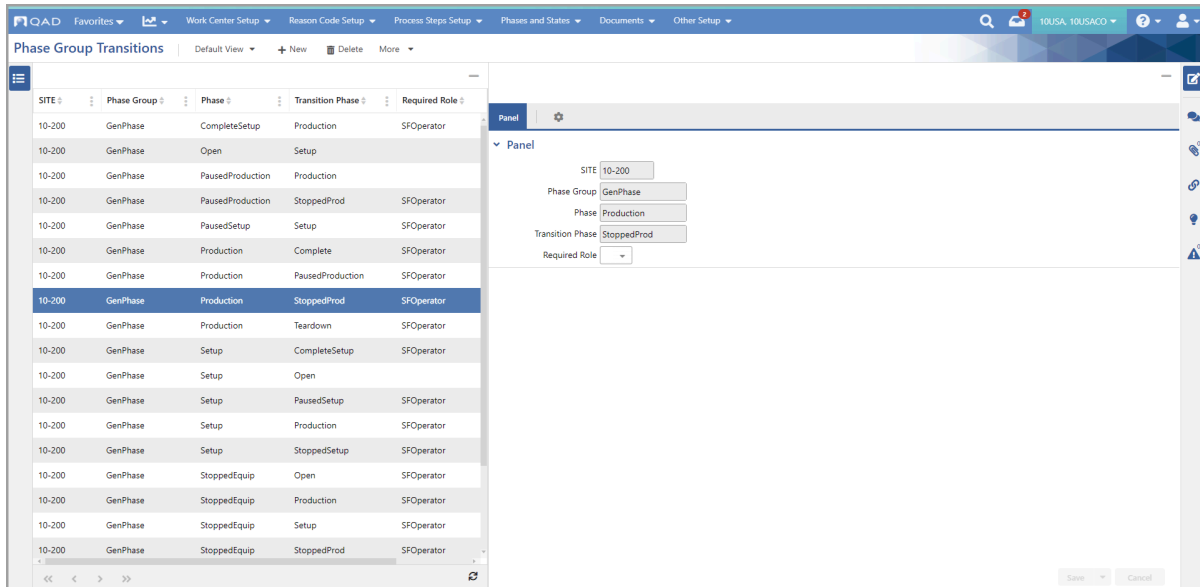
When setting up the phase group transitions, you define the acceptable from/to transition combinations. When you are changing from an operational phase, PE contextually displays the available options based on the transitions.

**Note:** If you set up operation phases and operation phase groups but do not set up phase group

transitions, it can cause orders to become stranded where they cannot be moved to a new phase. This can also occur if you do not assign the phase group transition to a work center class. If there is no phase group transition defined, production orders can be locked in the specific state because there is no phase for it to be transitioned to. For example, production orders can become stranded in the Setup phase if you do not define transitions for that specific phase. If there is no transition defined for the Setup phase, then when the order is moved into this phase, PE will not be able to find the transition that moves the order out of that phase and it will become stranded.

The following graphic shows an example of how operation phases may flow. Using the example below, you could determine that if a work center is in a Stopped Production phase, only a supervisor role can transition it to a Production phase.





*Site.* Enter the site associated with the operation phase group transition.

*Phase Group.* Enter the operation phase group for which you want to control phase transitions.

*Phase.* Enter the “transition from” operation phase.

*Transition Phase.* Enter the “transition to” operation phase.

*Required Role.* Enter the user role that can move a production order from the Phase to the Transition Phase.

## Check Sheets

Use **Check Sheets** in QAD Adaptive ERP to create a list of tasks to be processed by a user.

Check sheets are a list of things to evaluate and confirm when logging into a work center. For example, a check sheet could consist of a list of things you should do when starting your work day at a work center.

You can also create Process check sheets, which are lists of tasks to be performed as part of a setup, production, or teardown process at a work center and job. Process check sheets are typically job related.

You can also create Login check sheets that can be assigned to particular roles and contain tasks specific to that role.

Sequence	Instruction	Mandatory	Role Override
1	Is your work station ...	<input type="checkbox"/>	
2	Are all tools needed...	<input type="checkbox"/>	
3	Does the power work	<input type="checkbox"/>	

*Check Sheet.* Enter the name of the check sheet.

*Description.* Enter a short description of the check sheet.

*Role.* If the check sheet applies to a specific role, enter that role, such as Operator. When the specified user logs into a work center, they will be presented with the check sheet.

**Note:** This field does not apply to process check sheets.

### Check Sheet Detail Panel

*Sequence.* Enter the order in which the check sheet instructions appear.

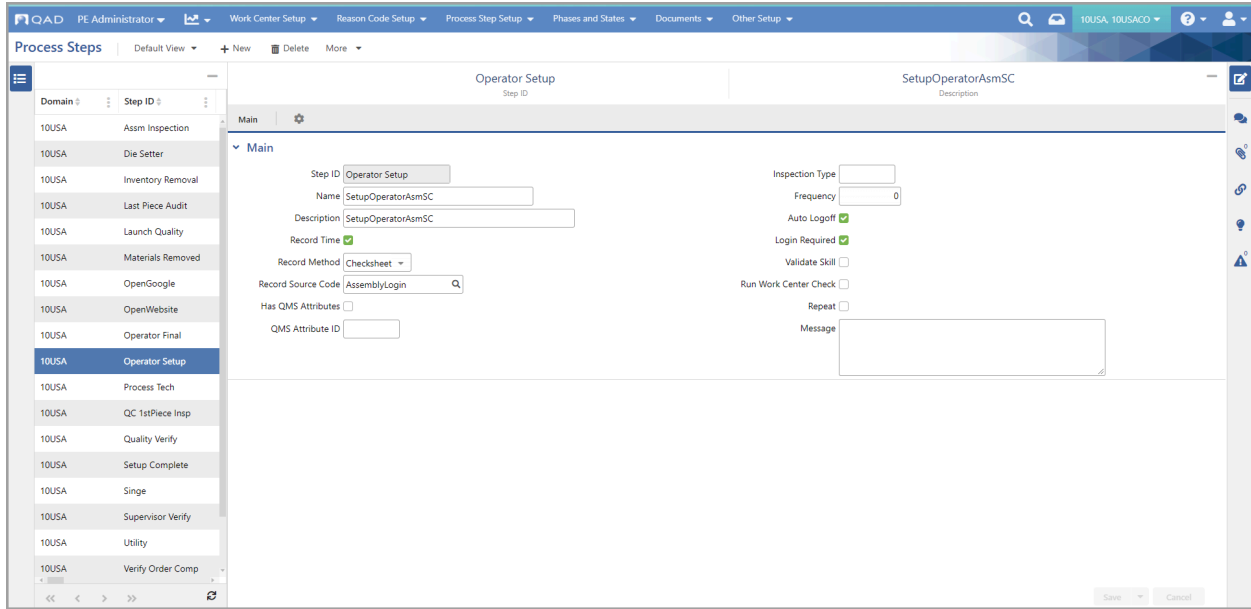
*Instruction.* Enter the detailed task/reminder info that is presented as part of the check sheet.

*Mandatory.* Select this check box if this instruction step is mandatory. When selected, this instruction must be answered by the user in the affirmative.

*Role Override.* When an instruction is not answered or is answered in the negative, the user specified here can override the incomplete check sheet and finalize its completion.

## Process Step Setup

Use **Process Steps** in QAD Adaptive ERP to create a library of activities that can be combined to form processes. When setting up process steps, you can define the different categories of activities by setting the Record Method. If you are using EQMS, you can specify that a process step requires training validation before the user will be permitted to work there.



*Step ID.* Enter a unique name for the process step. The Step ID is displayed in the browses for setting up processes and on PE's Order View tab in the process view.

*Name.* Enter the name of the process step. For example, if you entered an abbreviation or a code for the Step ID, you could enter the full name of the process step in this field.

*Description.* Enter a short description of the process step. This is not displayed in PE.

*Record Time.* Select this check box so that the system creates a timestamp when the operator begins and ends the process step. When selected, PE records the time for this process step.

*Record Method.* Specify the record method, which serves as the process step category:

Record Method	Description	Record Source
Attributes	For process style attributes, this links the attributes to the process.	ID of the process to be used
Automaterial	For requesting material for an operation.	NA
Checksheet	For incorporating checksheets into the process.	NA
Inventory		
Open Website	For process steps where you want a specific website to open.	
Shared Template		

*Record Source Code.* If the Record Method is set to Checksheet or Attributes, specify the source file that opens when the operator performs this step. For example, if the Record Method is set to Check Sheet, select the check sheet that opens for the operator.

*Has QMS Attributes.* This field is not currently used.

*QMS Attribute ID.* This field is not currently used.

*Inspection Type.* This field is not currently used.

*Frequency.* Enter how often (in seconds) the step should be performed.

*Auto Logoff.* Select this checkbox if you want PE to log off the user when the process step is complete.

*Login Required.* Select this check box if the operator must log in to process this step.

*Validate Skill.* Select this check box if you want PE to check with EQMS to see if the operator is qualified to perform this process step.

*Run Work Center Check.* Select this check box if you want PE to check with EQMS to see if the operator is qualified to work at the work center.

*Repeat.* Select this check box if the process step repeats; for example, a process step for an hourly inspection. When selected, the frequency in which the process step repeats is determined by the Frequency field.

*Message.* If the Record Method is set to Open Website, enter the URL that PE opens.

## Process Setup

Use the **Process** screen in QAD Adaptive ERP to create processes that define the detailed steps that are performed at a specific operation/work center. Processes are different from Routing steps in QAD Adaptive ERP. Processes are more detailed and apply to a specific work center while Routing steps are high level references to work being performed to produce a subassembly or finished product.

In the **Process** screen, you can create processes for different roles in the company. For example, you can create a process for an operator who records setup readings from equipment, enters production details in a separate website, or various other operator related tasks. You can also create a process for a quality technician who needs to perform inspection on the first piece from production or for a service technician who needs to record a tool serial or confirm the settings on a critical piece of equipment.

The screenshot shows the QAD PE Administrator interface for configuring a process. The top navigation bar includes 'PE Administrator', 'Work Center Setup', 'Reason Code Setup', 'Process Step Setup', 'Phases and States', 'Documents', and 'Other Setup'. The main window title is 'Process' and the current process is 'HS Assm setup'. The left pane shows a list of processes under the '10USA' domain, with 'HS Assm setup' selected. The main panel is divided into two sections: 'Main' and 'Process Detail'.

**Main Section:**

- Process: HS Assm setup
- Description: Assm setup
- TYPE: Setup
- Phase Upon Completion: (empty field)

**Process Detail Section:**

Sequence	Operation	Item	Mandatory	Prior Sequence	Request Type	Step
1	10	H50100	<input checked="" type="checkbox"/>	0		HS Setup
2	10	H50100	<input checked="" type="checkbox"/>	1		HS FPI

## Main Panel

*Process.* Enter a unique name for the process. The name entered is displayed in the PE browses.

*Description.* Enter a short description of the process. This is not displayed in PE.

*Type.* Enter the operation phase to associate with this process; options include:

- Setup
- Production
- Teardown

*Phase Upon Completion.* Optionally, you can force an order to a new operation phase when all steps in the process are successfully completed. Enter the operation phase the order is moved to when all the steps in the process are completed.

## Process Detail Panel

*Sequence.* The sequence in which the steps appear in this process.

*Operation.* If this process step applies to a specific operation, enter the operation in this field. If it does not apply to a specific operation, enter an asterisk (\*).

*Item.* If this process step applies to a specific item, enter the item in this field. If it does not apply to a specific item, enter an asterisk (\*).

*Mandatory.* Select this check box if it is mandatory that this step is processed. When selected, a supervisor can override this setting and allow the operator to skip the step.

*Prior Sequence.* If there is a specific step, which is mandatory and precedes this step, enter the sequence number in this field. If necessary, you can enter multiple sequence numbers by separating each number by a comma (,).

*Request Type.* If this step triggers something in the alert banner, enter that Request Type here; for example, Material, Supervisor or Quality.

## Reason Code Functionality Setup

Reason codes are used in a lot of functions, including security functions, sales quotes, sales order maintenance, purchase order returns, shop floor reporting, repetitive reporting, and the Product Change Control (PCC) module. They are useful because they can be associated with a transaction or event in order to categorize or describe it. Using the correct reason code ensures consistent reporting and tracking across a company.

In QAD Production Execution, reason codes are designed to be used contextually so that certain reason codes can be selected when and where certain activities are performed. For example, when a user wants to scrap material at a certain work center, that user would only be able to select reason codes associated with that machine and that activity. When setting up reason codes, you should consider the specific machines and work centers where users will be entering the reason code data.

### Reason Subcodes

QAD Production Execution provides additional functionality to the **Reason Codes** screen by adding the Reason Sub Codes panel. Reason subcodes extend the standard reason codes found in QAD Adaptive ERP to allow users to:

- Capture reason code information in deeper granularity than what is provided in QAD Adaptive ERP
- Group similar reason codes together

**Note:** Analysis of Reason subcodes can be done using `asevent_mstr` table and in Cassandra. Transactions sent back to QAD Adaptive ERP (reject/rework/scrap) only use the higher level codes defined in QAD Adaptive ERP.

Reason subcodes provide more detailed reasons when tracking reject, scrap, rework, or downtime transactions. For example, a transaction in QAD Adaptive ERP that uses standard reason codes might only report that a part was rejected because of the Finish. In PE, using reason codes and subcodes in the same transaction allows you to identify in greater detail the specific problem that was at fault with the Finish, such as a blemish, a scratch, or a rough surface. The table below lists examples of different subcodes that can be associated with the Finish reason code:

Reason Type	Reason Code	Subcode	Description
Rework	Finish	FRW04	Mechanical Adjustments
Reject	Finish	FI01	Blemishes
Reject	Finish	FI02	Rough Surface
Reject	Finish	FI03	Scratches
Scrap	Finish	FI04	Blemishes
Scrap	Finish	FI05	Rough Surface
Scrap	Finish	FI06	Scratches

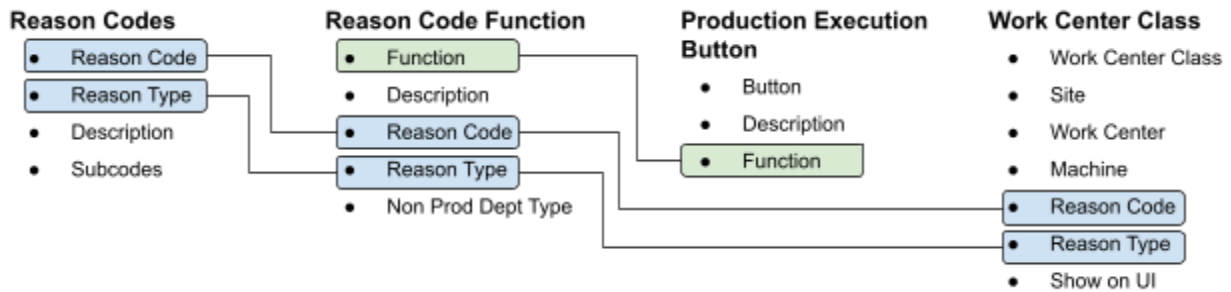
After capturing the detailed reject reasons, managers can then use that data to easily and quickly

troubleshoot production problems. If there is a sudden increase in rejected parts because of scratches, technicians will be able to quickly identify and fix any production processes that might be causing the scratches.

### Reason Code Setup Process

Use the following screens to properly set up reason codes functionality with the correct links:

1. **Reason Codes.** Use this screen to set up the reason code and the reason sub code.
2. **Reason Code Function.** Use this screen to create the reason code function and associate it with the reason code. The reason code function serves as the link between the Production Execution Button and the Reason Codes and Subcodes that are displayed when the PE button is selected.
3. **Production Execution Button.** Use this screen to create a PE button that links to a specific reason code function. These records are created automatically during installation and it is not required to set these up manually.
4. **Work Center Class.** Use this screen to specify which reason codes are displayed at a specific work center. The Reason Types and Reason Codes must be linked to work center/machines through the work center class.



### MariaDB Tables Used with Reason Code Functionality

The following table lists the MariaDB tables used when setting up and processing reason codes and subcodes.

Table	Table Type	Description
ObjectDefinition	Setup	Links buttons on PE screens to the ReasonCodeFunctions table.
ReasonSubcodes	Setup	Extends QAD Adaptive ERP reason codes to include subcodes.
ReasonCodeFunctions	Setup	Represents types of activities in PE screens and links reason types and reason codes to be used in those activities.
ReasonCodeWorkcenter	Setup	Indicates which reason types and reason codes can be used with a work center class.
OperationPhases	Setup	Allows linking reason types and reason codes to specific operation phases, if the need is to provide a reason for changing the phase.

InventoryRequest	Transaction Record	Logs inventory requests and their reasons.
NonProductiveLabor	Transaction Record	Logs non-productive labor and their reasons.
OperatorComments	Transaction Record	Logs operator comments and their comment types.
EventLog	Transaction Record	Logs all events in PE and reason codes if applicable.

## Reason Codes

Use **Reason Codes** in QAD Adaptive ERP to create and manage reason codes and subcodes.

SubCode	SITE	Visible	Description
C001	10-200	<input checked="" type="checkbox"/>	Component shortage
C002	10-200	<input checked="" type="checkbox"/>	Incorrect component
C003	10-200	<input checked="" type="checkbox"/>	Component quality
C004	10-200	<input checked="" type="checkbox"/>	Insufficient documentation

**Reason Type.** Enter the standard QAD Adaptive ERP reason type for this reason code. Reason types group similar reason codes for easy access in other modules. The system uses several special reason types. You can define other reason types as needed. Each reason code is associated with a reason type.

**Note:** DownTime, Down, Scrap, Reject, and Rework are standard reason code types provided with QAD Adaptive ERP.

**Reason.** Enter the standard QAD Adaptive ERP reason code to associate with the specified reason type. Reason codes identify and categorize activities by reason; for example, sales lost because of price, downtime and rejects caused by machine failure, or user account deactivated because the user left the company.

Several reports and inquiries are available to review transactions by reason code.

**Description.** Enter a short description of the reason code. If using subcodes, the description might describe the specific category of reason codes.

### Reason Sub Codes Panel

Use this panel to associate a reason code with a reason subcode. Select New to add a new line to the grid. If necessary, you can enter multiple reason subcodes.

*Sub Code.* Enter a reason subcode to associate with the main reason code.

*Site.* Enter a site to associate with the reason subcode and main reason code combination. If necessary, you can enter an asterisk wildcard character.

*Visible.* Select this check box to display the reason subcode to the user in PE. If this check box is not selected, the subcode will not be displayed. For example, this checkbox would not be selected if the user is not required to select this subcode during a production activity because the subcode is maintained and imported from a PLC.

*Description.* Enter a short description of the reason subcode.

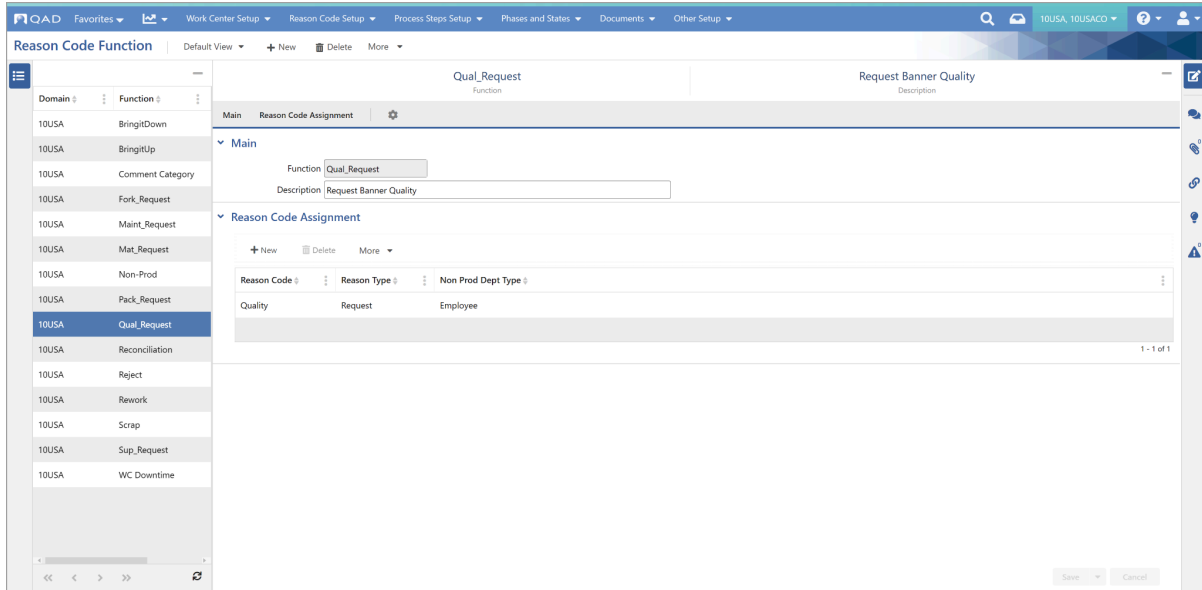
For more information about setting up reason codes, see [Reason Codes Setup](#).

SubCode	SITE	Visible	Description
FI01	10-200	<input checked="" type="checkbox"/>	Blemishes
FI02	10-200	<input checked="" type="checkbox"/>	Rough surface
FI03	10-200	<input checked="" type="checkbox"/>	Scratches

## Reason Code Function

Use **Reason Code Function** in QAD Adaptive ERP to create the reason code function and associate it with the reason code. The reason code function serves as the link between the Production Execution Button and the Reason Codes and Subcodes that are displayed when the appropriate PE button is selected.

**Note:** Reason code function data is automatically created when you install PE. It is unlikely a user will need to modify the data in the Reason Code Function screen.



The following table lists reason code functions that can be set up along with their associated reason code types and reason codes.

Reason Code Function	Reason Code Type	Assigned Reason Codes
BringItDown	DownTime*	Equipment down reason codes
BringItUp	Uptime	Equipment up reason codes
Comment_Category	PE-CMT	Classification of different types of comments
Maint_Request	Request	Maintenance request reason codes
Mat_Request	Request	Material request reason codes
Non-Prod	Down*	Types of non-productive labor
Qual_Request	Request	Quality technician request reason codes
Reconciliation	Recon	Adjusting production order quantity reason codes
Reject	Reject*	Production reject reason codes
Rework	Rework*	Production rework reason codes
Scrap	Scrap*	Production scrap reason codes
Sup_Request	Request	Supervisor request reason codes

\*The DownTime, Down, Scrap, Reject, and Rework are associated with standard reason codes provided with QAD Adaptive ERP. The Reason Type must be Down, Downtime, Reject, Rework or Scrap to maintain compatibility with QAD Adaptive ERP.

*Function.* Enter a unique code to associate to the reason code function. For example, if the function is for material scrapping, you could enter Scrap. If the function is associated with a general downtime activity, you could enter Non-Prod.

The reason code function serves as the link between the Production Execution Button and the Reason Codes and Subcodes that are displayed when the appropriate PE button is selected.

*Description.* Enter a description of the reason code function.

### Reason Code Assignment panel

Use this panel to link a reason code to a reason code function. Select New to add a new line to the grid.

*Reason Code.* Enter the reason code to associate to the reason code function. This reason code must exist and have been previously set up in Reason Codes. If necessary, you can enter an asterisk wildcard character.

*Reason Type.* Enter the reason code type to associate with the reason code. Reason Type must be Down, Downtime, Reject, Rework or Scrap to maintain compatibility with QAD Adaptive ERP.

*Non Prod Dept Type.* If you are reporting non-productive labor, select from the following to determine the department to use when reporting the labor:

- **Generic.** Select Generic if you are using the default department value set up using the production option “NonProdReason.”
- **Employee.** Select Employee if you are using the department that defaults from the employee record.
- **Work Center.** Select Work Center if you are using the department that defaults from the work center.

## Production Execution Button

Use **Production Execution Button** in QAD Adaptive ERP to create and manage PE buttons that link to a specific reason code function.

The screenshot shows the QAD PE Administrator interface. The top navigation bar includes: QAD PE Administrator, Work Center Setup, Reason Code Setup, Process Step Setup, Phases and States, Documents, and Other Setup. The main title is "Production Execution Button" with options for "Default View", "+ New", "Delete", and "More".

On the left, there is a table of buttons:

Button	Domain	Description
B001	10USA	Report - Rework
B002	10USA	Report - Suspect/Re...
<b>B003</b>	10USA	<b>Report - Scrap</b>
B004	10USA	Material Request Re...
B005	10USA	Action - Scrap Mate...
B008	10USA	Supervisor Request
B009	10USA	Quality Request
B010	10USA	Fork Truck Request
B011	10USA	Material Request

The right side of the screen shows the detailed view for button B003. The title is "B003 Button". Under the "Main" tab, there are three input fields:

- Button: B003
- Description: Report - Scrap
- Function: Scrap

## Reason Code Setup - Use Cases

### Comment Type Reason Codes

In addition to selecting a predefined list of reason codes, PE allows users to add comments or notes and submit them as reason codes. PE supports the entry of different types of comments. For example, you can use the comment type reason code for continuous improvement processes or situations where there are documentation errors and detailed comments are required. The following is an example of a comment type reason code setup:

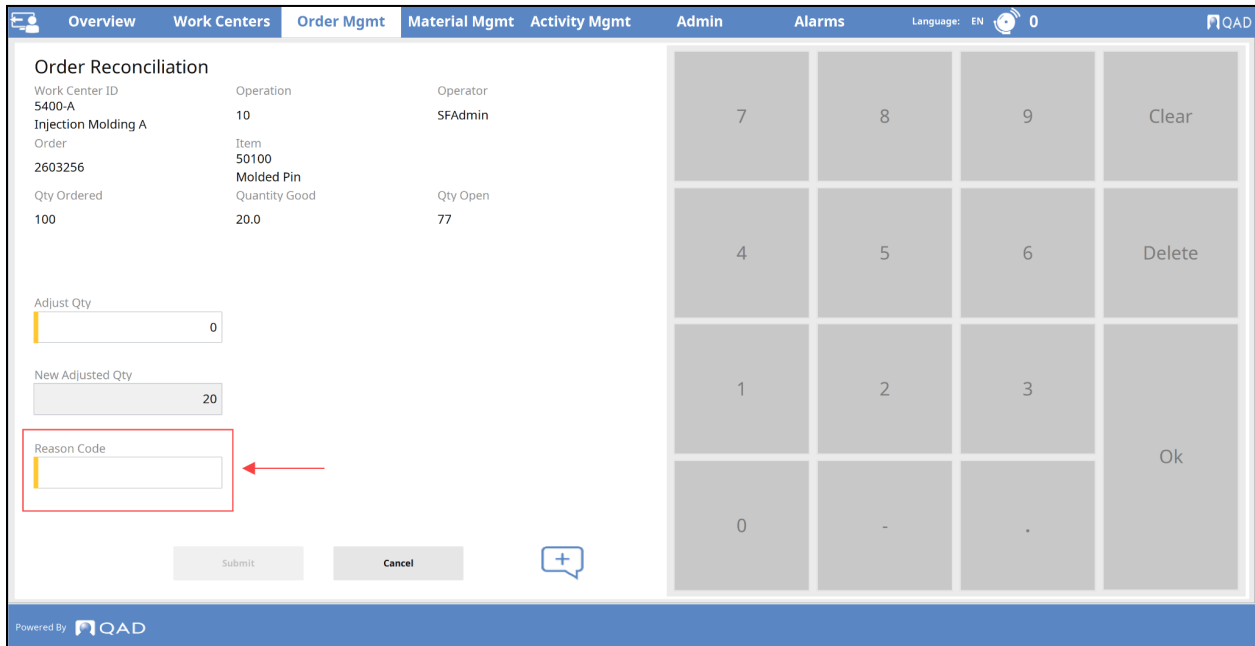
- Reason Code Function = Comment Category
- Reason Type = PE-CMT
- Reason Code = User defined category for comments.

The submitted Comments can be viewed in the Activity Management > Comment Management tab.

Date	Employee	Order ID - Op	Category	Comment Text
** TEST ONLY **				
8/21/21 8:27 AM	Op1	2587681-10	CIP	
8/18/21 11:44 PM	Op1	mgw0621b-10	Shift	Reject material, need to replace.
7/20/21 12:02 AM	SFAdmin	2583995-10	Shift	change shift
6/9/21 10:28 PM	SFAdmin	2584002-10	Tech	This is a comment for testing the Kafka communications replacement.

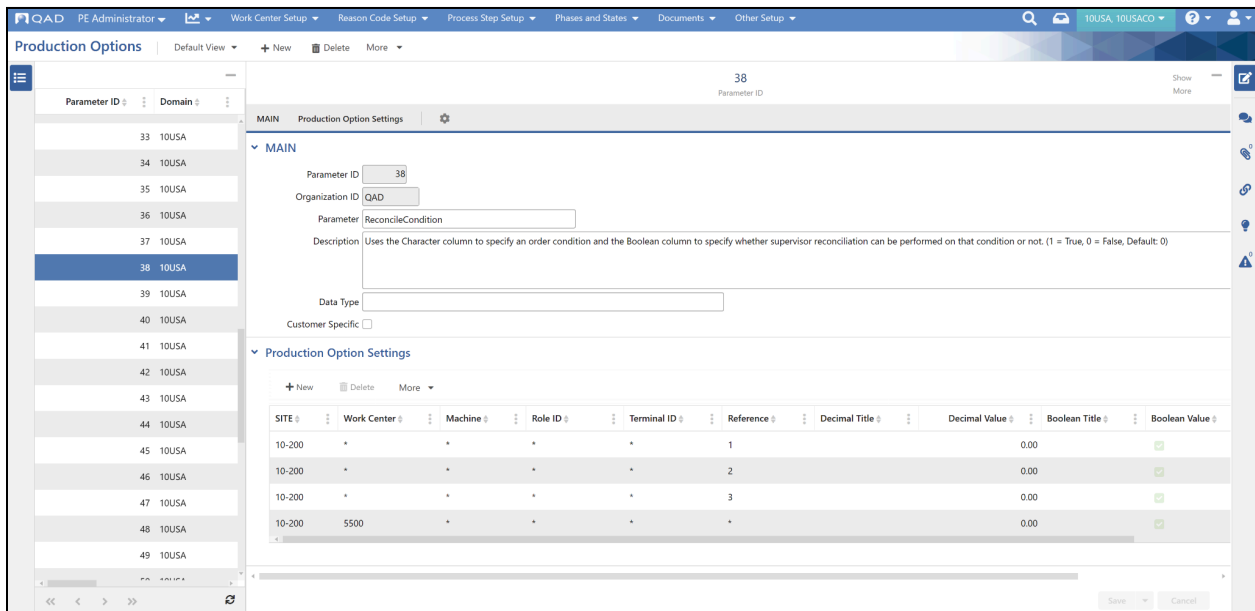
### Reconciliation Reason Codes

QAD Production Execution also allows users to set up reconciliation reason codes where supervisors are permitted to adjust errors in production reporting through Order Reconciliation.



Follow these steps to setup up reconciliation reason codes:

1. In Production Options > Parameter ID 38, enter the following Production Option Settings:



- Key fields are Domain, Site, Work Center and Machine (\* is wild card)
- Boolean must be 1
- String contains the Order Conditions the production order must be in to permit reconciliation; for example, Complete.
- Reason Code Function = Reconciliation

The following is an example of the Reason Type and Reason Codes settings for reconciliation reason

codes:

Reason Type	Reason Code	Subcode	Description
Recon	Recon	R01	Underreported
Recon	Recon	R02	Overreported

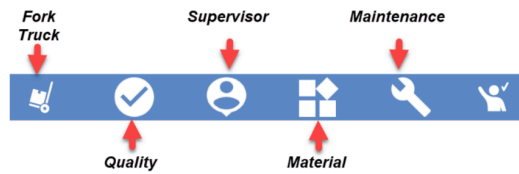
## Request Banner Setup

Use **Request Banners** in QAD Adaptive ERP to create and manage personnel request banners. When setting up request banners, you can change the icons, the number of visible buttons, and the nature of the request. The request banner is assigned at the work center level to allow different equipment/processes to have requests pertinent to the needs of that particular activity.

Sequence	Label	Icon	Bottom Nav	Action ID	Sound ID
1	Fork Truck	ForkTruck	<input checked="" type="checkbox"/>	0	0
2	Quality	CheckCircle	<input checked="" type="checkbox"/>	0	0
3	Supervisor	Supervisor	<input checked="" type="checkbox"/>	0	0
4	Material	Materials	<input checked="" type="checkbox"/>	0	0
5	Maintenance	Wrench	<input checked="" type="checkbox"/>	0	0

The request banner is displayed in the lower right footer of the PE screen. It contains buttons that the operator can press to request things such as materials, maintenance, a supervisor, and so on. The request buttons can be configured to send an email alert or an alert record that is stored in a PE table. Supervisors can see active requests on the Activity Mgmt > Request Management screen.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Op Start	Op End	Perform To Base	Std Rate	Order Qty	Remaining Qty	Last Qty	Price	Last Date
2557545-30			S	QJ-FG	Open			●●●●	5/18/2021	5/17/2021	5/17/2021			1	10	10	0	
2557546-30			S	QJ-FG	Open			●●●●	5/20/2021	5/20/2021	5/20/2021			1	10	10	0	
2557591-30			S	QJ-FG	Open			●●●●	6/28/2021	6/28/2021	6/28/2021			1	15	15	0	
2557700-30			S	QJ-FG	Open			●●●●	6/29/2021	6/29/2021	6/29/2021			1	25	25	0	
2557724-30			S	Item-A	Open			●●●●	7/19/2021	6/24/2021	6/24/2021			1	90	90	0	
2557726-30			S	Item-A	Open			●●●●	7/19/2021	6/29/2021	6/29/2021			1	65	65	0	
2557729-40			S	QJ-FG	Open			●●●●	7/13/2021	7/13/2021	7/13/2021			0	35	35	40	
2557730-40			S	QJ-FG	Open			●●●●	7/13/2021	7/13/2021	7/13/2021			0	45	45		



**Main Panel**

*Banner.* Enter the name of the request banner. If you have work centers that have different types of requests, it is recommended that you set up specific request banners for the different work centers. This name appears in the Work Center Configuration lookup.

*Description.* Enter a short description of the request banner.

**Request Banner Detail**

*Sequence.* Enter the sequence in which the request buttons/icons are displayed on the PE screen.

*Label.* Enter the request button label. The label appears when you hover the mouse over the icon. The label also serves as the Request Type in the Request Management view.

*Icon.* Select the icon that serves as the request button.

**Note:** A collection of icons is provided with PE but users can add their own custom icons if necessary. For more information, see [Icons](#).

*Bottom Nav.* Select this check box if you want the request button/icon to be displayed in the request banner. If this check box is not selected, this request button/icon will not be displayed.

*Action ID.* This field is not currently functional.

*Sound ID.* This field is not currently functional.

**Request Banner Alerts**

Use **Request Banner Alerts** in QAD Adaptive ERP to set up an email alert that is sent to an individual or a group when a request is made from the Request Banner. If you want to use a distribution list, you can use an employee ID for that group of responders. The email address is pulled from the employee record for that employee.

When a request is made from the Request Banner, the Active requests appear highlighted in the request bar for that work center/machine. They also appear in the Activity Management > Request Management tab. Creating an email alert using Request Banner Alerts ensures that the responder sees the Active request even if they forget to check the Request Management tab.

The screenshot shows the 'Request Banner Alerts' configuration screen in the QAD PE Administrator. On the left, there is a table with columns 'SITE', 'Work Center', and 'Machine'. The table contains three rows of data: (A, B, C), (P, Q, R), and (X, Y, Z). On the right, there is a 'Main' section with a gear icon and a 'Main' dropdown menu. Below this, there are several input fields with search icons:

- SITE: 10-100
- Work Center: 1000
- Machine: 2
- Banner: InjMold
- Sequence: 1
- Employee: 10-EMP01

*Site.* Enter the site associated with the request banner alert.

*Work Center.* Enter the work center associated with the request banner alert.

*Machine.* Enter the machine associated with the request banner alert.

*Banner.* Enter the request banner that is linked to this site/work center/machine.

*Sequence.* Enter the sequence for the correct request within the request banner.

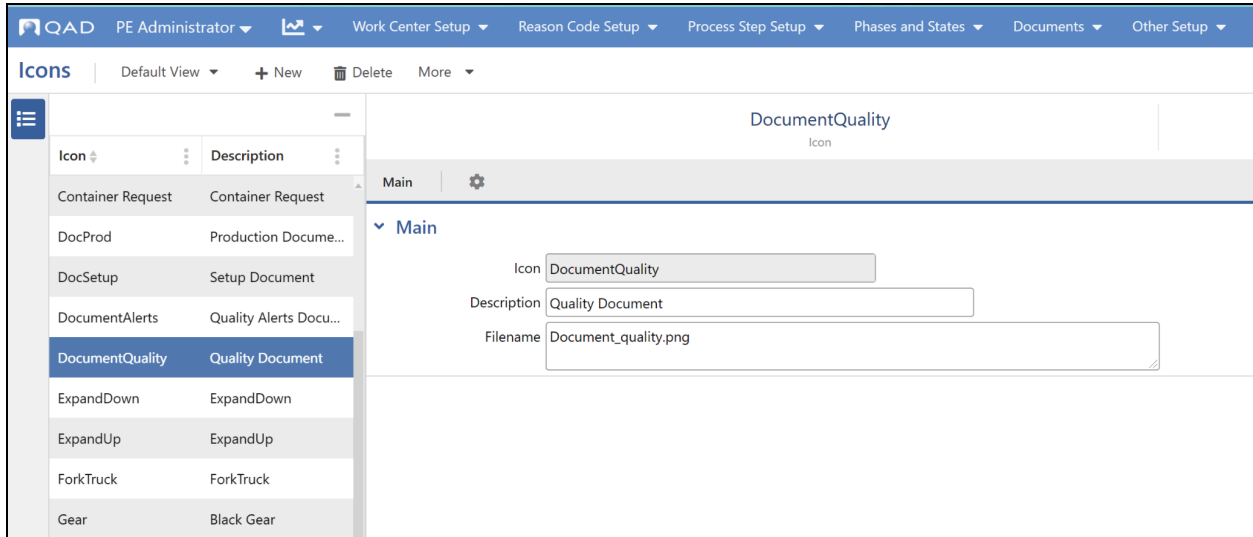
*Employee.* Enter the employee ID, which determines the email address that is used for the request notification. If using a distribution list for the notification, consider a unique employee ID for that group of responders.

## Icons Setup

Use **Icons** in QAD Adaptive ERP to define the icons and images that are used in PE. For example, if you have different document types that users can open in PE, such as quality documents or engineering drawings, you can specify that different icons are used for the different document types.

When configuring the Ignition Designer during PE installation, a collection of icons and images are provided with the installation package. Users can add their own custom icons if necessary. For more information, see the Ignition Designer configuration section in the *Production Execution Installation Guide*.

**Note:** Because the icons are located on a Linux server, the Filename of the icon must match the case of the file stored on the server. The directory in which the icons are stored is determined by the settings in Admin > Integration Management.



*Icon.* Enter a unique name for the icon.

*Description.* Enter a short description of the icon.

*Filename.* Enter the filename of the icon, including the extension. Because the icons are located on a Linux server, the Filename is case sensitive and it must match the case of the filename stored on the server. The directory in which the icons are stored is determined by the settings in Admin > Integration Management. The filename of this icon references the file located in that directory.

**Note:** When configuring the Ignition Designer during PE installation, a collection of icons and images are provided with the installation package. Users can add their own custom icons if necessary. For more information, see the Ignition Designer configuration section in the *Production Execution Installation Guide*.

## Documents and Document Banner Setup

QAD Production Execution provides users the ability to add documents to support the production of items at a work center. The documents are available from the Document Banner on the Work Orders tab and can be opened at any time.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Op Start	Op Due	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
1094-10	50100 Molded Bin	Production				11/4/2021	11/4/2021	0.14%	100	64	27	7	2

Seq	StepName	Status	Time Start/Stop	Action	Time	Employee
1	Visual Insp-hourly	Pending -177:23				Op2
2	Visual Insp-hourly	Pending -177:23				
3	OpenWebsite	Bypassed				

Description	Qty Produced	Reason	User...	Time
Supv1 returned from break			supv1	11/11/2021 1:5...
Supv1 went on break			supv1	11/11/2021 1:5...
Op1 returned from break			op1	11/11/2021 1:5...
Supv1 requested 1 0.62351			supv1	11/11/2021 1:5...

For example, users can add technical documents such as part drawings, work instructions, part specs, packaging specs, setup/teardown instructions, and so on. The documents can be used as reference to provide the operator the important information they need when producing items at the work center. You can set up PE so that when operators are producing specific items, the operators are provided documents that are specific to the item they are producing.

### Using EQMS to Manage Documents in PE

If you are using EQMS with PE, EQMS sends a notification/message to PE when a document is updated or released. PE then retrieves and stores that document on the Ignition server and updates the appropriate PE data tables with the message. PE notifies operators when a document is updated and keeps track of the users who reviewed it and for how long.

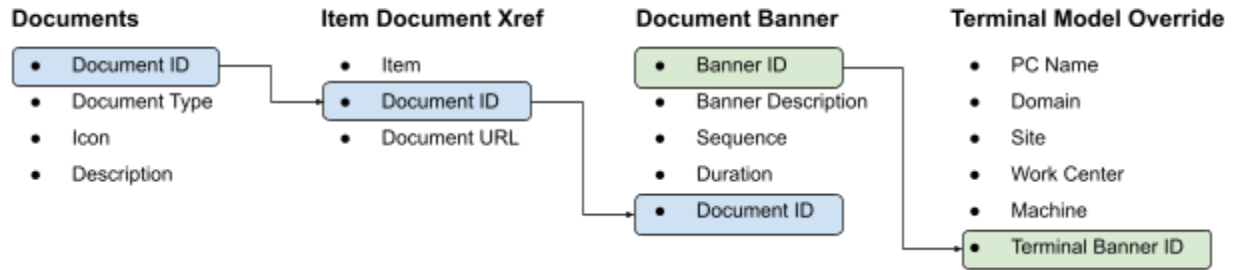
If you are not using EQMS to manage your shop floor documents, you can still have documents available in the PE interface by performing the setup in the PE screens in QAD Adaptive ERP.

### Document Setup Process

Setting up and maintaining the documents should be performed by a system administrator. To set up documents and the document banner, the following PE screens are used:

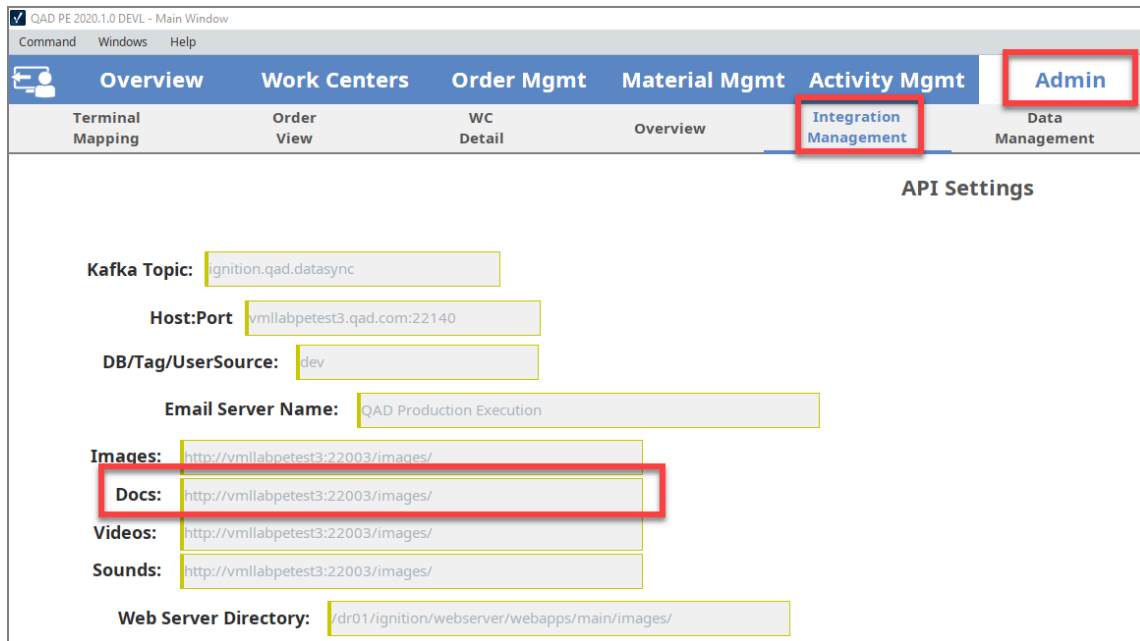
1. **Icons.** Setup the icon used for the different document categories.
2. **Documents.** Define the document category and icon used.
3. **Item Document Xrefs.** Specify the link between documents and items.
4. **Document Banner.** Specify the documents that are displayed in the document banner.
5. **Work Center Configurations.** Specify the link between the document banner and the work center.
6. **Terminal Model Override.** This is very similar to the **Work Order Configurations** screen but with additional functionality that is used when setting up Document Looping at a specific terminal.

### Table Relations for Document Setup



### Document Storage Locations

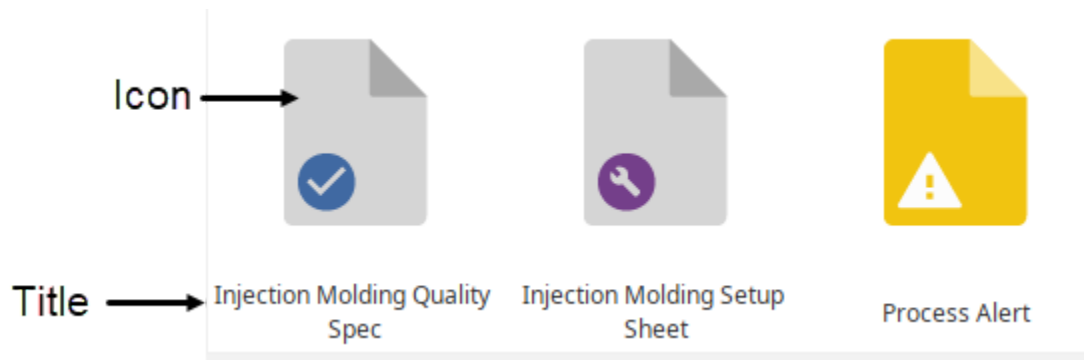
Users need to manually move the document files to the Ignition server. The standard location on the Ignition server for these files is: `dr01/ignition/webserver/webapps/main/images`. If necessary, you can define different storage locations for the different document types in the Admin > Integration Management tab in PE. In this tab, you can define different locations for Images, Documents, Videos, and Sounds. To upload the documents onto the Ignition server, you must have Linux access and an FTP utility, such as FileZilla, WinSCP, or SolarWind.



### Documents

Use **Documents** in QAD Adaptive ERP to create and manage the types of documents that are displayed in the document banner. You can specify which documents are associated with a specific category of documents and the icon that represents that category in the document banner.

The screenshot shows the QAD Documents setup interface. The top navigation bar includes 'QAD', 'Favorites', 'Work Center Setup', 'Reason Code Setup', 'Process Steps Setup', 'Phases and States', 'Documents', and 'Other Setup'. The main area is titled 'Documents' and shows a 'Main' tab with a gear icon. The form fields are: Document (IMQS), Document Type (1), Title (Injection Molding Quality Spec), and Icon (DocumentQuality).



*Document.* Enter the name of the document, which usually represents the document category. For example, you can have a “document” category for quality specs and another for packaging specs.

*Document Type.* Specify the document type:

- 1 - PDF
- 2 - Image (JPG, PNG, GIF)
- 3 - Video (WebM only)

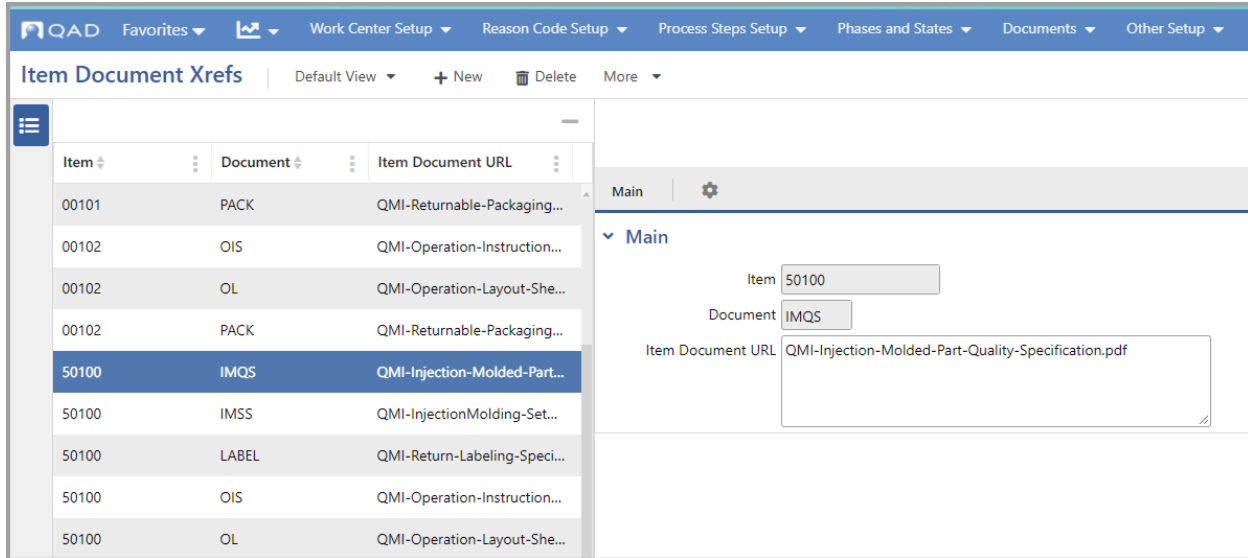
*Title.* Enter the document title. In PE, this title is displayed beneath the document icon.

*Icon.* Select an icon for the document. For example, if this is a document that gives quality control specifications, use an icon related to document quality.

**Note:** A collection of icons and images are provided with the PE installation package but users can add their own custom icons if necessary. For more information, see the Ignition Designer configuration section in the *Production Execution Installation Guide*.

## Item Document Xrefs

Use **Item Document Xrefs** in QAD Adaptive ERP to specify the link between a specific document, document type, and the item part number.



Item	Document	Item Document URL
00101	PACK	QMI-Returnable-Packaging...
00102	OIS	QMI-Operation-Instruction...
00102	OL	QMI-Operation-Layout-She...
00102	PACK	QMI-Returnable-Packaging...
50100	IMQS	QMI-Injection-Molded-Part...
50100	IMSS	QMI-InjectionMolding-Set...
50100	LABEL	QMI-Return-Labeling-Speci...
50100	OIS	QMI-Operation-Instruction...
50100	OL	QMI-Operation-Layout-She...

Item	Document	Item Document URL
50100	IMQS	QMI-Injection-Molded-Part-Quality-Specification.pdf

*Item.* Enter the item number that is linked to the document.

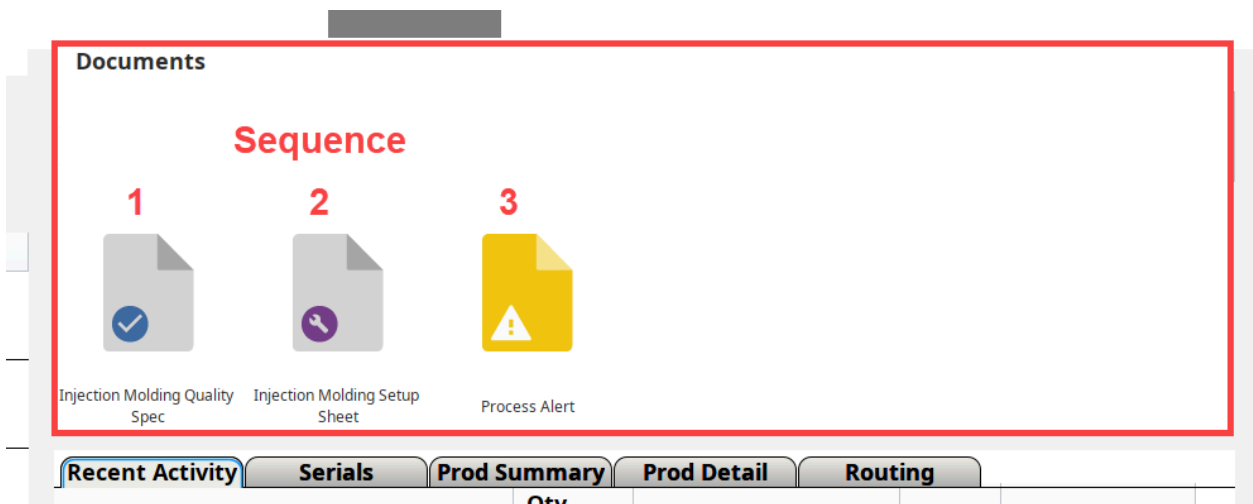
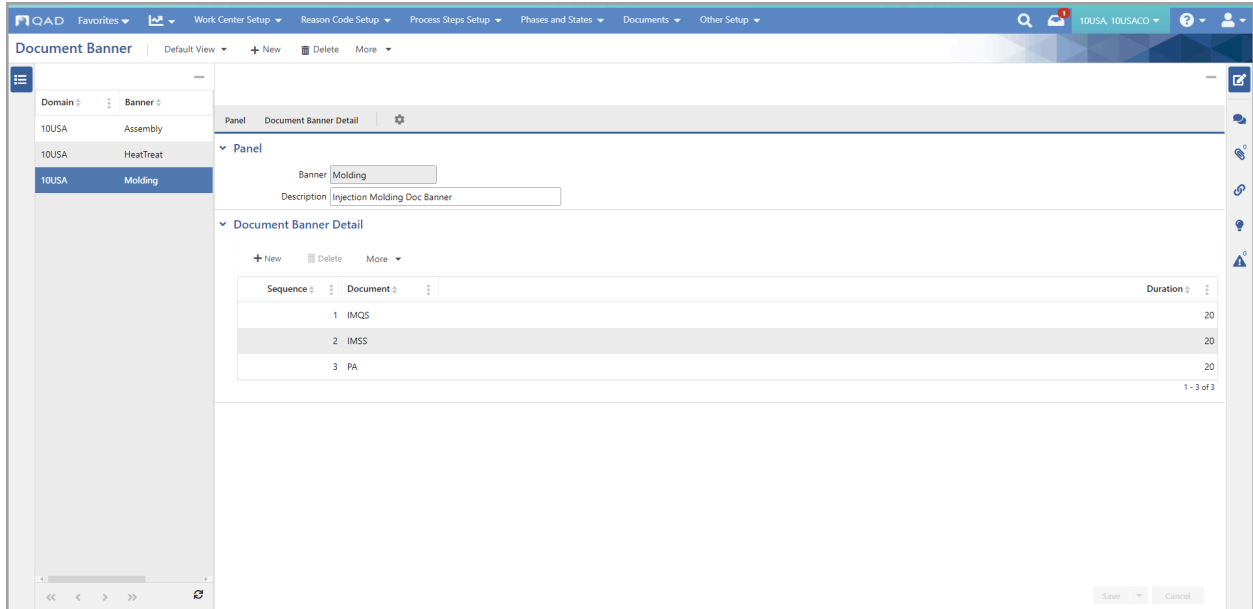
*Document.* Enter the document name that is linked to the item. The document must exist in the system and must have been previously created in **Documents**.

*Item Document URL.* Enter the document file name including the extension. Because the documents are located on a Linux server, the file name is case sensitive and it must match the case of the filename stored on the server.

## Document Banner

Use **Document Banner** in QAD Adaptive ERP to create and manage document banners. You can specify which documents are displayed in the banner and the sequence in which they are displayed. If you are setting up Document Looping, you can also specify the duration the document is displayed on the screen. It is recommended that you create document banners that align with the type of work centers you have. For example, if you have work centers for assembly, heat treating, and injection molding, you should create separate document banners for each type of work center.

**Note:** If you are setting up document looping, it is recommended you create a separate document looping banner for each terminal you are setting up.



### Main Panel

*Banner.* Enter the document banner name. For example, if this banner is for a work center that performs injection molding, you could enter “Molding”. The Banner name is displayed in the lookup for the document banner in the Work Center Configurations screen.

*Description.* Enter a short description of the document banner.

### Document Banner Detail Panel

*Sequence.* Enter the sequence in which the document is displayed in the document banner. The lowest value appears in the left-most position in the banner.

*Document.* Select the document that is displayed in the document banner. The document must exist in the system and must have been set up in **Documents**.

*Duration.* When setting up document looping, enter the duration the document is displayed before moving to the next document in the banner.

This field is only used when setting up document looping. Leave this field blank if you are setting

up a standard document banner.

## Terminal Model Override

**Terminal Model Override** in QAD Adaptive ERP is very similar to the **Work Order Configurations** screen but with additional functionality that is used when setting up Document Looping at a specific terminal. **Terminal Model Override** provides the following additional fields:

*Looping Banner ID.* Enter the document banner that is used to control which documents display in the dedicated terminal, on a loop.

*PC Name.* Enter the Device Name of the PC that serves as the terminal. To locate the Device Name, right click My Computer/This PC and then select Properties > About.

For more information about the other field definitions, see [Work Center Configurations](#).

## Setting up Document Looping on a Terminal

QAD Production Execution allows users to configure a terminal so that it displays reference documents or videos on a loop.

The screenshot shows a window titled 'PE Resources' with a QAD logo in the top right. The main content is a document titled 'CRITICAL QUALITY SHEET' for 'INJECTION MOLDED PARTS'. The document includes the following information:

- Company:** Quality Manufacturing International Inc.
- Inspected Model/Part:** 001ex, 50100, 502xx
- Specification dated:** 3/2/2018
- Procedure:**
  - Visually inspect items, checking for visible issues (see table below) as well as purity of color.
  - Set parts with any identified issues into the designated inspection required location.
- Table of Inspection Criteria:**

Issue	Acceptance Criteria	What to look for
FLASHING	Check finished parts to ensure there is no excess material along the edge of parts	
AIR BUBBLES	Confirm there are no visible air bubbles	
SINK MARKS	Look at areas near thicker features to ensure that there aren't any depressions in adjacent surfaces caused by different rates of cooling	
WELD LINE	Check for weaker areas where the two flow fronts meet and weld together (usually around holes)	
- Signature Section:**

QMI Quality Manager	S. Jaramand		Date	3/2/2018
---------------------	-------------	--	------	----------

At the bottom of the document, there are navigation buttons: 'Previous Page', 'Page # 1', and 'Next Page'. The footer of the window says 'Powered By QAD'.

An example where document looping could be useful would be on a conveyor production line where you have multiple terminals that display instructional information. Using document looping, you can set up each terminal on that production line to loop different documents or videos. The first terminal might display quality documents while the second terminal displays documents related to packaging. On each terminal, PE rotates through the documents, one at a time, for a duration that you specify.

**Note:** The document looping window takes up the whole screen therefore the terminals that are set up with document looping are only used to display the documents and/or videos. These terminals would not be used to process orders.

On the PE screen, the operator is able to view the document or video for a set amount of time before the

next document in the loop is displayed. If the document is multiple pages, they can select the Next or Previous Page buttons to read through the document.

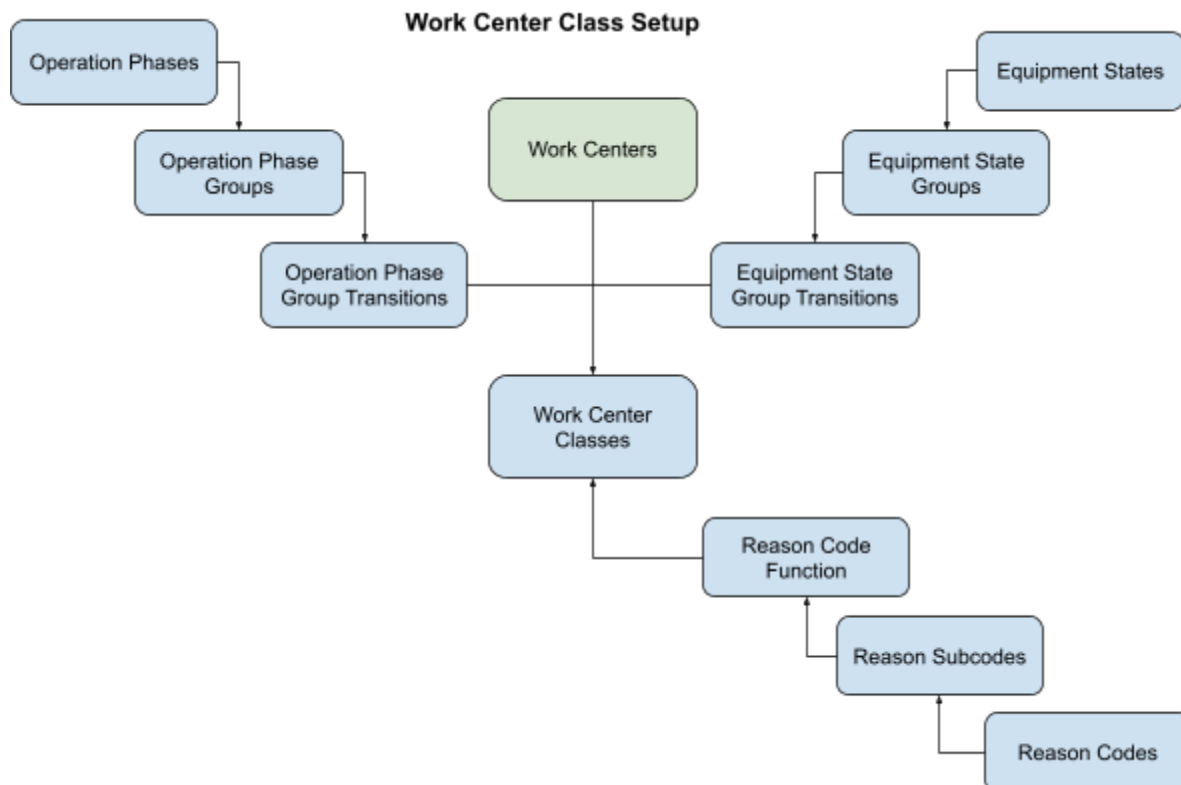
Use the following PE screens to set up document looping.

1. Icons
2. Documents
3. Document Banner
4. Item Document Xrefs.
5. Terminal Model Override
6. Production Options (Optional)

To add and remove documents, the system administrator needs FTP Access at the Operating System level of the server. The sys admin will only have permissions to access the PE Documents directory and will not have access to other directories on the OS.

## Work Center Setup

The graphic below illustrates the series of steps required to set up and configure work centers and work center classes. The Reason Codes, Operation Phases, and Equipment States are defined at a Work Center Class level. The Work Centers are grouped into a Work Center Class. The Steps, Documents, Processes, Documents, and Request Banners are configured for each work center.



## Work Centers

Use **Work Centers** in QAD Adaptive ERP to create and manage work centers. For more information, see [Work Center Setup](#).

**Note:** After setting up new work centers in QAD Adaptive ERP, ensure that PE is updated with the newly

added work center tag data. For more information about importing and refreshing PE with updated work center data, see [Data Management](#).

## Work Center Class

Use **Work Center Class** in QAD Adaptive ERP to create and manage work center classes, which are groups of similar work centers. By grouping work centers together, users are able to configure multiple work centers at once instead of individually. This helps to simplify the setup process by associating certain settings at the higher class level. For example, you can define a work center class for 500 ton presses and another for 1500 ton presses. All work centers associated with this class inherit the settings from that class.

The screenshot displays the 'Work Center Class' configuration window. On the left, a table lists existing classes:

Domain	SITE	Class
10USA	10-100	Injection Moulding
10USA	10-200	Assembly
10USA	10-200	AssySeal
10USA	10-200	Heat
10USA	10-200	InjMold

The main panel shows the details for the 'Assembly' class:

- Class:** Assembly
- Description:** Assembly
- SITE:** 10-200

The 'Phase Group Work Center Class' section includes a table for associating phase groups:

Phase Update To ERP	Phase Group
<input type="checkbox"/>	GenPhase

The 'Work Centers' section shows a table of associated work centers:

Work Center	Machine	Reason Code UI Type
5500	IBLANKI	Button View
5500	9999	Button View
5500	A	Button View

### Main Panel

*Class.* Enter a unique code identifying the work center class. After a work center class record is saved, this field is read only and not editable.

*Description.* Enter a short description of the work center class.

*Site.* Enter the site associated with the work center class.

### Phase Group Work Center Class Panel

Use this panel to associate the work center class with an operation phase group.

*Phase Update to ERP.* Select this check box so that the operation phase data in PE is shared with QAD Adaptive ERP.

*Phase Group.* Enter the operation phase group associated with all production orders produced at the work centers within this class. This field cannot be left blank.

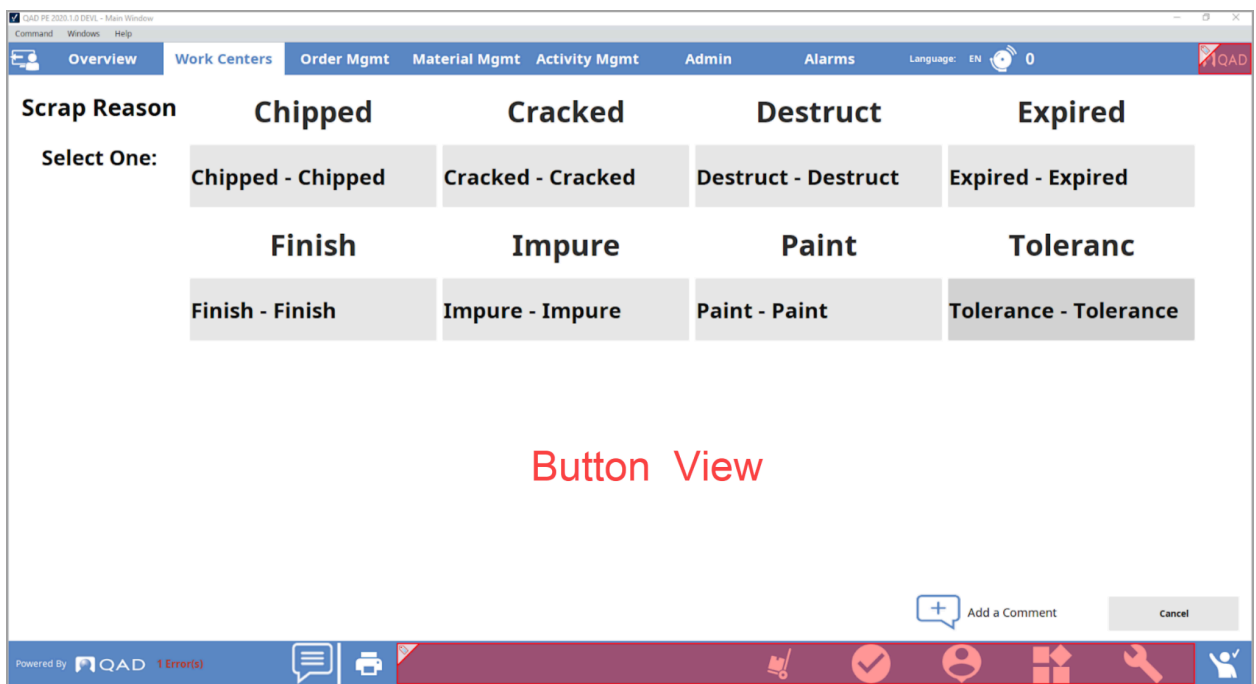
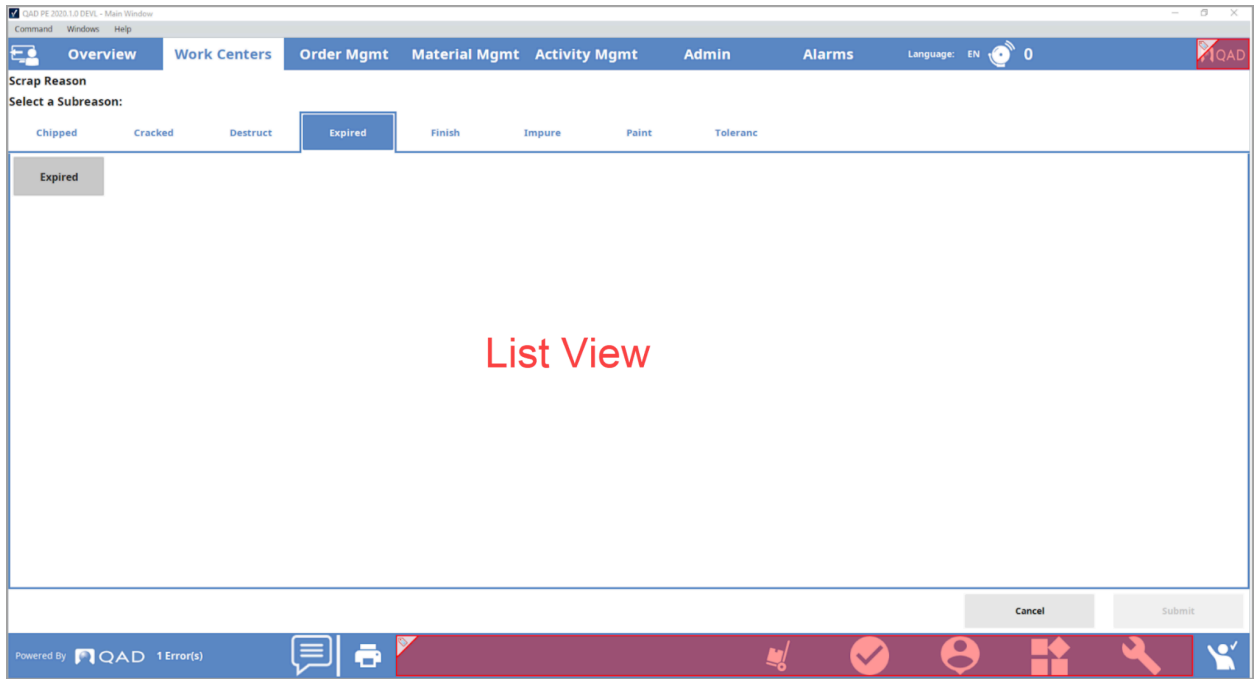
### Work Centers Panel

Use this panel to determine a reason code button type on the UI for a work center.

*Work Center.* Enter the work center that is associated with this work center class.

*Machine.* Enter the machine to associate with the work center. If you are setting up this record so that jobs can be scheduled in PE rather than QAD Adaptive ERP, this value should be 9999. If you want the machine to be a blank value, enter “!BLANK!”.

*Reason Code UI Type.* Select whether the reason code button is displayed in Button View or List View.



**Equipment State Group to Work Center Class Panel**

Use this panel to associate the work center class with an equipment state group.

*State Update to ERP.* Select this check box so that the equipment state data in PE is shared with QAD Adaptive ERP.

*State Group.* Enter the equipment state group to associate with this work center class. This field cannot be left blank.

### Reason Code Assignments Panel

Use this panel to associate specific reason codes with this work center class.

*Reason Code.* Select the reason code to associate with this work center class.

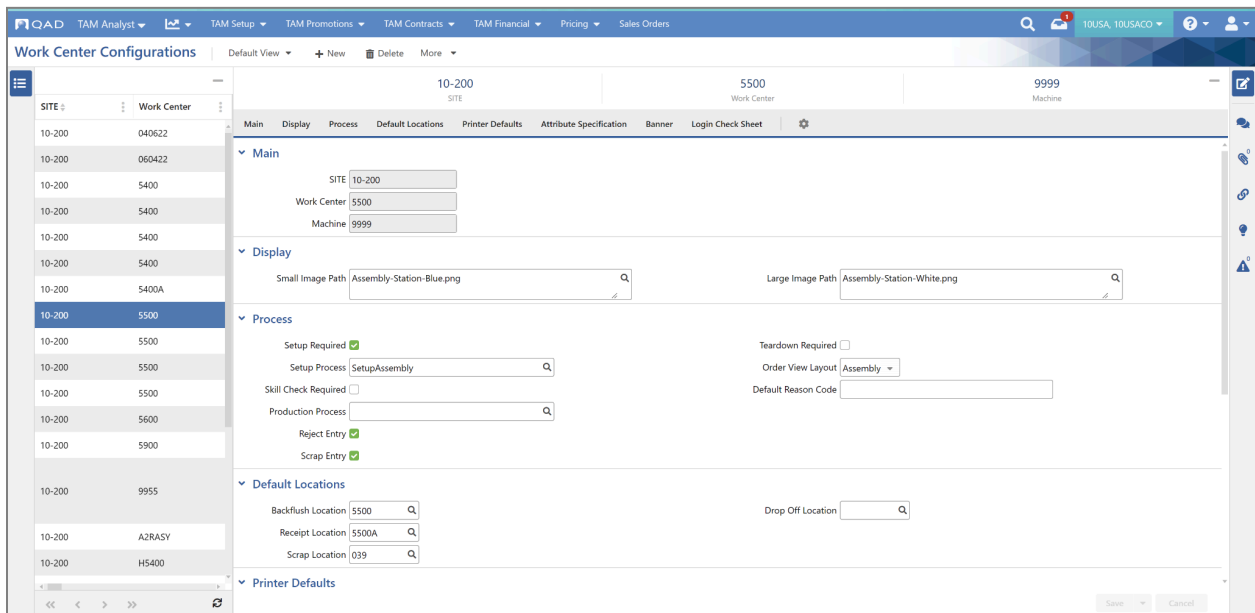
*Reason Type.* Displays the reason type associated with the specified reason code.

*Show on UI.* Select this check box so that the reason code is displayed in the Reason Code UI when the appropriate reason type is activated. If this check box is not selected, the reason code is not displayed. For example, this checkbox would not be selected if the user is not required to select this subcode during a production activity because the subcode is maintained and imported from a PLC.

## Work Center Configurations

**Note:** Before setting up **Work Center Configurations**, the work center/machine must first be set up in Work Center Maintenance in QAD .NET. Creating a new work center from **Work Center Configuration** in QAD Adaptive ERP does not create it in the standard EE work center master.

**Work Center Configurations** provides additional functionality than the standard Work Center Maintenance program in QAD .NET by allowing users to link between the work center/machine and the site.



### Main Panel

*Site.* Enter the site associated with the work center/machine.

*Work Center.* Enter the work center to associate with the terminal model override record. The work center must exist in the system and must have been set up in the **Work Centers** screen in the QAD Adaptive ERP.

*Machine.* Enter the machine to associate with the terminal model override record. If you are setting up this record so that jobs can be scheduled in PE rather than QAD Adaptive ERP, this value should be 9999. If you want the machine to be a blank value, enter “!BLANK!”.

## **Display Panel**

*Small Image Path.* This image/field is not currently used.

*Large Image Path.* Enter the file name for the image representing the work center/machine in the Equipment and Overview screens.

## **Process Panel**

*Setup Required.* Select this check box if setup is required at the work center.

*Setup Process.* If Setup Required is selected, enter the appropriate setup process. The setup process must exist in the system and must have been set up in the **Process** and **Process Steps** screens in QAD Adaptive ERP.

*Skill Check Required.* Select this check box if you want PE to check with EQMS to see if the operator is qualified to work at the work center. This option should only be selected if you are using EQMS.

*Production Process.* If required, enter the appropriate production process. The production process must exist in the system and must have been set up in the **Process** and **Process Steps** screens in QAD Adaptive ERP.

*Reject Entry.* Select this check box if operators can report rejects for jobs at this work center.

*Scrap Entry.* Select this check box if operators can report scrap for jobs at this work center.

*Teardown Required.* Select this check box if teardown is required at this work center.

*Teardown Process.* If Teardown Required is checked, select the appropriate teardown process from the lookup here.

*Order View Layout.* Set the Order View layout in PE to the Assembly, Machine, or Process Control layout.

QAD PE 2020.1.0 DEV - Main Window

Command Windows Help

Overview Work Centers Order Mgmt Material Mgmt Activity Mgmt Admin Alarms Language: EN 0

Work Centers Available Equipment State 2060 Work Center ID Roll Form 1 Work Center Name Operator ID

Production Orders Order View Equipment Inventory Material Request

Search for an Order ID...

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Op Start	Op Due	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2587645-30	CJE-FG CJE-FG	Production				5/17/2021	5/17/2021	2.11%		1	0	10	0

Process Steps

Seq	StepName	Status	Time Start/Stop	Action	Time	Employee
1	Visual Insp-100%					
2	Visual Insp-hourly	Pending	-838:59			
3	OpenWebsite	Pending				

Documents

12/13/2021 12/13/2021 12/13/2021

Injection Molding Quality Spec Injection Molding Setup Sheet Process Alert

Assembly Layout

Recent Activity Serials Prod Summary Prod Detail Routing Item Attr

Description	Qty Produced	Reason	User ID	Time

Powered By QAD 0 Error(s)

QAD PE 2020.1.0 DEV - Main Window

Command Windows Help

Overview Work Centers Order Mgmt Material Mgmt Activity Mgmt Admin Alarms Language: EN 0

Work Centers Available Equipment State 5400-B Work Center ID Injection Molder 2 Work Center Name Operator ID

Production Orders Order View Inventory Equipment Material Request

Search for an Order ID...

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Op Start	Op Due	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
1260-15	50100 Molded Pin	Production				9/4/2019	9/4/2019	313.91%	0.05	-5	105	0	0

Documents

12/13/2021 12/13/2021 12/13/2021

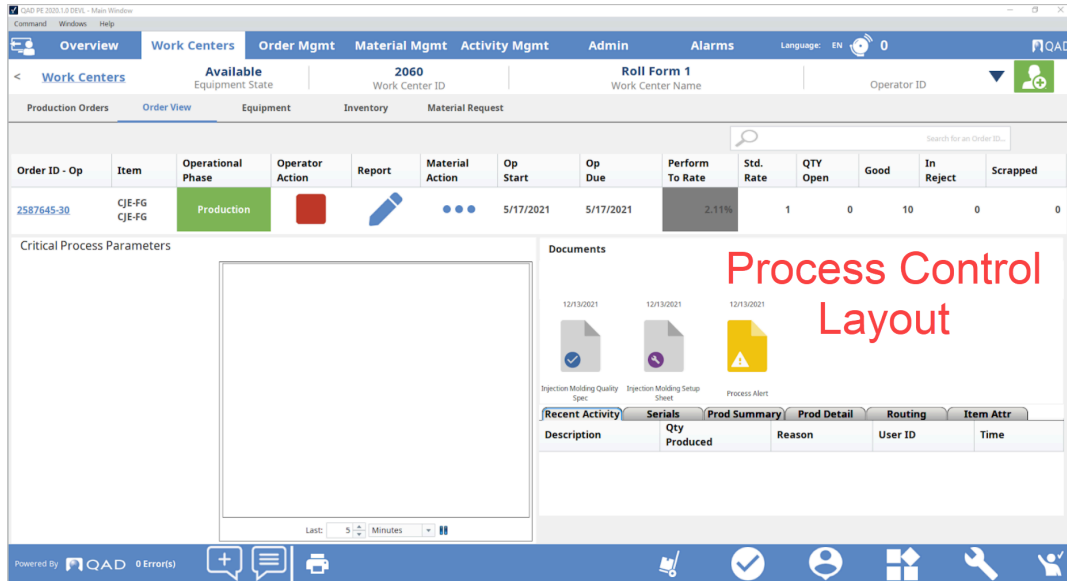
Injection Molding Quality Spec Injection Molding Setup Sheet Process Alert

Machine Layout

50100 Molded Pin

Description	Qty Produced	Reason	User ID	Time
User SFAdmin logged out on workcenter			adminsrf	1/13/2022 7:00 PM
User SFAdmin logged in on workcenter			adminsrf	1/13/2022 9:18 AM
User SFAdmin logged out on workcenter			adminsrf	1/7/2022 7:00 PM

Powered By QAD 1 Error(s)



*Default Reason Code.* This field is not currently used.

### Default Locations Panel

*Backflush Location.* Enter the location from which components are consumed when reporting production at this work center.

*Receipt Location.* Enter the location where the finished goods inventory is received after reporting production.

*Scrap Location.* If using the RejectToInventory production option (Parameter ID 34), enter the non-conforming inventory location where the inventory is stored, pending inspection.

*Drop Off Location.* If using Advanced Warehousing, enter the intermediate staging location for picked inventory, before it is moved to the line.

### Printer Defaults Panel

*Default Printer.* Enter the printer where labels normally print for this work center.

### Attribute Specification Panel

*Document Threshold Days.* Specify the threshold/window (in days) for document changes. If any changes are made to a document within the specified window, the system initiates a new document review and highlights the change date in red in the document banner.

### Banner Panel

*Document Banner.* Enter the document banner associated with this work center.

*Request Banner.* Enter the request banner associated with this work center.

*Second Desktop Screen.* This field is not currently used.

### Login Check Sheet Panel

*Login Checksheet ID.* If using check sheets at this work center, enter the check sheet name. This is the check sheet that is displayed when a user with that role logs in.



## Chapter 3

# Production Options

This chapter discusses the Production Options screen and the pre-configured settings provided with PE. It includes the following topics:

[Production Options](#)

[Production Options Categories](#)

## Production Options

The **Production Options** screen in QAD Adaptive ERP provides additional functional controls that can be applied to different areas of manufacturing and production while manufacturing activities are performed on the shop floor.

Parameter ID	Domain
1	10USA
2	10USA
3	10USA
4	10USA
5	10USA
6	10USA
7	10USA
8	10USA
9	10USA
10	10USA
11	10USA
12	10USA
13	10USA
14	10USA

SITE	Work Center	Machine	Role ID	Terminal ID	Reference	Decimal Title	Decimal Value	Boolean Title	Boolean Value
10-200	!BLANK!	!BLANK!	6	!BLANK!	!BLANK!	!BLANK!	!BLANK!	!BLANK!	!BLANK!

### Main Panel

*Parameter ID.* The unique production option ID that represents the control function to be applied against the manufacturing activity.

*Organization ID.* The organization associated with the production option. The production option records created by QAD will have the Organization ID set to QAD.

**Note:** When creating a new/custom production option, users can enter their own Organization ID but the production option will not function because additional development is required. Adding a production option record to this screen does not have impact without the associated custom logic built into PE.

*Parameter.* The name of the production option activity.

*Description.* A detailed description of how the production option behaves and which elements are used in the setup to achieve the desired result.

*Data Type.* A reference field used for browse, sorting and filtering. Changing the Data Type value has no impact on the functionality of the production option.

*Customer Specific.* A reference check box that identifies a custom production option developed by the customer or users not associated with QAD. This check box is not selected for the production option developed by QAD (Organization ID = QAD).

### Production Option Settings Panel

**Note:** The following fields are identified as key fields. When a key field value is different from other records, a new record is created. If any of the key fields do not require a value, users must enter “!BLANK!” for the system to interpret it as a valid key value.

*Site (Key).* Enter the site associated with the production option. Enter !BLANK! to apply the

option to all sites at the specified production entity.

*Work Center (Key)*. Enter the work center associated with the production option. Enter !BLANK! to apply the option to all work centers at the specified site.

*Machine (Key)*. Enter the machine associated with the production option. Enter !BLANK! to apply the option to all machines at the specified work center.

*Role ID (Key)*. Enter the Role ID associated with the production option. Leave the field blank in order to apply the option for all roles at the specified production entity.

*Terminal ID (Key)*. Enter the computer name associated with the production option. Enter !BLANK! to apply the option to all terminal IDs at the specified production entity.

*Reference (Key)*. Enter the ID number of the production option setting. The ID can be any value between 1 and 99999.

The following title fields are optional and free text fields. These fields can be used to specify what the value setting signifies. If any of the key fields do not require a value, users must enter “!BLANK!” for the system to interpret it as a valid key value.

*Decimal Title*. Enter the setup details associated with the Decimal Value. If not applicable then leave the field blank.

*Decimal Value*. Enter a decimal number to set up the control factor. If not applicable then leave the field blank.

*Boolean Title*. Enter the setup details associated with the Boolean Value. If not applicable then leave the field blank.

*Boolean Value*. Set the control factor to 1 or 0 (yes or no). If not applicable then set the field to 0 (No).

*Character Title*. Enter the setup details associated with the Character Value. If not applicable then leave the field blank.

*Character Value*. Enter the text-based parameters to be used against this production option and set up the control factor as desired. If not applicable then leave the field blank.

*Integer Title*. Enter the setup details associated with the Integer Value. If not applicable then leave the field blank.

*Integer Value*. Enter an integer number to set up the control factor as desired. If not applicable then leave the field blank.

## Configured Settings

Each of the pre-configured production options are explained in the following structure:

- **Purpose**. Gives a description of the production option and describes the results and benefits the specific production option provides the end user.
- **Where**. Explains where the production option is applied, where the end-user triggers the functionality, and where the result is seen.

- **Setting.** Describes the specific production option settings. Most of the production options are set up by only one specific value, such as a boolean, a decimal, or a character value. The settings specified in this section are critical for the production option to be working as expected. These settings are highlighted so the user can focus on this section of the setup.
- **Setup.** Describes the process of setting up the production option in the **Production Options** screen. This section only highlights the fields that are critical for this specific production option.
- **Examples.** To provide a better understanding from the functional perspective, use case examples of the production option are given. Examples describe the process for triggering and navigating to view the production option being applied. It also describes the final result the user sees in PE.

## Production Options Categories

Production Options allows users to apply additional controls to different manufacturing and production areas. The following section organized these manufacturing areas into the following categories:

- **Pack Category.** Production options related to the processing of serialized packs.
- **Reporting Category.** Production options related to production reporting.
- **Request Category.** Production options related to production requests, such as material or personnel requests.
- **Roles Category.** Production options related to user roles.
- **View Category.** Production options related to how the user interacts and sees data on the PE screens.
- **Login Category.** Production options related to how users log into PE.
- **Processing Category.** Production options related to how the system processes data.

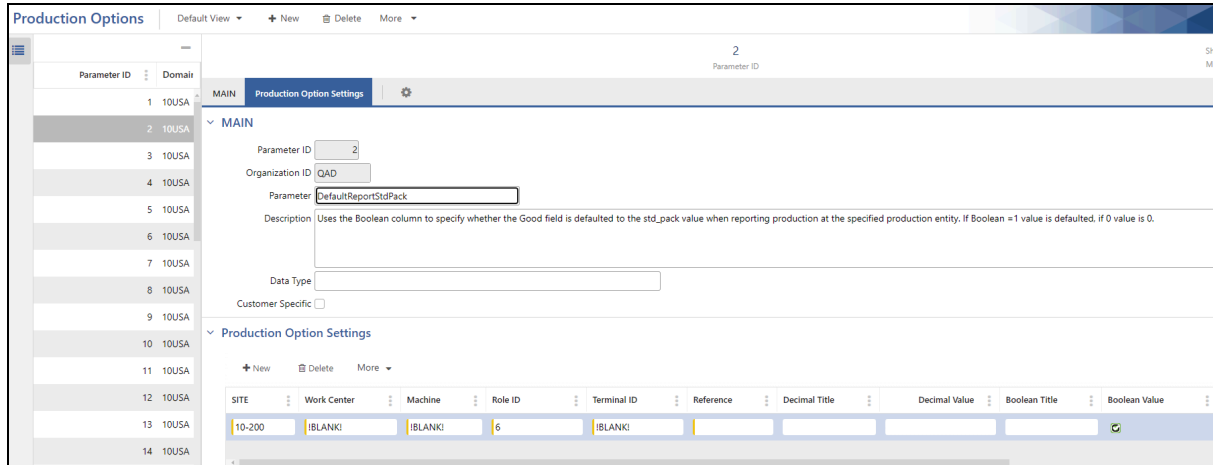
### Pack Category

The following production options are related to the processing of serialized packs.

#### Default Report Standard Pack

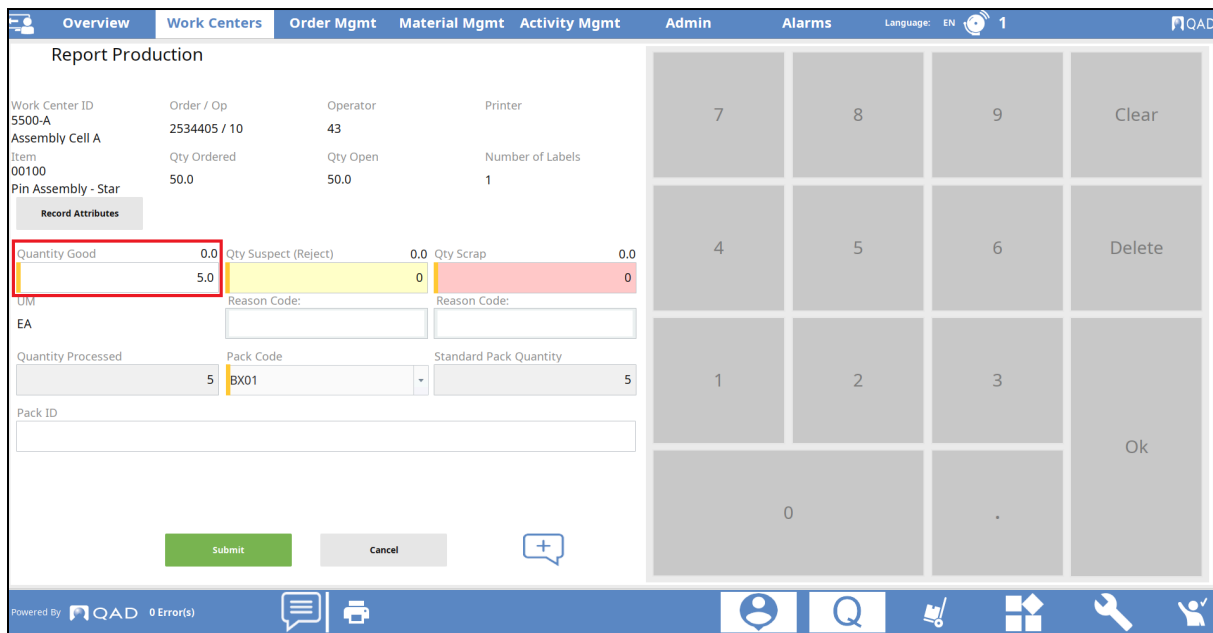
##### Purpose

The Default Report Standard Pack production option allows the user to specify whether the standard pack code quantity is defaulted as the good quantity while reporting production.



**Where**

The production option is applied to the Good Quantity field in the Report Production Screen.



**Setting**

Enter the Boolean Value for this option.

- If Boolean =1, the standard pack value is defaulted.
- If Boolean = 0, the standard pack value is 0.

**Setup**

Field	Setting
Parameter ID	2
Parameter	DefaultReportStdPack

Description	Uses the Boolean column to specify whether the Good field is defaulted to the std_pack value when reporting production at the specified production entity. If Boolean =1, the value is defaulted. If Boolean = 0, the value is 0.
Boolean Title	Enter the setup details for the associated Boolean Value. The Boolean value is critical for the Default Report Standard Pack Option, therefore entering the instructions is useful.
Boolean Value	Set the control factor defining whether you would like to default the standard pack when reporting production: <ul style="list-style-type: none"> <li>1. The standard pack value is defaulted while reporting production.</li> <li>0. The standard pack value is NOT defaulted while reporting production.</li> </ul>

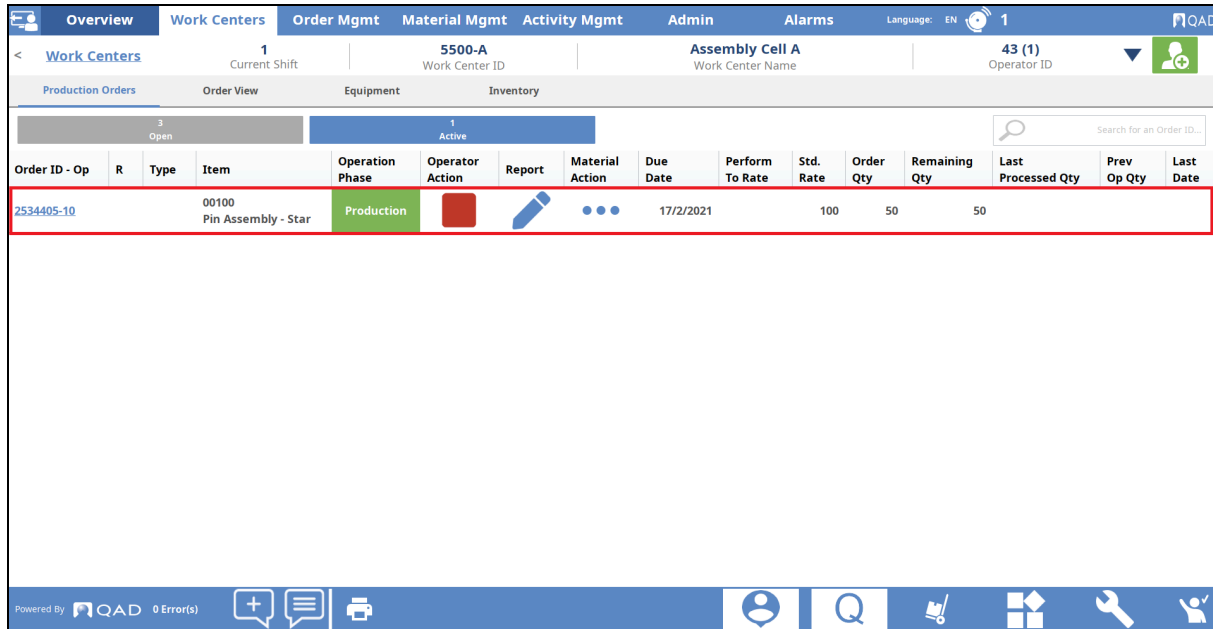
**Examples**

The following steps show the process of reporting production when the default standard pack value is to be defaulted and reported as quantity good.

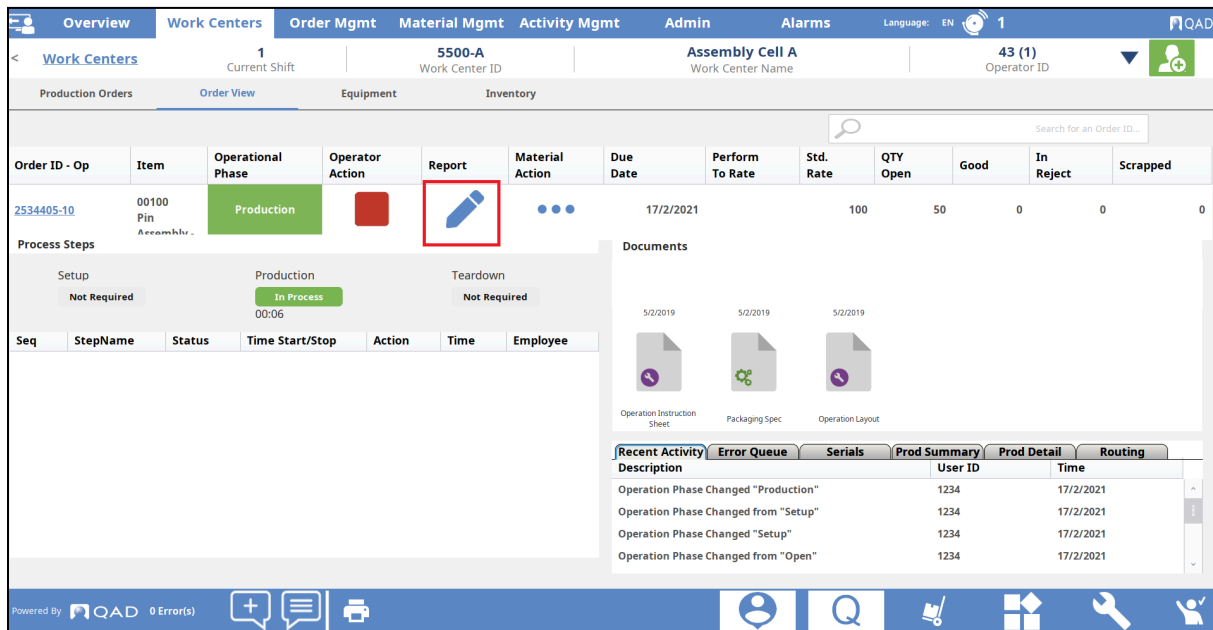
1. In **Production Options** (DefaultReportStdPack), enter Boolean value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Inspection		2507469	Motor Asm 8 Way Seat Adj	0.0%	5	Open	AVAILABLE		0
1020 Fabrication		2541573	52201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58773%	48	Equipment Down	Available		0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	105.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Stopped	Available		0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.120%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2968686667%	3		Available		0
5500-A Assembly Cell A	2	2534405	00100 Pin Assembly - Star	0.0%	1	Production	Available	43	0
5500-B Assembly Cell B		2502531	00100 Pin Assembly - Star	24.0809090909%	2	Open	Available		0
5500-C Assembly Cell C		2502478	00100 Pin Assembly - Star	200.0%	3		Available		0
5900 Heat Treat	2	2502608	50300H Star End Cap	0.0%	11		Available		0

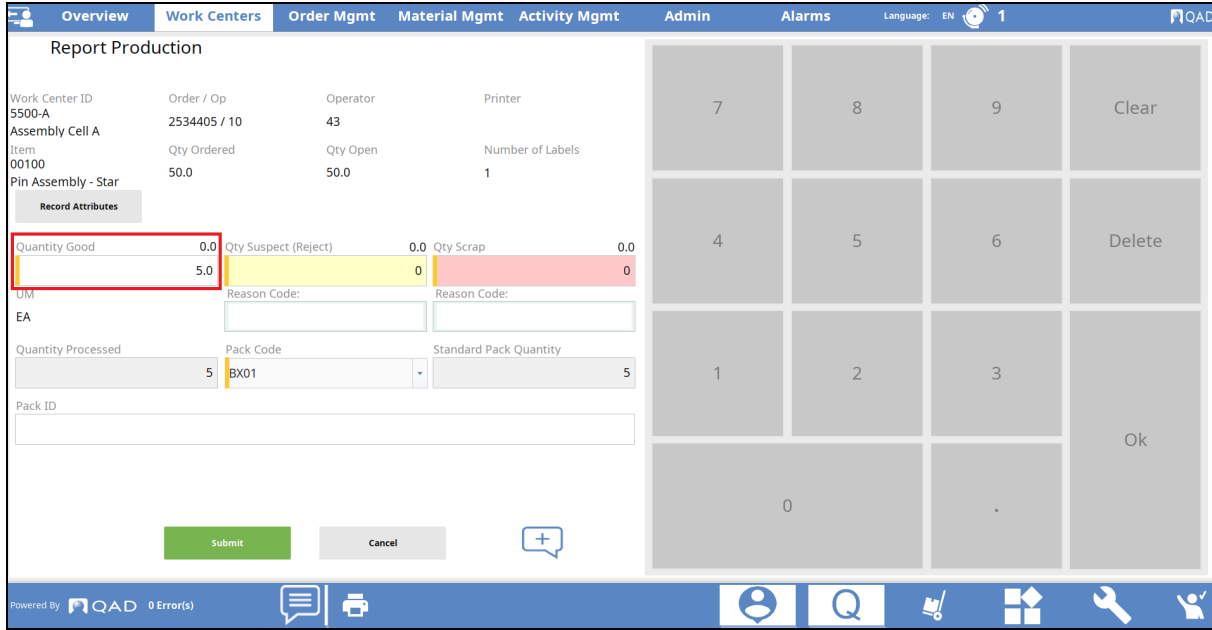
4. Select the production order that you want to report production against.



5. Report Production by selecting the Pencil button.



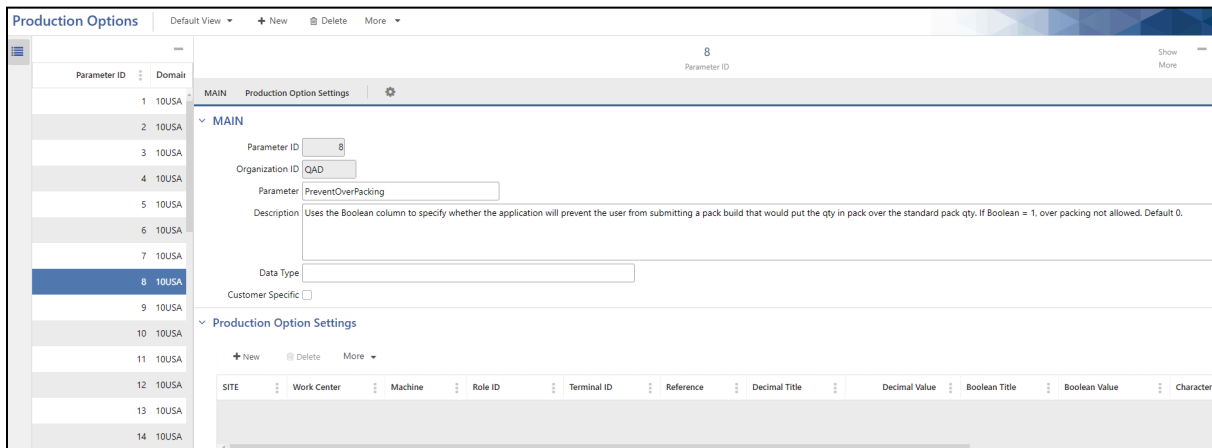
6. Verify whether the quantity equal to the standard pack quantity of this Item defaults into the Quantity Good field. Production Report is immediately ready to be reported.



## Prevent Overpacking

### Purpose

The Prevent Overpacking production option allows the user to specify whether PE allows the user to perform a Build Pack transaction where the quantity in the pack is greater than the standard quantity.



### Where

The production option is applied to the Build Pack screen, when entering a quantity that is greater than the standard pack quantity of pack code entered.

## Setting

Enter the Boolean Value for this option:

- If Boolean = 1, overpacking is not allowed.
- If Boolean = 0, overpacking is allowed.

## Setup

Field	Setting
Parameter ID	8
Parameter	PreventOverPacking
Description	Uses the Boolean column to specify whether the application will prevent the user from submitting a pack build that would put the qty in pack over the standard pack qty. If Boolean = 1, over packing is not allowed. Default 0.
Boolean Title	Enter the setup details for the associated Boolean Value. The Boolean value is critical for the Prevent Overpacking Option, therefore entering the instructions is useful.
Boolean Value	Set the control factor defining whether you would like to allow for overpacking a standard pack quantity when performing the Pack Build transaction. <ul style="list-style-type: none"> <li>• <b>1.</b> The overpacking is NOT allowed.</li> <li>• <b>0.</b> Overpacking is allowed.</li> </ul>

## Examples

Perform the Pack Build transaction and pack more quantity than the standard pack quantity of the pack code.

1. In **Production Options** (PreventOverPacking), enter Boolean value = 1.
2. Log in to PE.

3. Log in to the work center against which you applied the setting.

QAD									
Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	1	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Inspection		250/469	Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
1020 Fabrication		2541573	52201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58773%	48	Equipment Down	Available		0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	105.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Stopped	Available		0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.123%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2986666667%	3		Available		0
5500-A Assembly Cell A	2	2534405	00100 Pin Assembly - Star	0.0%	1	Production	Available	43	0
5500-B Assembly Cell B		2502531	00100 Pin Assembly - Star	24.0903090309%	2	Open	Available		0
5500-C Assembly Cell C		2502478	00100 Pin Assembly - Star	200.0%	3		Available		0
5900 Heat Treat	2	2502608	50300H Star End Cap	0.0%	11		Available		0

4. Navigate to the Inventory Tab for the work center.

QAD									
Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	1	QAD
Work Centers		1	5500-A	Assembly Cell A		43 (1)			
Current Shift		Work Center ID		Work Center Name		Operator ID			
Production Orders		Order View	Equipment	Inventory					
22 Backflush	22 Receipt	22 All	Search...			Summary	Detail	Refresh	
Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Action	
00100	Pin Assembly - Star	5500A	161			BX01	Multiple	...	
50201	Small Bushing	5500A	799			BX01	Multiple	...	
50200	Large Bushing	5500A	-161	Multiple				...	
62251	High Density PolyEthylene	5500A	4					...	
50100	Molded Pin	5500A	-1	Multiple				...	
C100	Component 1	5500A	-477					...	
02001	Automotive Connector	5500A	-1					...	
50300H	Star End Cap	5500A	-201					...	
Show 0 Requests		Cancel Pending	Close All Complete						

5. Select the Detail button to view details of the inventory at the selected work center.

## 73 QAD Production Execution - Setup Guide

The screenshot shows the QAD Production Execution interface. The top navigation bar includes Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The current view is 'Work Centers' for '5500-A' (Work Center ID) and 'Assembly Cell A' (Work Center Name). The operator is 'Kasia Lukowska (1)'. The 'Inventory' tab is selected, and the 'Detail' button is highlighted with a red box. Below the navigation bar is a table with the following data:

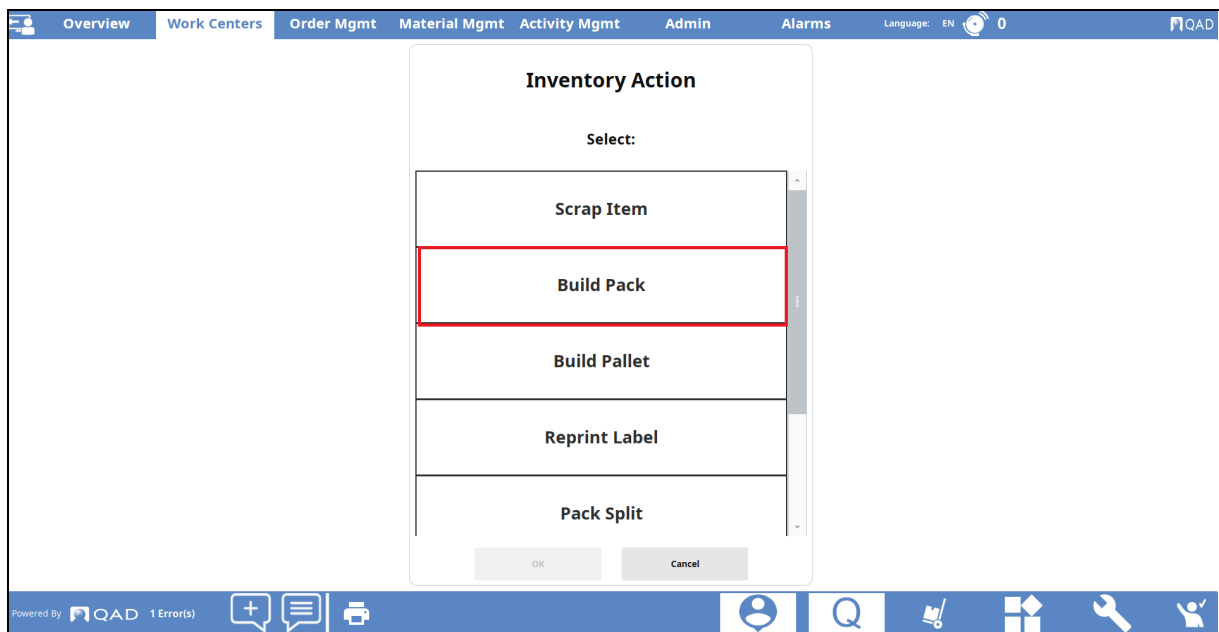
Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	...
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	...
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	...
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	...
00100	Pin Assembly - Star	5500A	161						0	191	...
50100	Molded Pin	5500A	-1	2502473					0	0	...

6. Initiate the action against the inventory by pressing the Action dots.

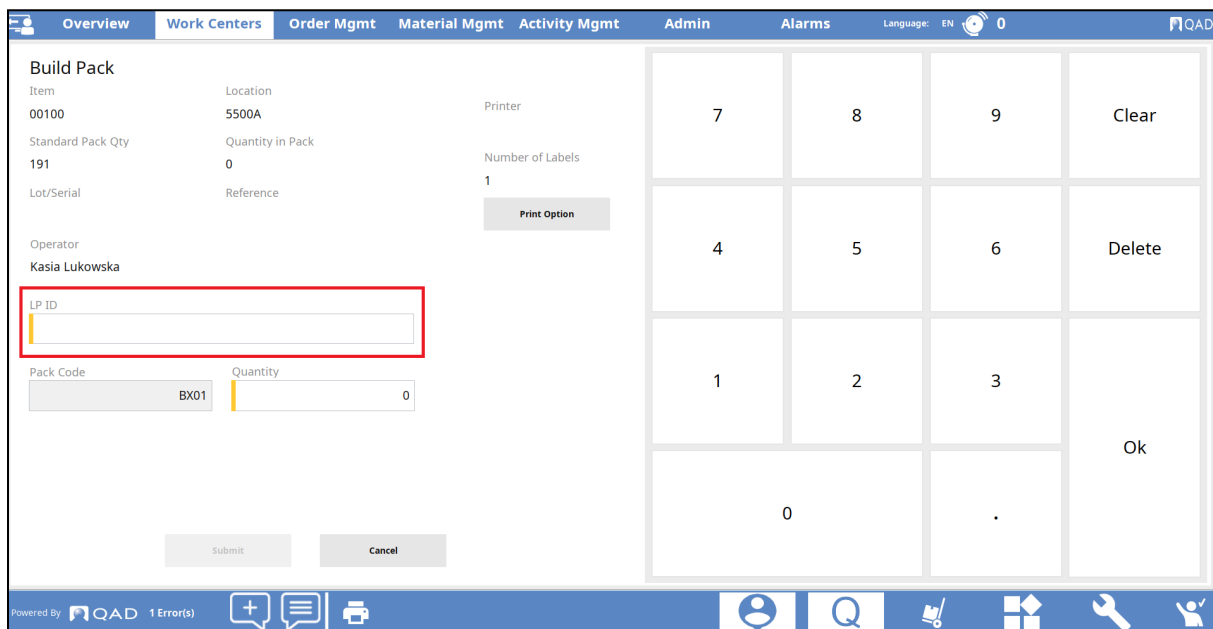
The screenshot shows the QAD Production Execution interface, similar to the previous one. The 'Inventory' tab is selected, and the 'Action' column of the table is highlighted with a red box. The table data is the same as in the previous screenshot:

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	...
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	...
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	...
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	...
00100	Pin Assembly - Star	5500A	161						0	191	...
50100	Molded Pin	5500A	-1	2502473					0	0	...

7. Select the Build Pack transaction.



8. Enter the pack serial for which you will add the inventory.



9. Enter a quantity of items that exceeds the Standard Pack Quantity of the serial.

When entering a quantity that exceeds the standard pack quantity, the system immediately displays the message that overpacking functionality is disabled and you will not be allowed to perform the transaction (Submit button is disabled).

The screenshot shows the 'Build Pack' screen in the QAD Production Execution system. The 'Standard Pack Qty' is set to 5. The 'Quantity' field is set to 10, which triggers a warning message: 'Over-packing is not allowed at this work center.' The interface includes a navigation bar with tabs like Overview, Work Centers, Order Mgmt, etc., and a numeric keypad on the right.

## Prevent Overreporting Pack

### Purpose

The Prevent Overreporting Pack production option allows the user to set up the warning and error threshold percentages for reporting production over the standard pack amount.

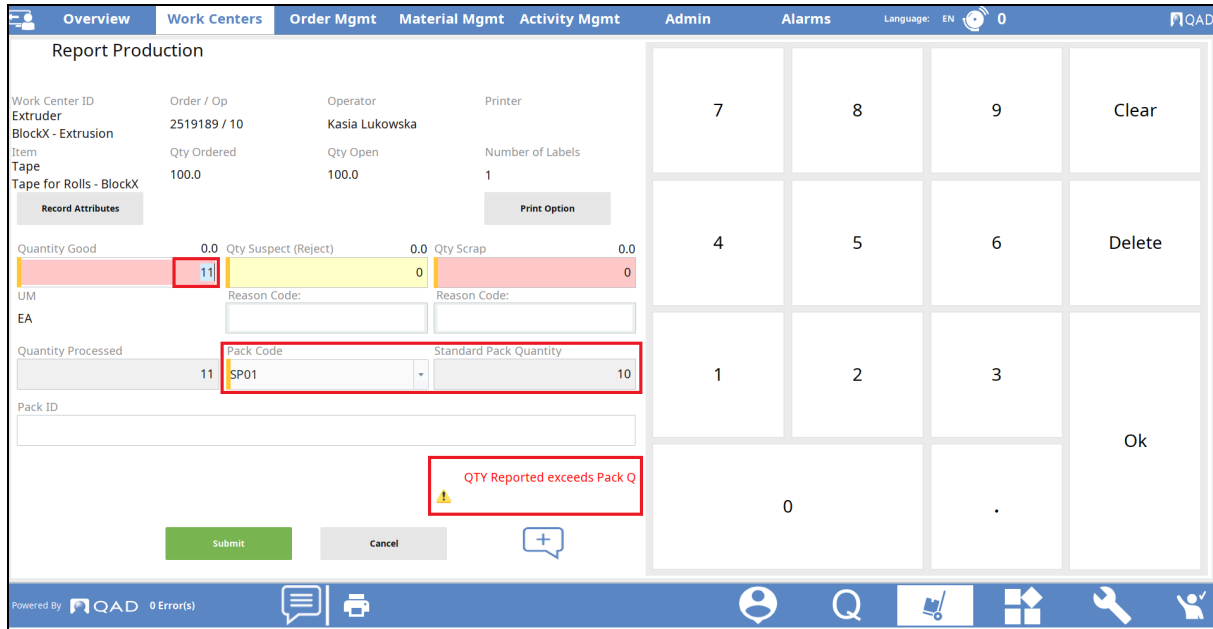
Users can set a percentage threshold that triggers a warning message, which informs the user that the pack is overreported but it does not stop the user from proceeding.

Users can also set a percentage threshold that triggers an error message, which informs the user that the pack is overreported, which stops the user from proceeding.

The screenshot shows the 'Production Options' setup screen. The 'PreventOverreportingPack' parameter is configured with a description: 'Uses the char column to provide two values separated by semicolon (;) representing the warning threshold and error threshold percentages for reporting production over the standard pack amount. A negative value (-1) will be ignored.' The screen shows a list of parameters on the left and a detailed view of the selected parameter on the right.

### Where

The production option is applied to the Report Production Screen, when entering a quantity greater than is the standard pack quantity by the specified threshold percentage.



**Setting**

Enter the two Character Values, each separated by a semicolon (;). The first value represents the warning threshold percentage and the second value represents the error threshold percentage: *<warning threshold percentage>;<error threshold percentage>*.

The following is an example when the Character Value is set to “1;2”:

- A warning message is displayed when the reported quantity is more than 1% of the total quantity of the standard pack value.
- An error message is displayed when the reported quantity is more than 2% of total quantity of the standard pack value.

**Note:** Enter positive values only. Negative values (-1) are ignored.

**Setup**

Field	Setting
Parameter ID	11
Parameter	PreventOverreportingPack
Description	Uses the char column to provide two values separated by a semicolon (;). The two values represent the warning threshold and error threshold percentages for reporting production over the standard pack amount. Negative values (-1) are ignored.
Character Title	Enter the setup details associated with the Character Value field. The Character value is critical for the Prevent Over Reporting Pack Option, therefore entering the instructions is useful.
Character Value	Enter the text-based parameters to be used against this production option and set up the control factor as desired. For Prevent Over Reporting Pack Option, set up two values

separated by the semicolon (;). The first value represents the warning threshold percentage and the second value represents the error threshold percentage: *<warning threshold percentage>;<error threshold percentage>*.

**Example**

Follow these steps to report production with a quantity greater than the standard quantity of pack:

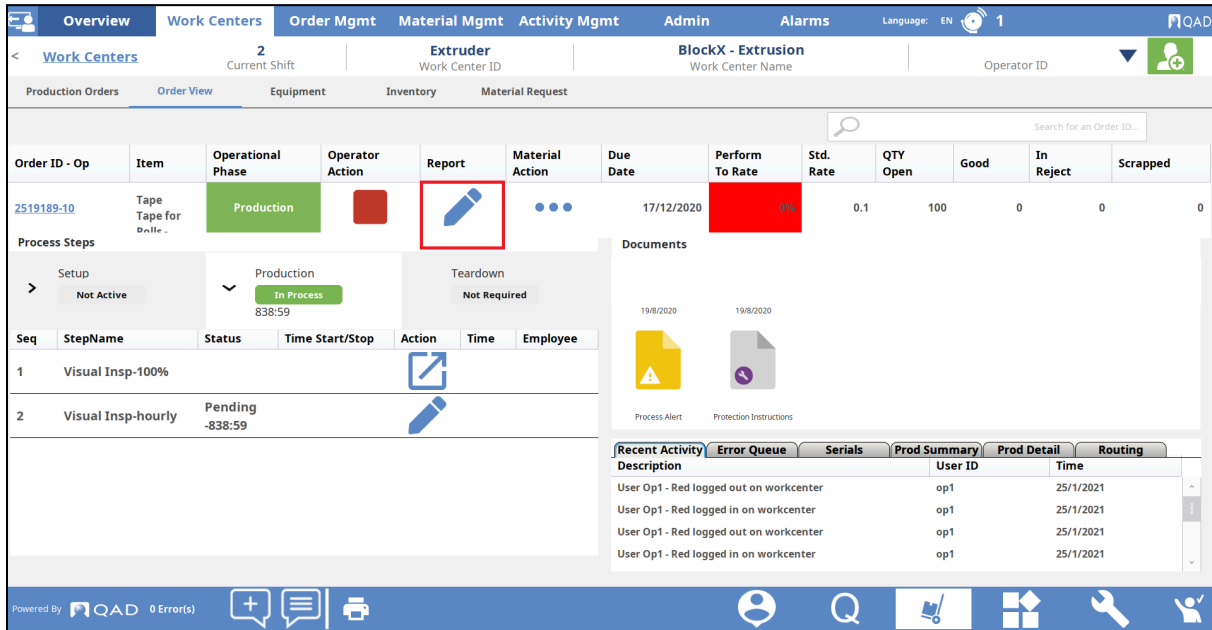
1. In **Production Options** (PreventOverreportingPack), set the Character Value to 1;1.1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Weaving BlockX - Weaving				0.0%	0		Available		0
Extruder BlockX - Extrusion	1	2507892 (3)	Tape Tape for Rolls - BlockX	100.0%	8	Production	Available		0

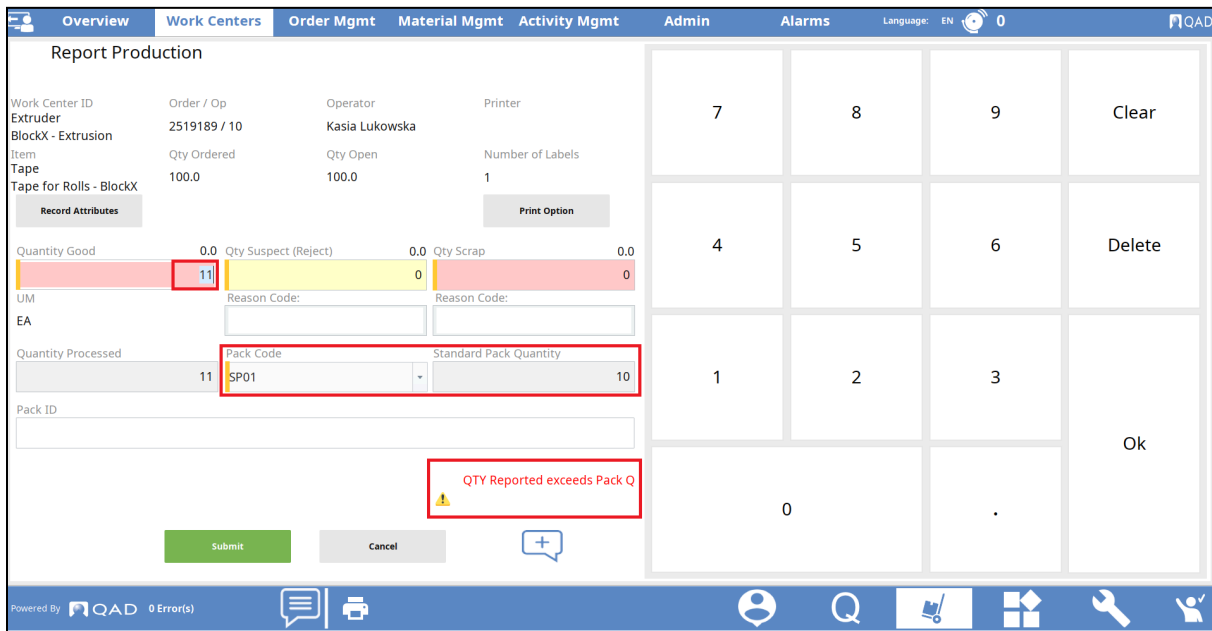
4. Locate the production order for which you will report produced items and navigate to the last operation routing.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2507892-10	●		Tape Tape for Rolls - BlockX	Production	■	✎	●●●	19/8/2020	100%	0.1	50	0	10		25/1/2021
2519188-10			Tape Tape for Rolls - BlockX	Production	■	✎	●●●	17/12/2020	100%	0.1	50	50		5	25/1/2021
2519189-10			Tape Tape for Rolls - BlockX	Production	■	✎	●●●	17/12/2020	100%	0.1	100	100		10	17/12/2020

5. Select the Pencil button to navigate to the Report Production screen.



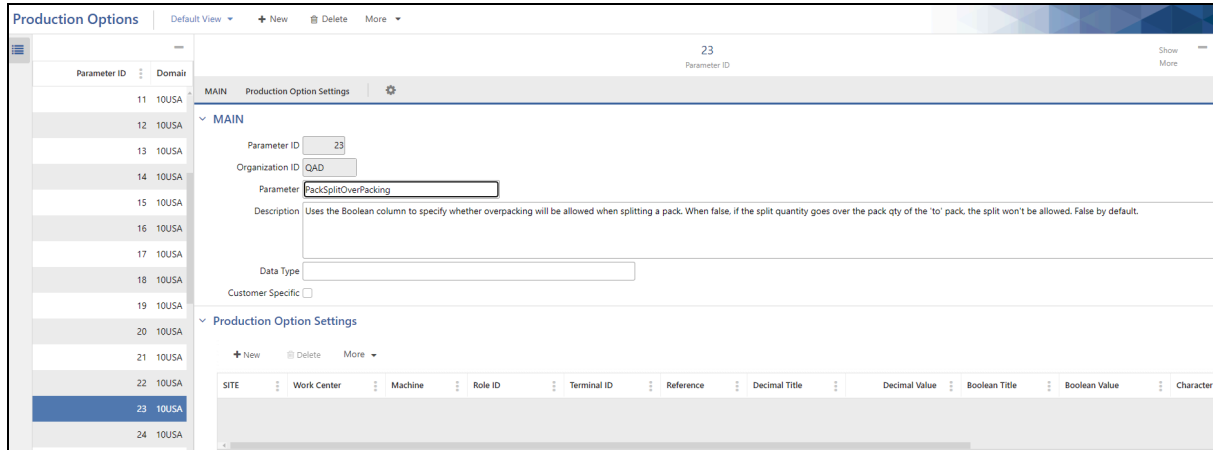
6. Enter a quantity that is greater than the standard quantity of the pack. At the bottom of the screen, verify the warning message: “Quantity Reported exceeds Pack Qty” is displayed.



## Pack Split Overpacking

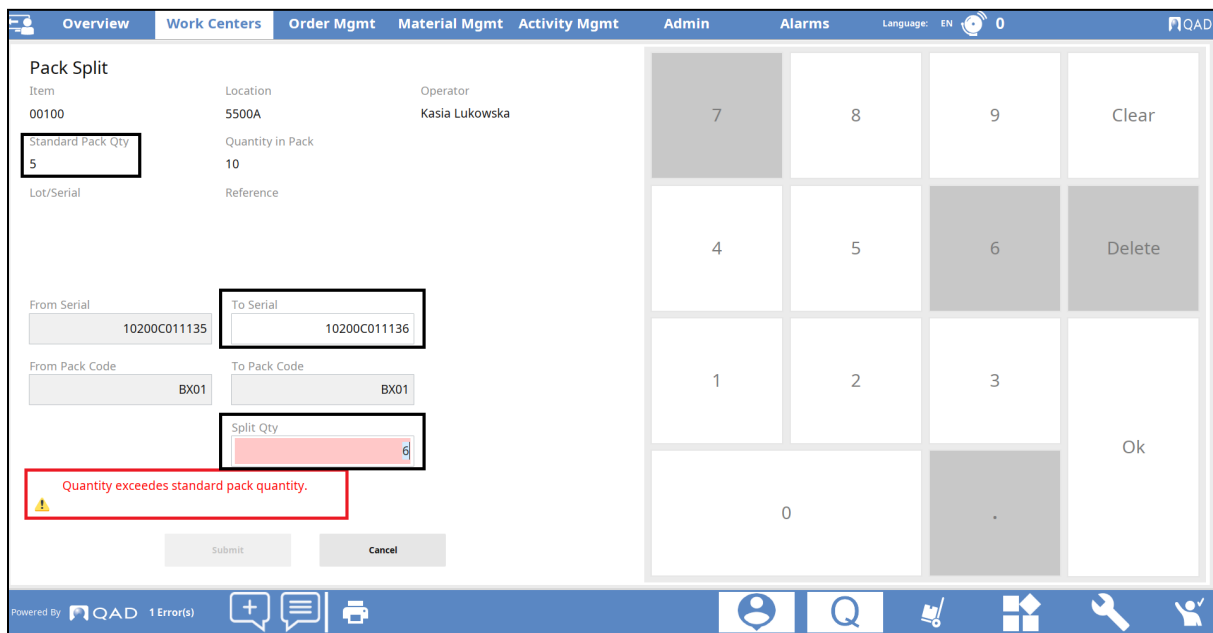
### Purpose

The Pack Split Overpacking production option allows the user to specify whether overpacking is allowed when splitting a pack.



**Where**

The production option is applied when performing a Pack Split transaction and you enter a quantity that is greater than the standard pack quantity of entered pack code.



**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, overpacking is allowed.
- If Boolean = 0, overpacking is NOT allowed. This is the default setting.

**Setup**

Field	Setting
Parameter ID	23
Parameter	PackSplitOverPacking

Description	Uses the Boolean column to specify whether overpacking will be allowed when splitting a pack. When false (0), if the split quantity goes over the pack qty of the 'to' pack, the split is not allowed. Default setting is 0.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Pack Split Overpacking, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value that determines whether overpacking is or is not allowed during the Pack Split transaction: <ul style="list-style-type: none"> <li>● 1. The overpacking is allowed.</li> <li>● 0. Overpacking is NOT allowed.</li> </ul>

**Example**

Perform the Pack Split transaction and enter a split quantity that is greater than the standard pack quantity of the pack to which the items are split.

1. In **Production Options** (PackSplitOverPacking), enter Boolean Value = 0.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Inspection		2507469	Motor Asm 8 Way Seat Adj	0.0%	5	Open	AVAILABLE		0
1020 Fabrication		2541573	52201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58773%	48	Equipment Down	Available		0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	105.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Stopped	Available		0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%	3		Available		0
5500-A Assembly Cell A	2	2534405	00100 Pin Assembly - Star	0.0%	1	Production	Available	43	0
5500-B Assembly Cell B		2502531	00100 Pin Assembly - Star	24.0000000000%	2	Open	Available		0
5500-C Assembly Cell C		2502478	00100 Pin Assembly - Star	200.0%	3		Available		0
5900 Heat Treat	2	2502608	50300H Star End Cap	0.0%	11		Available		0

4. Navigate to the Inventory Tab for this work center.

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Action
00100	Pin Assembly - Star	5500A	161			BX01	Multiple	...
50201	Small Bushing	5500A	799			BX01	Multiple	...
50200	Large Bushing	5500A	-161	Multiple				...
62251	High Density PolyEthylen	5500A	4					...
50100	Molded Pin	5500A	-1	Multiple				...
C100	Component 1	5500A	-477					...
02001	Automotive Connector	5500A	-1					...
50300H	Star End Cap	5500A	-201					...

5. Press the Detail button to view details of the inventory at the selected work center.

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	...
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	...
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	...
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	...
00100	Pin Assembly - Star	5500A	161						0	191	...
50100	Molded Pin	5500A	-1	2502473					0	0	...

6. Initiate the action against the inventory by selecting the Action dots.

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	...
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	...
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	...
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	...
00100	Pin Assembly - Star	5500A	161						0	191	...
50100	Molded Pin	5500A	-1	2502473					0	0	...

7. Select the Pack Split transaction.

**Inventory Action**

Select:

- Build Pallet
- Reprint Label
- Pack Split
- Pack Merge
- Remove Pack

8. Enter the pack serial for which you will add the inventory.

The screenshot shows the 'Pack Split' interface in QAD. The top navigation bar includes 'Overview', 'Work Centers', 'Order Mgmt', 'Material Mgmt', 'Activity Mgmt', 'Admin', and 'Alarms'. The main area displays the following information:

- Item: 00100
- Location: 5500A
- Operator: Kasia Lukowska
- Standard Pack Qty: 5
- Quantity in Pack: 10
- Lot/Serial: Reference

Input fields include:

- From Serial: 10200C011135
- To Serial: 10200C011136 (highlighted with a red box)
- From Pack Code: BX01
- To Pack Code: BX01
- Split Qty: (empty)

Buttons at the bottom include 'Submit' and 'Cancel'. A numeric keypad is visible on the right side of the screen.

9. Enter a quantity of items that exceeds the Standard Pack Quantity of the serial.

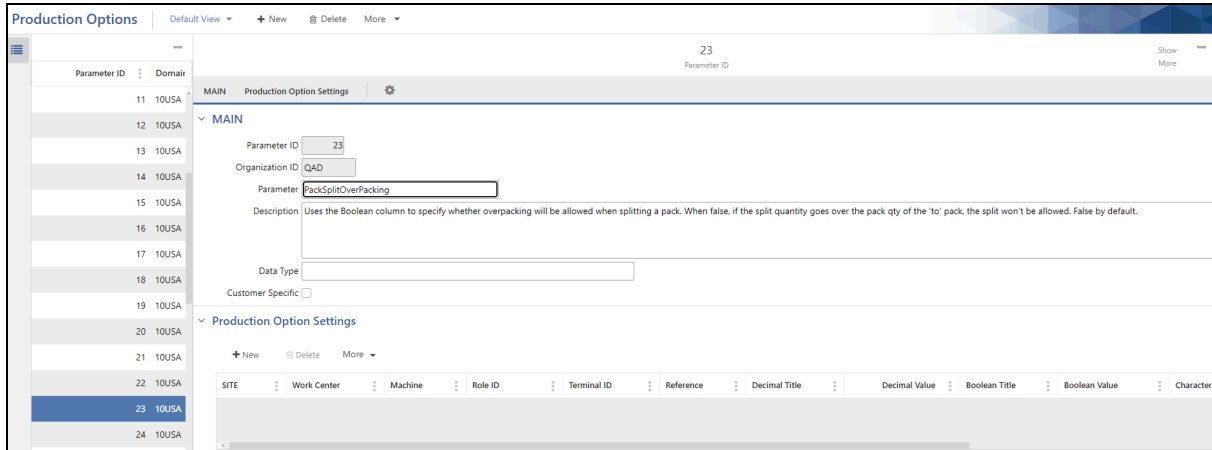
When entering a quantity that exceeds the standard pack quantity, verify the system immediately displays the message that overpacking functionality is disabled. The system does not allow you to perform the transaction (Submit button is disabled).

This screenshot shows the same 'Pack Split' interface as above, but with the 'Split Qty' field set to 6. A red error message box is displayed at the bottom left, stating: "Quantity exceeds standard pack quantity." The 'Submit' button is now disabled (greyed out). The 'Standard Pack Qty' field is also highlighted with a black box.

## Pack Merge Overpacking

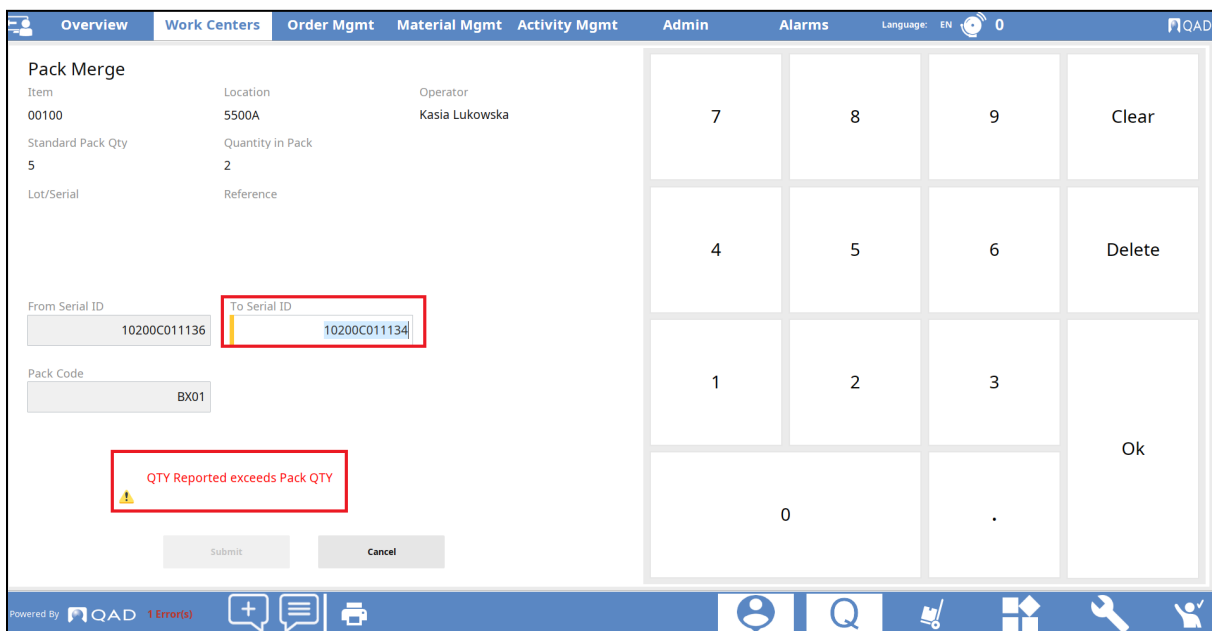
### Purpose

The Pack Merge Overpacking production option allows the user to specify whether overpacking is allowed when merging a pack.



**Where**

The production option is applied performing the Pack Merge transaction and you enter a total quantity that is greater than is the pack quantity of pack to which items are merged to.



**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, overpacking is allowed.
- If Boolean = 0, overpacking is NOT allowed. This is the default setting.

**Setup**

Field	Setting
Parameter ID	24

Parameter	PackMergeOverPacking
Description	Uses the Boolean column to specify whether overpacking will be allowed when merging a pack. When false (0), if the total quantity goes over the pack qty of the 'to' pack, the merge won't be allowed. False (0) is the default setting.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Pack Merge Overpacking, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value that determines whether overpacking is or is not allowed during the Pack Merge transaction: <ul style="list-style-type: none"> <li>● <b>1.</b> The overpacking is allowed.</li> <li>● <b>0.</b> Overpacking is NOT allowed.</li> </ul>

### Example

Perform the Pack Merge transaction and enter a total quantity greater than the pack quantity of the pack to which the items are merged to.

1. In **Production Options** (PackMergeOverPacking), enter Boolean Value = 0.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Inspection		2507469	Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
1020 Fabrication		2541573	52201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58775%	48	Equipment Down	Available		0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	105.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Stopped	Available		0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.120%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%	3		Available		0
5500-A Assembly Cell A	2	2534405	00100 Pin Assembly - Star	0.0%	1	Production	Available	43	0
5500-B Assembly Cell B		2502531	00100 Pin Assembly - Star	24.0909090909%	2	Open	Available		0
5500-C Assembly Cell C		2502478	00100 Pin Assembly - Star	200.0%	3		Available		0
5900 Heat Treat	2	2502608	50300H Star End Cap	0.0%	11		Available		0

4. Navigate to the Inventory Tab for this work center.

Overview | Work Centers | Order Mgmt | Material Mgmt | Activity Mgmt | Admin | Alarms | Language: EN | 1 | QAD

Work Centers | 1 Current Shift | 5500-A Work Center ID | Assembly Cell A Work Center Name | 43 (1) Operator ID

Production Orders | Order View | Equipment | **Inventory**

22 Backflush | 22 Receipt | 22 All | Search... | Summary | Detail | Refresh

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Action
00100	Pin Assembly - Star	5500A	161			BX01	Multiple	...
50201	Small Bushing	5500A	799			BX01	Multiple	...
50200	Large Bushing	5500A	-161	Multiple				...
62251	High Density PolyEthylen	5500A	4					...
50100	Molded Pin	5500A	-1	Multiple				...
C100	Component 1	5500A	-477					...
02001	Automotive Connector	5500A	-1					...
50300H	Star End Cap	5500A	-201					...

Show 0 Requests | Cancel Pending | Close All Complete

Powered By QAD 0 Error(s)

5. Select the Detail button to view details of the inventory at the selected work center.

Overview | Work Centers | Order Mgmt | Material Mgmt | Activity Mgmt | Admin | Alarms | Language: EN | 0 | QAD

Work Centers | 1 Current Shift | 5500-A Work Center ID | Assembly Cell A Work Center Name | Kasia Lukowska (1) Operator ID

Production Orders | Order View | Equipment | **Inventory**

15 Backflush | 15 Receipt | 15 All | Search... | Summary | **Detail** | Refresh

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	...
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	...
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	...
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	...
00100	Pin Assembly - Star	5500A	161						0	191	...
50100	Molded Pin	5500A	-1	2502473					0	0	...

Show 0 Requests | Cancel Pending | Close All Complete

Powered By QAD 1 Error(s)

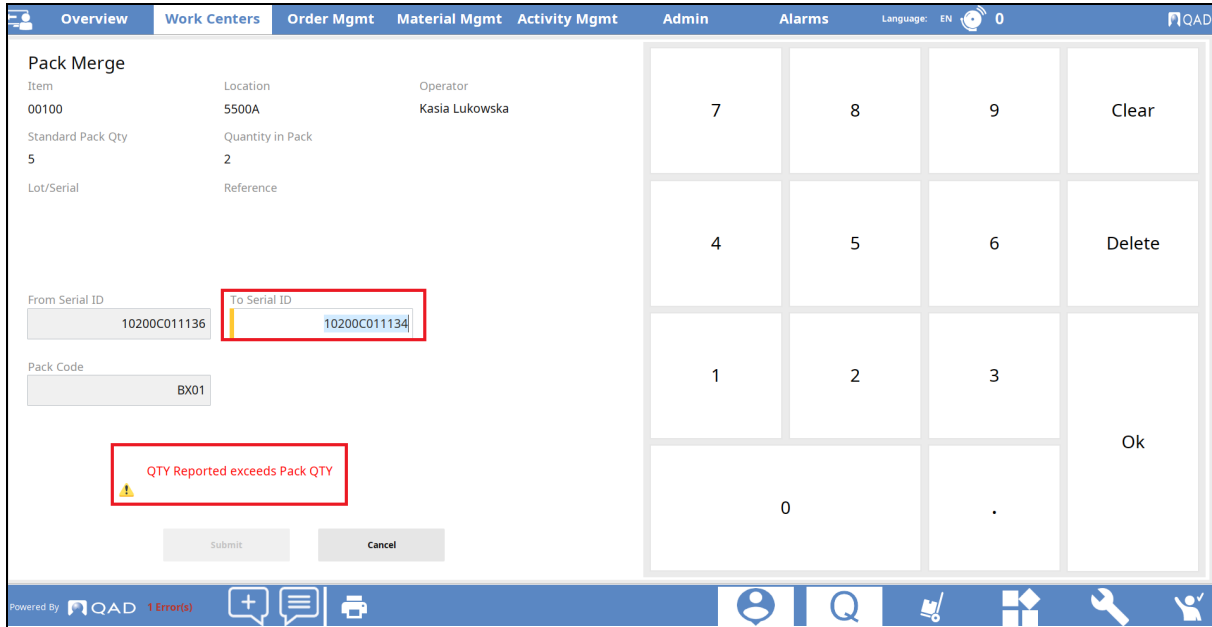
6. Initiate the action against the inventory by selecting the Action dots.

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	•••
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	•••
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	•••
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	•••
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	•••
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	•••
00100	Pin Assembly - Star	5500A	161						0	191	•••
50100	Molded Pin	5500A	-1	2502473					0	0	•••

7. Select the Pack Merge transaction.

Inventory Action
Select:
Build Pallet
Reprint Label
Pack Split
<b>Pack Merge</b>
Remove Pack
OK Cancel

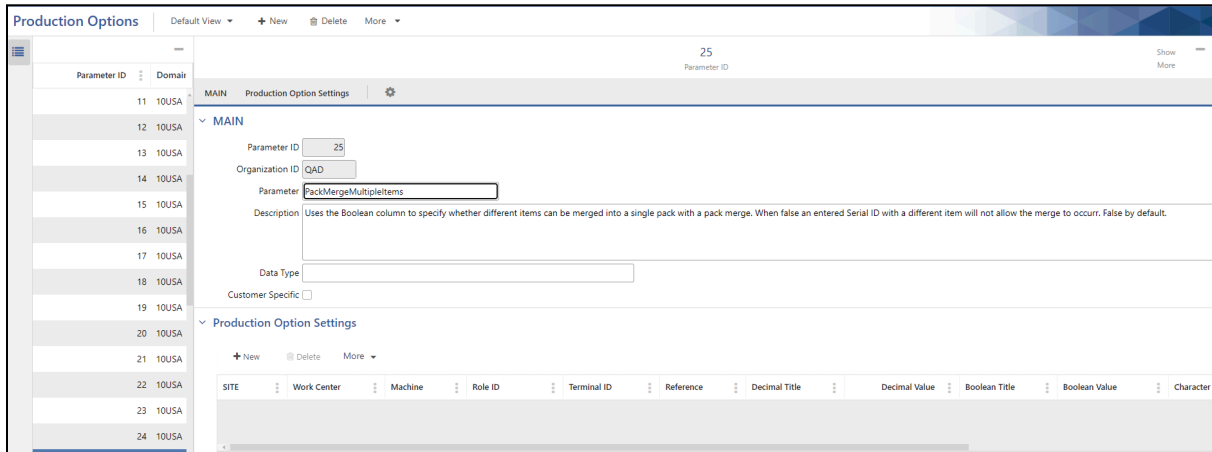
8. Enter the pack serial that is to be merged with a total quantity that is greater than the standard pack quantity. Verify the system immediately displays the message that overpacking functionality is disabled and that you are not allowed to perform the transaction (Submit button is disabled).



## Pack Merge Multiple Items

### Purpose

The Pack Merge Multiple Items production option allows the user to specify whether different items can be merged into a single pack using the Pack Merge transaction.



### Where

The production option is applied when using the Pack Merge transaction and you enter a serial that contains a different item than the item in the pack to which it is to be merged to.

**Pack Merge**

Item: 00100      Location: 5500A      Operator: Kasia Lukowska

Standard Pack Qty: 5      Quantity in Pack: 10

Lot/Serial:      Reference:

From Serial ID: 10200C011135      To Serial ID: 10200C011137

Pack Code: BX01

**QTY Reported exceeds Pack QTY  
To and from item are not the same**

Submit      Cancel

7      8      9      Clear

4      5      6      Delete

1      2      3

0      .      Ok

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## Setting

Enter the Boolean Value for this option:

- If Boolean = 1, packs with different items can be merged.
- If Boolean = 0, packs with different items cannot be merged. This is the default setting.

## Setup

Field	Setting
Parameter ID	25
Parameter	PackMergeMultipleItems
Description	Uses the Boolean column to specify whether different items can be merged into a single pack with a pack merge. When false an entered Serial ID with a different item will not allow the merge to occur. False by default.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Pack Merge Multiple Items, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value that determines whether you can use the Pack Merge transaction with packs containing different items: <ul style="list-style-type: none"> <li>• <b>1.</b> Packs with different items can be merged.</li> <li>• <b>0.</b> Packs with different items cannot be merged.</li> </ul>

## Example

Perform the Pack Merge transaction and enter a serial with a different item than the content of the pack to which it is merged.

1. In **Production Options** (PackMergeMultipleItems), enter Boolean Value = 0.
2. Log in to PE.

3. Log in to the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Inspection		2507469	Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
1020 Fabrication		2541573	S2201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58779%	48	Equipment Down	Available		0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	105.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Stopped	Available		0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.120%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.296666667%	3		Available		0
5500-A Assembly Cell A	2	2534405	00100 Pin Assembly - Star	0.0%	1	Production	Available	43	0
5500-B Assembly Cell B		2502531	00100 Pin Assembly - Star	24.0909090909%	2	Open	Available		0
5500-C Assembly Cell C		2502478	00100 Pin Assembly - Star	200.0%	3		Available		0
5900 Heat Treat	2	2502608	50300H Star End Cap	0.0%	11		Available		0

4. Navigate to the Inventory Tab of this work center.

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Action
00100	Pin Assembly - Star	5500A	161			BX01	Multiple	...
50201	Small Bushing	5500A	799			BX01	Multiple	...
50200	Large Bushing	5500A	-161	Multiple				...
62251	High Density PolyEthylene	5500A	4					...
50100	Molded Pin	5500A	-1	Multiple				...
C100	Component 1	5500A	-477					...
02001	Automotive Connector	5500A	-1					...
50300H	Star End Cap	5500A	-201					...

5. Select the Detail button to view details of the inventory at the selected work center.

# 91 QAD Production Execution - Setup Guide

The screenshot shows the QAD Production Execution interface. The top navigation bar includes Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The current view is 'Work Centers' for 'Assembly Cell A' (Work Center ID: 5500-A) and Operator ID: Kasia Lukowska (1). The 'Inventory' tab is selected, showing a table of items with columns: Item, Description, Location, Quantity, Lot/Serial, Reference, Pack Code, Serial ID, Serial Master, Qty In Pack, Std Pack Qty, and Action. The 'Detail' button in the top right of the table area is highlighted with a red box.

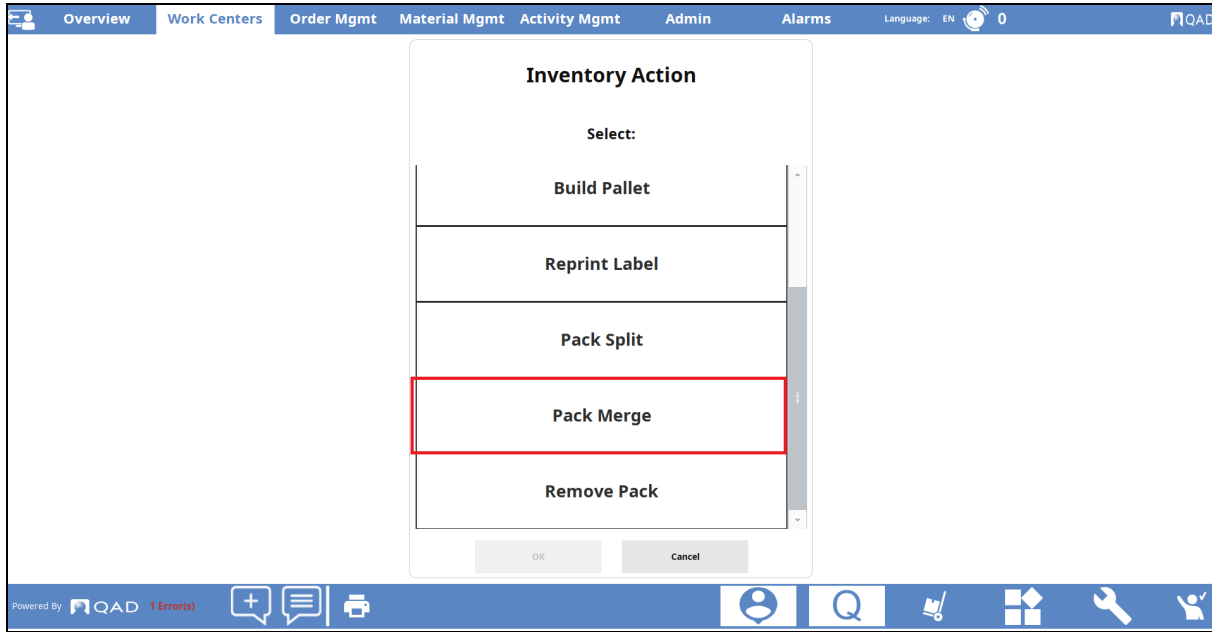
Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	...
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	...
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	...
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	...
00100	Pin Assembly - Star	5500A	161						0	191	...
50100	Molded Pin	5500A	-1	2502473					0	0	...

6. Initiate the action against the inventory by selecting the Action dots.

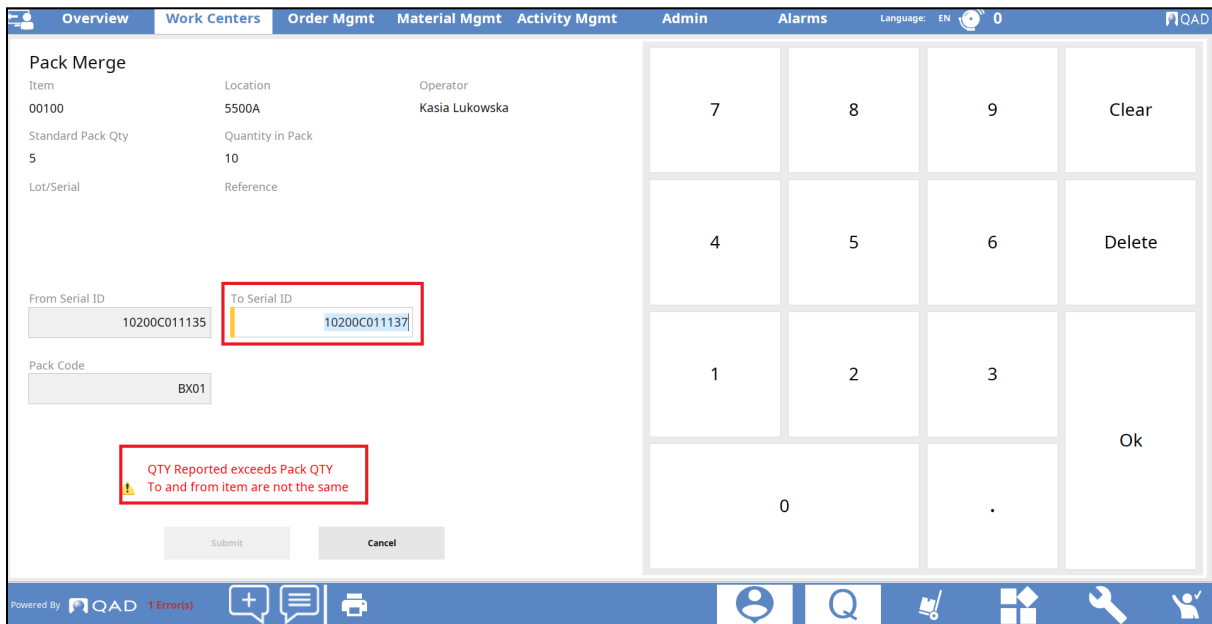
The screenshot shows the same QAD Production Execution interface as above. The 'Action' column for each row in the inventory table is highlighted with a red box, indicating that the user is about to initiate an action against the inventory.

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00100	Pin Assembly - Star	5500A	10			BX01	10200C011135	10200C011135	10	5	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C011134	10200C011134	10	5	...
00100	Pin Assembly - Star	5500A	21			BX01	10200C010991	10200C010991	21	10	...
00100	Pin Assembly - Star	5500A	10			BX01	10200C000010	10200C000010	10	100	...
00100	Pin Assembly - Star	5500A	40			BX01	10200C000009	10200C000009	40	100	...
00100	Pin Assembly - Star	5500A	100			BX01	10200C000008	10200C000008	100	100	...
00100	Pin Assembly - Star	5500A	161						0	191	...
50100	Molded Pin	5500A	-1	2502473					0	0	...

7. Select the Pack Merge transaction.



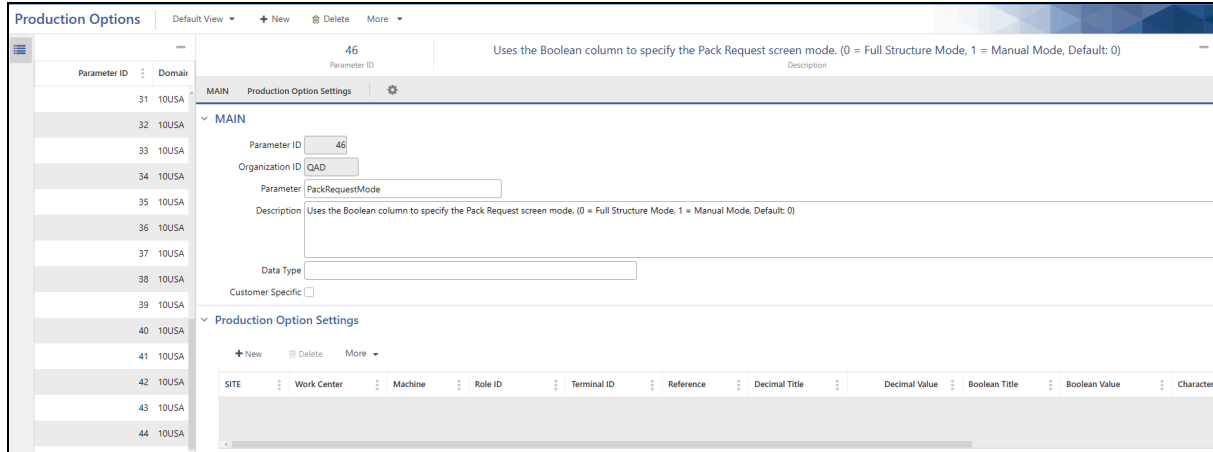
8. Enter the pack serials that are to be merged. Make sure to enter a serial in the To Serial ID field that contains different items than the serial in the From Serial ID field. Verify the system immediately displays the message that the items in the From and To serials are not the same and that you are not allowed to perform the transaction (Submit button is disabled).



## Pack Request Mode

### Purpose

The Pack Request Mode production option allows the user to specify the Pack Request screen mode. The user is able to set up either the full structure mode or a manual one.



**Where**

The production option is applied to the structure of the Pack Request Screen.

**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, Manual Mode is set up.
- If Boolean = 0, Full Structure Mode is set up. This is the default setting.

**Setup**

Field	Setting
Parameter ID	46
Parameter	PackRequestMode
Description	Uses the Boolean column to specify the Pack Request screen mode. (0 = Full Structure Mode, 1 = Manual Mode, Default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the structure of the Pack Request screen, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value which determines the structure of the Pack Request screen: <ul style="list-style-type: none"> <li>● <b>1.</b> Manual Mode is set up.</li> <li>● <b>0.</b> Full Structure Mode is set up.</li> </ul>

**Example**

Follow these steps to set up the structure of the Pack Request screen:

1. In **Production Options** (PackRequestMode), enter Boolean Value = 0 (Full Structure Mode).
2. Log in to PE.
3. Log in to the work center against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	1	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Weaving BlockX - Weaving				0.0%	0		Available		0
Extruder BlockX - Extrusion	1	2507892 (3)	Tape Tape for Rolls - BlockX	100.0%	8	Production	Available		0

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4. Select the Material Action “dots” button for the production order.

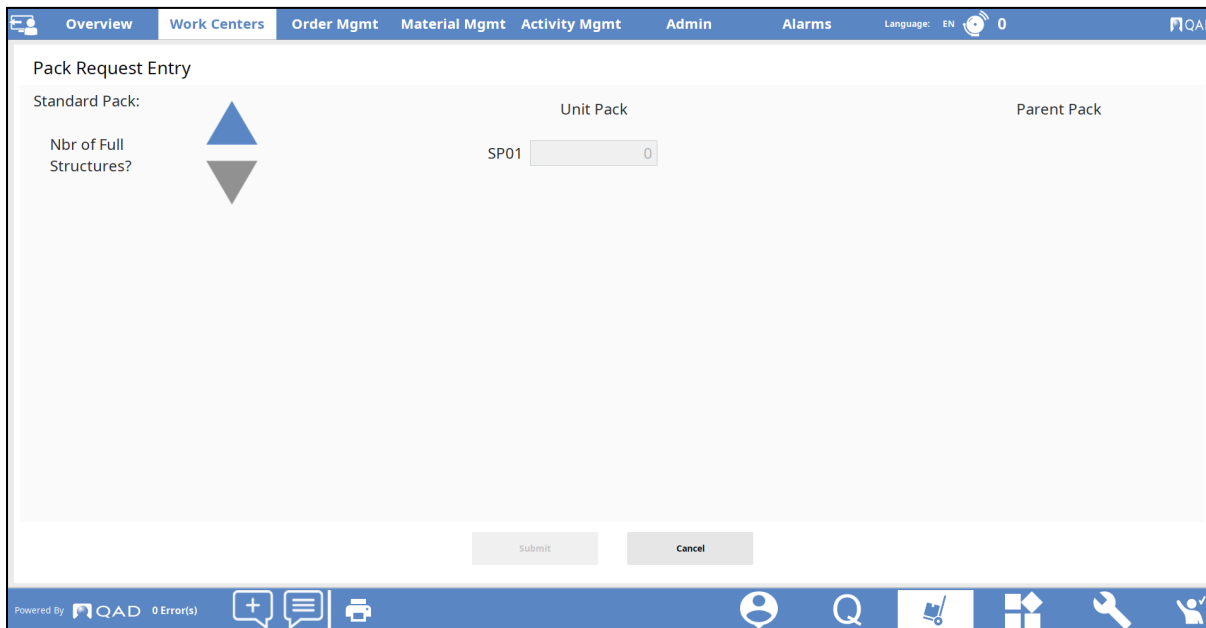
Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	1	QAD						
Work Centers		2 Current Shift	Extruder Work Center ID	BlockX - Extrusion Work Center Name	Operator ID										
Production Orders		Order View	Equipment	Inventory	Material Request										
5 Open		3 Active		1 Rework						Search for an Order ID...					
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2507892-10	●		Tape Tape for Rolls - BlockX	Production	■	✎	⋮	19/8/2020	100%	0.1	50	0	10		25/1/2021
2519188-10			Tape Tape for Rolls - BlockX	Production	■	✎	⋮	17/12/2020	100%	0.1	50	50	5		25/1/2021
2519189-10			Tape Tape for Rolls - BlockX	Production	■	✎	⋮	17/12/2020	100%	0.1	100	100	10		17/12/2020

Powered By QAD 0 Error(s)

5. Select Pack Request.



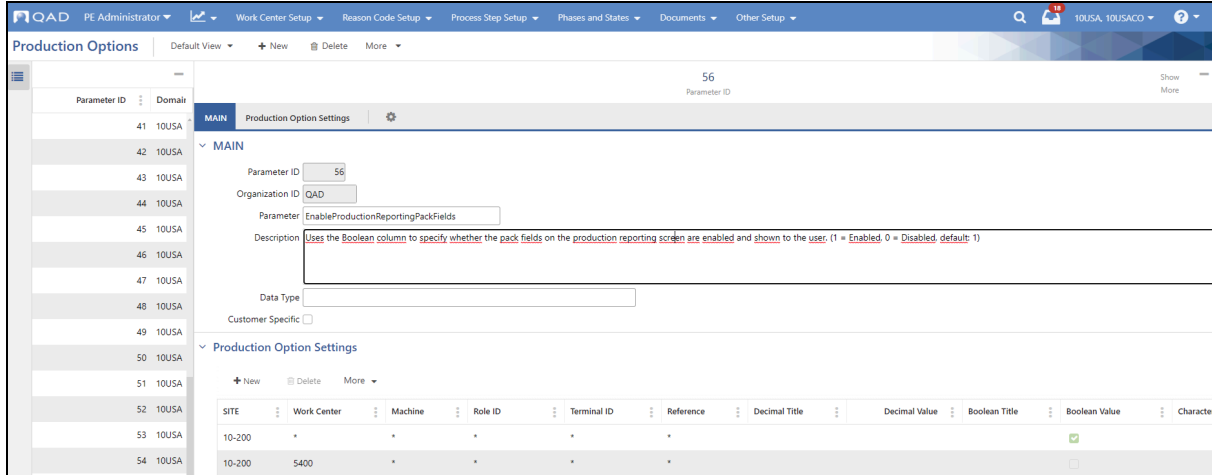
6. Verify the Pack Request screen is displayed in the Full Structure Mode, as shown below.



## Enable Production Reporting Pack Fields

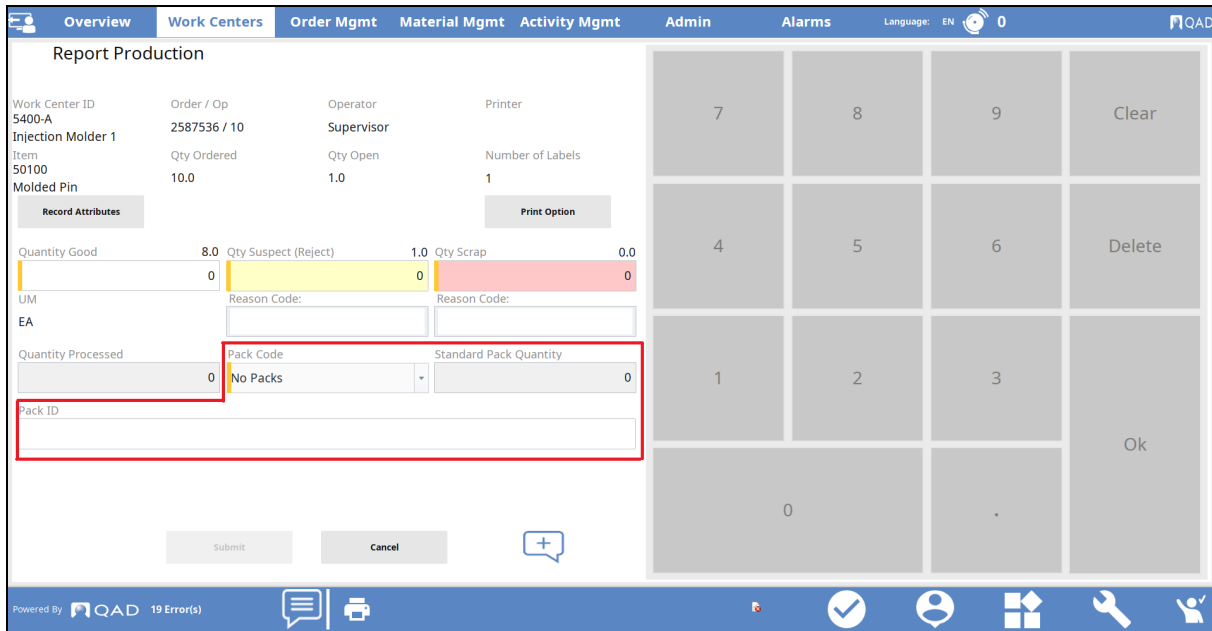
### Purpose

The Enable Production Reporting Pack Fields production option allows the user to specify whether the pack fields on the production reporting screen are enabled and displayed for the user.



**Where**

The production option is applied to the Production Reporting screen.



**Setting**

Enter the Boolean Value for this option to specify whether the pack fields are to enabled and viewable to the user:

- If Boolean =1, then the Pack fields on the production reporting screen are enabled. This is the default setting.
- If Boolean = 0, then the Pack fields on the production reporting screen are disabled

**Setup**

Field	Setting
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Parameter ID	56
Parameter	EnableProductionReportingPackFields
Description	Uses the Boolean column to specify whether the pack fields on the production reporting screen are enabled and shown to the user. (1 = Enabled, 0 = Disabled, default: 1)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Enable Production Reporting Pack Fields Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value which specifies whether the pack fields are to enabled and viewable to the user: <ul style="list-style-type: none"> <li>● <b>1.</b> Pack fields on the production reporting screen are enabled</li> <li>● <b>0.</b> Pack fields on the production reporting screen are disabled</li> </ul>

### Example

Navigate to the Production Reporting screen and validate whether the Pack Fields are enabled or disabled.

1. In **Production Options** (EnableProductionReportingPackFields), enter Boolean Value = 1.
2. Log into Production Execution.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (7)	50100 Molded Pin	3.0%		51 Open	Available	Supervisor	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%		30 Open	Available	Supervisor	0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%		10 Open	Available		0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%		16 Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%		6 Open	Available		0
5900 Heat Treat				0.0%		0	Available		0

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4. Navigate to the Production Orders Screen and select Production Order to perform production report.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583996-10				50100	Setup				10/9/2020	10/9/2020		100	15	10			
2583998-10				50100	Setup				11/5/2020	11/5/2020		100	20	19			
2584019-10				50100	Setup				2/18/2021	2/18/2021		100	50	50			
2584022-10				50100	Setup				2/23/2021	2/23/2021		100	50	38			
2587536-10				50100	Production				3/2/2021	3/2/2021	0.4%	100	10	1	2		4/9/2021
2587544-10				50100	Production				3/10/2021	3/10/2021		100	10	10			
2583995-10				50100	Equip Stopped				10/7/2020	10/7/2020	144.58%	100	10	0			

5. Navigate to the Production Reporting Screen.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2587536-10	50100 Molded Pin	Production				3/2/2021	0.4%	100	1	8	1	0

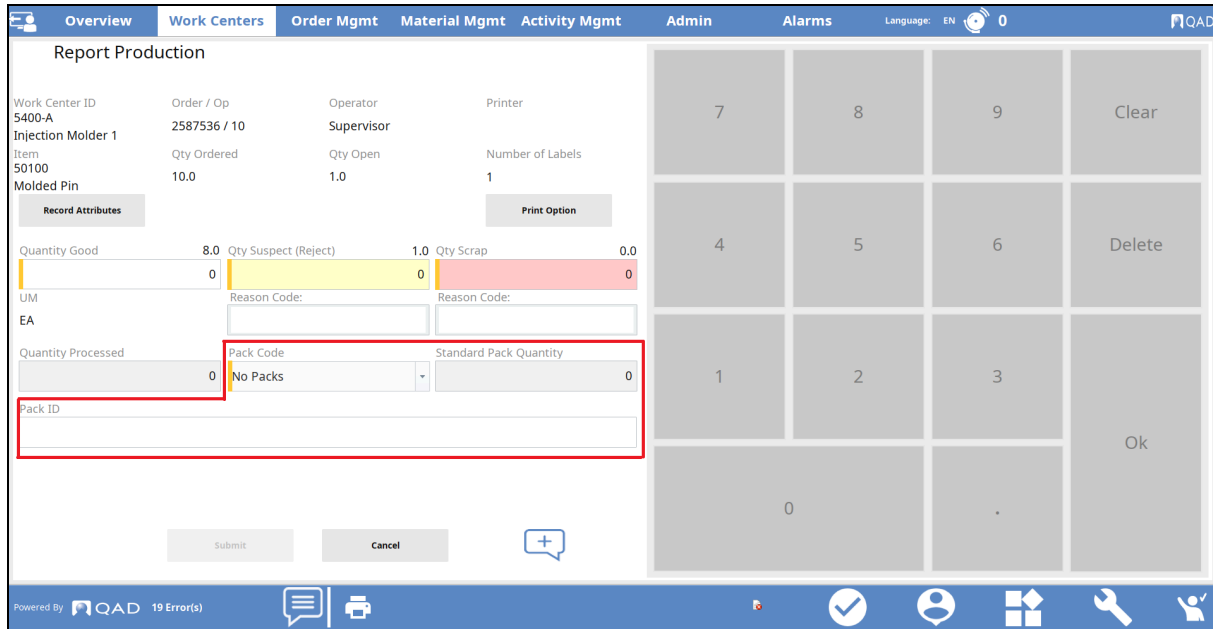
  

Seq	StepName	Status	Time Start/Stop	Action	Time	Employee
1	Visual Insp-100%					
2	Visual Insp-hourly	Pending	-17:14			
3	OpenWebsite	Pending				

Description	Qty Produced	Reason	User...	Time
Up		Operational	supv1	4/9/2021 10:00...
Down state ended		Operational	supv1	4/9/2021 10:00...
User Supervisor logged in on workcenter			supv1	4/9/2021 10:00...

6. Verify that the Pack Fields are displayed on the Production Reporting Screen per setup.



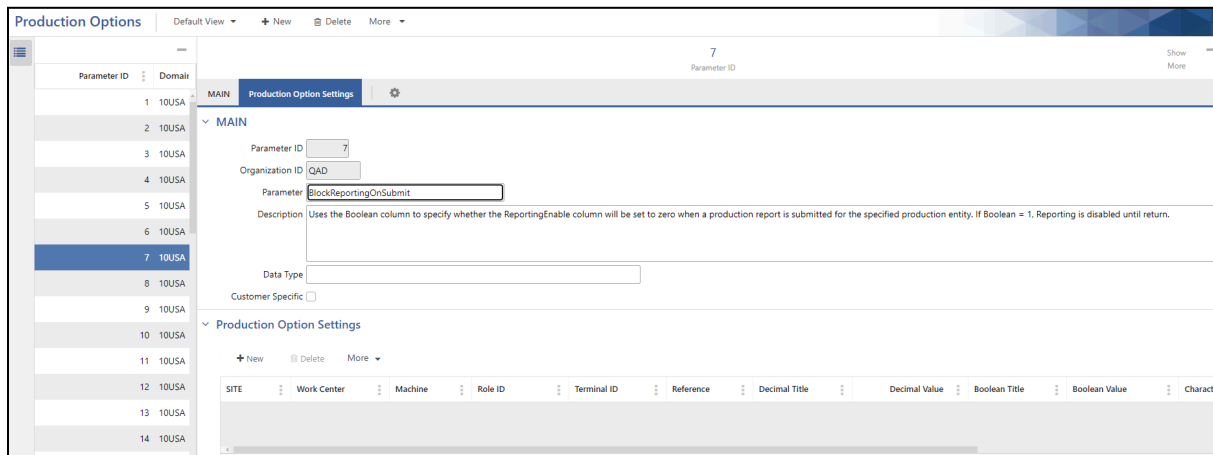
## Reporting Category

The following production options are related to production reporting.

### Block Reporting on Submit

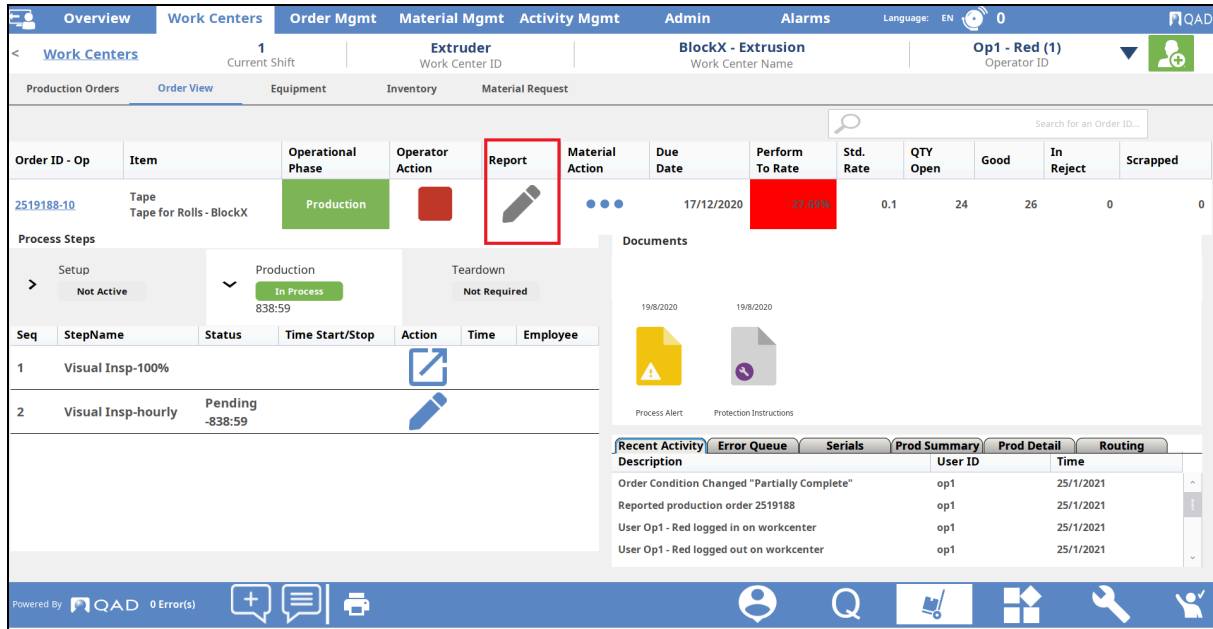
#### Purpose

The Block Reporting on Submit production option allows the user to specify whether reporting of production is disabled after submitting the production report for the specified production entity.



#### Where

The production option is applied to the production Report (Pencil) button on the Production Order and/or Order View Screen.



### Setting

Enter the Boolean Value for this option:

- If Boolean =1, the Report (Pencil) button is disabled after submitting the production report.
- If Boolean = 0, the Report (Pencil) button is NOT disabled after submitting the production report.

### Setup

Field	Setting
Parameter ID	7
Parameter	BlockReportingOnSubmit
Description	Uses the Boolean column to specify whether the ReportingEnable column will be set to zero when a production report is submitted for the specified production entity. If Boolean = 1, Reporting is disabled until return.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Block Reporting on Submit Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value which determines whether the Report (Pencil) button is disabled after submitting the production report: <ul style="list-style-type: none"> <li>• 1. Report (Pencil) button is disabled after submitting the production report.</li> <li>• 0. Report (Pencil) button is NOT be disabled after submitting the production report.</li> </ul>

### Example

Follow these steps to verify if the Report (Pencil) button is disabled after submitting the production report:

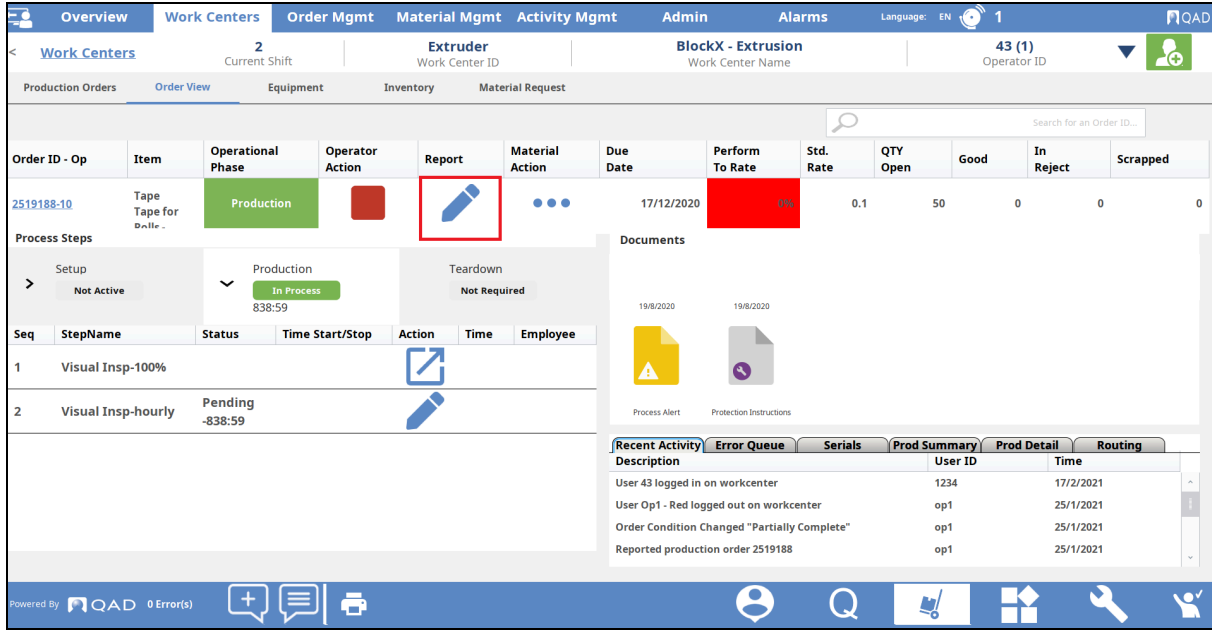
1. In **Production Options** (BlockReportingOnSubmit), enter Boolean Value = 1 (Disable reporting of production after submission).
2. Log in to PE.
3. Log in to the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Weaving BlockX - Weaving				0.0%	0		Available		0
Extruder BlockX - Extrusion	1	2507892 (3)	Tape Tape for Rolls - BlockX	100.0%	8	Production	Available		0

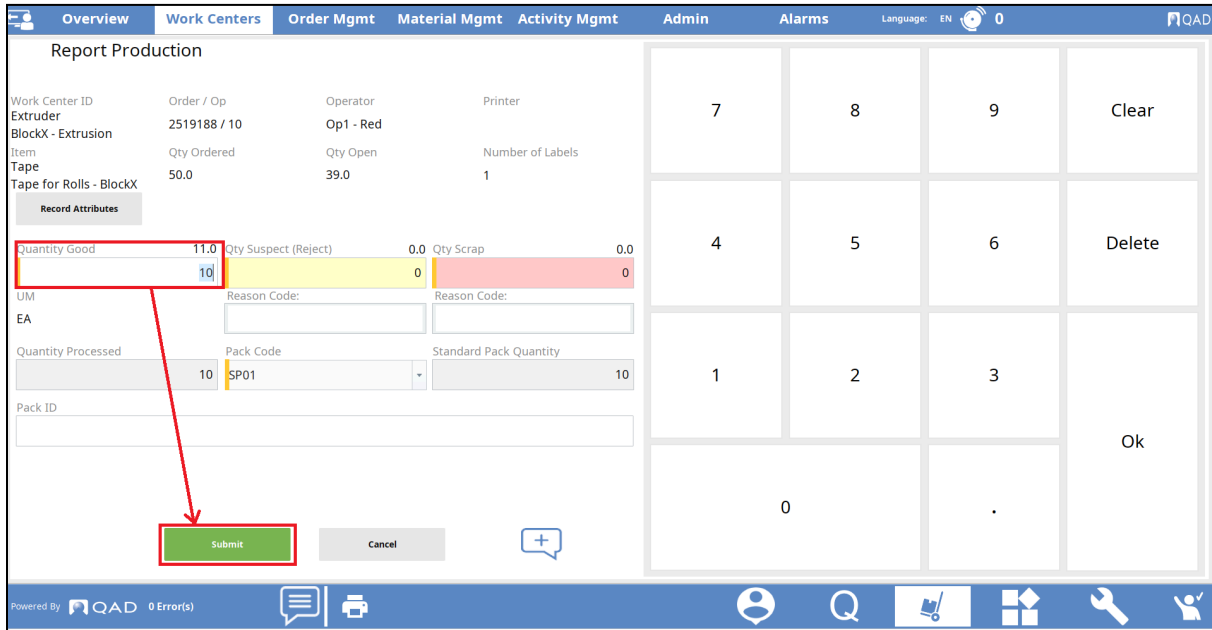
4. Select the production order ID that you will report production for.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2507892-10			Tape Tape for Rolls - BlockX	Production				19/8/2020		0.1	50	0			
2519188-10			Tape Tape for Rolls - BlockX	Production				17/12/2020	111.73%	0.1	50	39	1		25/1/2021
2519189-10			Tape Tape for Rolls - BlockX	Production				17/12/2020	100%	0.1	100	100	10		17/12/2020

5. In the Order View screen, select the Report (Pencil) button to report production against selected production order.



6. Report production for selected production order.



- After submitting the production report, verify the Report (Pencil) button is disabled. This confirms that users are not able to report the production against the production order where the production report was already submitted.

The screenshot shows the QAD Production Execution interface. The top navigation bar includes tabs for Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The main area is divided into several sections:

- Order Information:** Order ID - Op: 2519188-10, Item: Tape for Rolls - BlockX, Operational Phase: Production, Operator Action: Report (highlighted in red), Material Action, Due Date: 17/12/2020, Perform To Rate: 27.00%, Std. Rate, QTY Open: 0.1, Good: 24, In Reject: 26, Scrapped: 0.
- Process Steps:** A table showing steps for Setup, Production, and Teardown. Step 1 is 'Visual Insp-100%' and Step 2 is 'Visual Insp-hourly' with a status of 'Pending'.
- Documents:** A section for documents, including 'Process Alert' and 'Production Instructions'.
- Recent Activity:** A table showing recent activities, including 'Order Condition Changed "Partially Complete"', 'Reported production order 2519188', 'User Op1 - Red logged in on workcenter', and 'User Op1 - Red logged out on workcenter'.

## Prevent Overreporting Order

### Purpose

The Prevent Overreporting Order production option allows the user to set up the warning and error threshold percentages when reporting production that is greater than the total quantity on the production order.

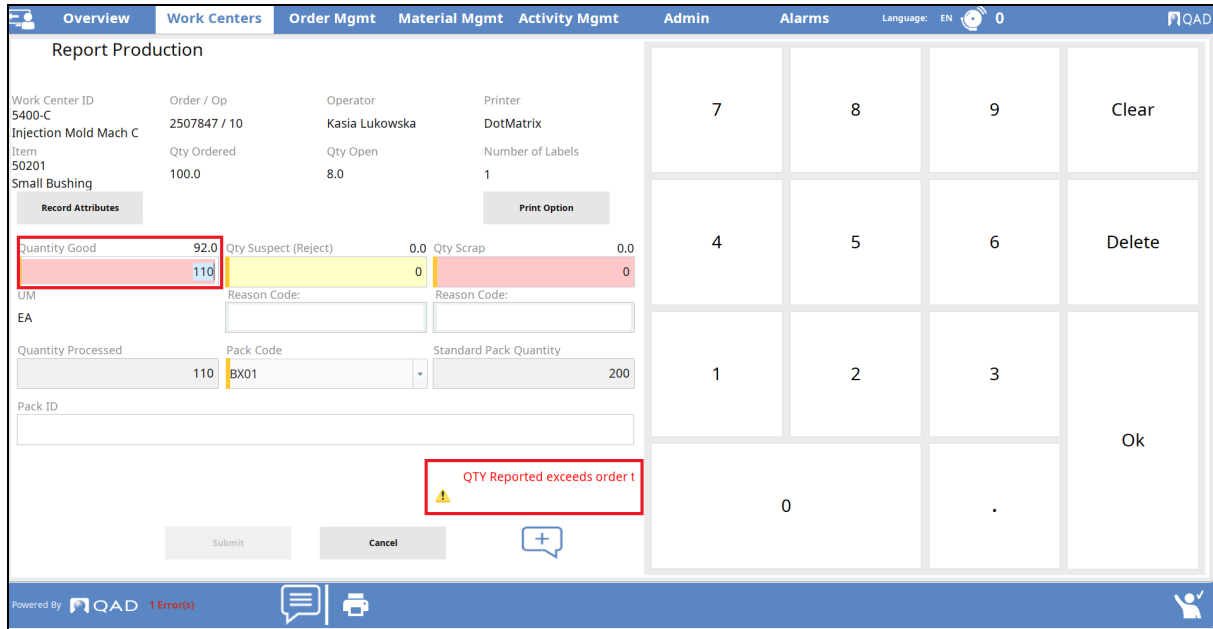
- The warning percentage triggers a yellow colored warning message, which informs the user about overreporting against the total production order quantity.
- The error percentage triggers the red colored error message, which blocks the user from reporting production and informs them about exceeding the quantity against the production order.

The screenshot shows the QAD Production Options configuration screen for parameter 10. The main area displays the 'Production Option Settings' for the parameter 'PreventOverreportingOrder'. The description states: 'Uses the char column to provide two values separated by semicolon (;) representing the warning threshold and error threshold percentages for reporting production over the order total. A negative value (-1) will be ignored.' The data type is set to 'Character'. The 'Customer Specific' checkbox is unchecked.

SITE	Work Center	Machine	Role ID	Terminal ID	Reference	Decimal Title	Decimal Value	Boolean Title	Boolean Value	Character

### Where

The production option is applied to the Report Production Screen when you report production that is greater than the total quantity on the production order and it exceeds the specified threshold percentage.



**Setting**

Enter the two Character Values, each separated by a semicolon (;). The first value represents the warning threshold percentage and the second value represents the error threshold percentage: *<warning threshold percentage>;<error threshold percentage>*.

The following is an example when the Character Value is set to “1;2”:

- A warning message is displayed when the total reported production quantity is more than 1%.
- An error message is displayed when the total reported production quantity is more than 2%.

**Note:** Enter positive values only. Negative values (-1) are ignored.

**Setup**

Field	Setting
Parameter ID	10
Parameter	PreventOverreportingOrder
Description	Uses the char column to provide two values separated by semicolon (;) representing the warning threshold and error threshold percentages for reporting production over the order total. A negative value (-1) will be ignored.
Character Title	Enter the setup details associated with the Character Value. The Character value is critical for the Prevent Overreporting Order Option, therefore entering the instructions is useful.
Character Value	Enter the text-based parameters to be used against this production option and set up the control factor as desired. For Prevent Overreporting Order Option, set up two values separated by the semicolon (;). The first value represents the warning threshold percentage and the second value represents the error threshold percentage: <i>&lt;warning threshold percentage&gt;;&lt;error threshold percentage&gt;</i> .

**Example**

Follow these steps to report production with the total quantity of production order greater than the threshold percentage for the production order total quantity:

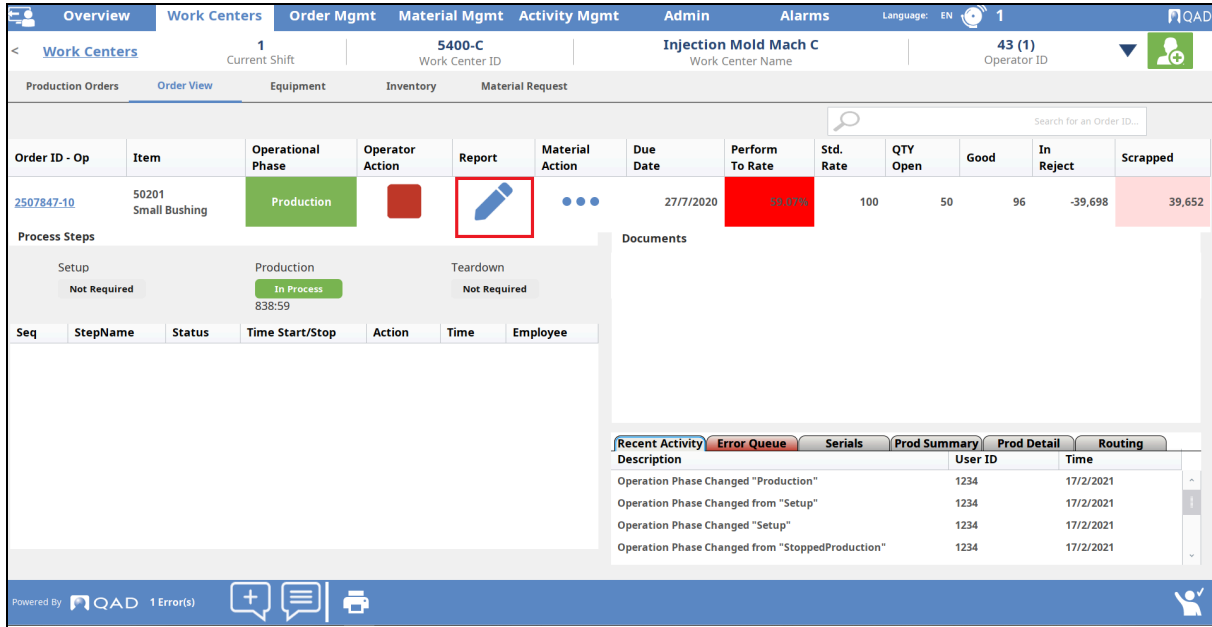
1. In **Production Options** (PreventOverreportingOrder), enter Character Value = 1.1;1.2.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	33.954545454545%	5	Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.181818181818%	5	Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.45454545454545%	5	Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
1020 Fabrication		2541573	52201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58773%	48	Equipment Down	Available		0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	105.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Production	Available	43	0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.123%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.296666666667%	3		Available		0
5500-A	2	2534405	00100	0.0%	1	Production	Available		0

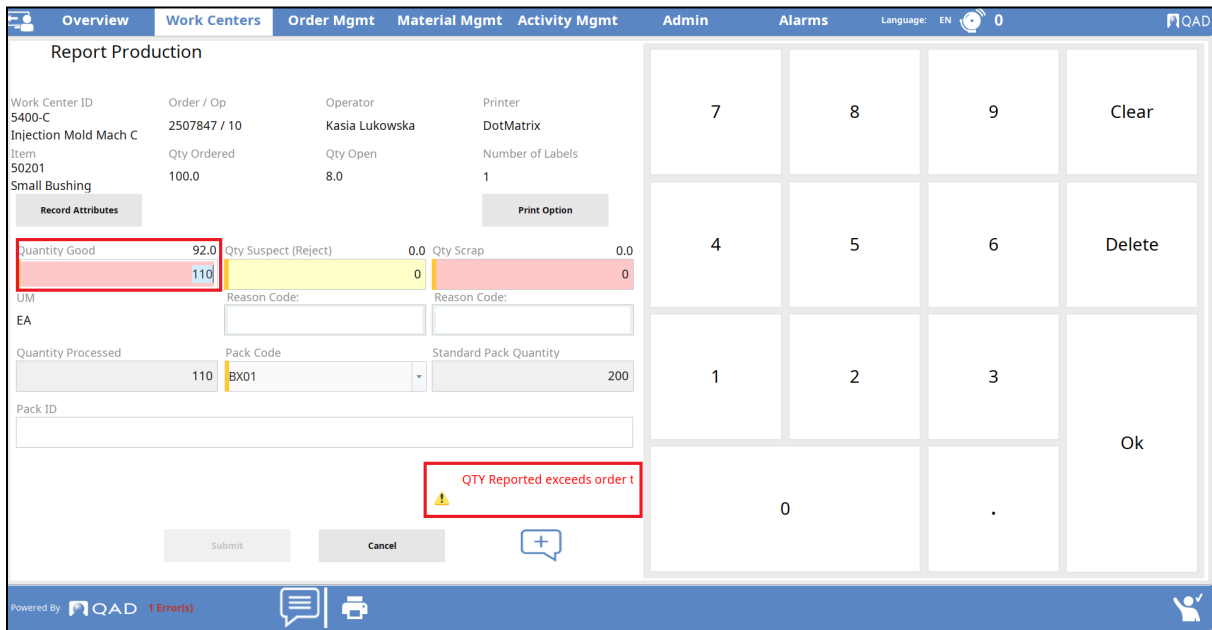
4. Navigate to the production order you would like to report against.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2502492-10	●		50200 Large Bushing	Production	■	✎	●●●	25/10/2019	0.24%	100	1,000	620		5	17/12/2020
2502579-10	●		50200 Large Bushing	Production	■	✎	●●●	25/10/2019		100	100	5			
2507847-10			50201 Small Bushing	Production	■	✎	●●●	27/7/2020	50.00%	100	100	50		1	9/2/2021
2502479-10			50100 Molded Pin	Production	■	✎	●●●	25/10/2019	0.0%	100	1	-23			

5. Select the Report (Pencil) button to navigate to the Report Production screen.



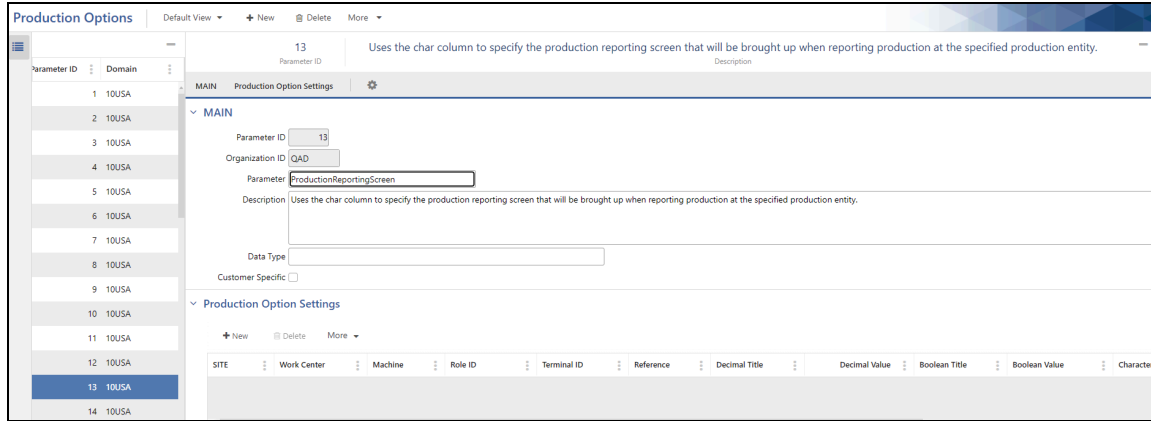
- Report production with a quantity greater than the total quantity on the production order. Verify the warning message (“Quantity Reported exceeds Order Qty”) is displayed and the submit button is disabled.



## Production Reporting Screen

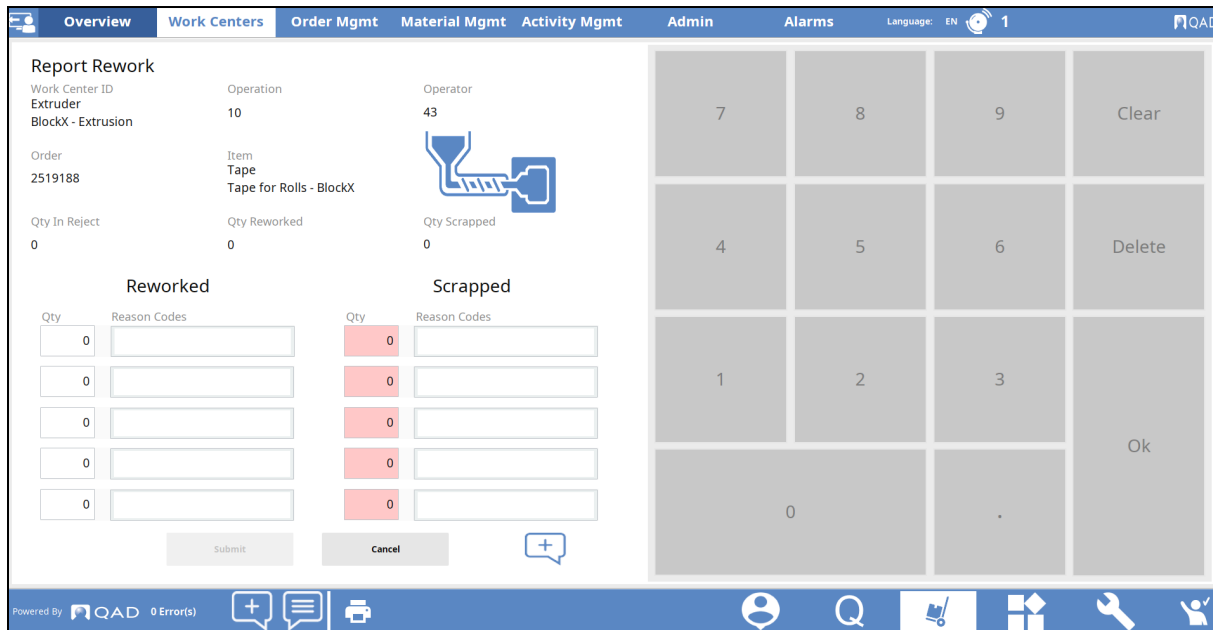
### Purpose

The Production Reporting Screen production option allows the user to specify the structure of the production reporting screen that is displayed when reporting production at the specified production entity.



### Where

The production option is applied to the Report Production screen.



### Setting

Specify what the Report Production screen displays and what the user can report by selecting one of the the following options in the Character Value field:

- **Popups/Production Reports/Report Missing In (Missing In Screen).** The Report Production screen allows users to report against the “missing in quantity” of a produced item
- **Popups/Production Reports/Report Missing Out (Missing Out Screen).** The Report Production screen allows users to report against the “missing out quantity” of a produced item
- **Popups/Production Reports/Report Reject (Reject Screen).** The Report Production screen allows users to report against the rejected quantity of produced item
- **Popups/Production Reports/Report Rework (Rework Screen).** The Report Production screen allows users to report against the reworked quantity of a produced item
- **Popups/Production Reporting (Good/Scrap/Reject).** The Report Production screen allows users to report against the good/scrapped/rejected quantity of a produced item.
- **Popups/Production Reporting (Good only).** The Report Production screen allows users to

report only against the good quantity of a produced item.

## Setup

Field	Setting
Parameter ID	13
Parameter	ProductionReportingScreen
Description	Uses the char column to specify the production reporting screen that will be brought up when reporting production at the specified production entity.
Character Title	Enter the setup details associated with the Character Value. The Character value is critical for the Production Reporting Screen Option, therefore entering the instructions is useful.
Character Value	<p>Enter the text-based parameters to be used against this production option and set up the control factor as desired. For Production Reporting Screen Option setup one of the following options:</p> <ul style="list-style-type: none"> <li>● <b>Popups/Production Reports/Report Missing In (Missing In Screen).</b> The Report Production screen allows users to report against the “missing in quantity” of a produced item.</li> <li>● <b>Popups/Production Reports/Report Missing Out (Missing Out Screen).</b> The Report Production screen allows users to report against the “missing out quantity” of a produced item.</li> <li>● <b>Popups/Production Reports/Report Reject (Reject Screen).</b> The Report Production screen allows users to report against the rejected quantity of produced item.</li> <li>● <b>Popups/Production Reports/Report Rework (Rework Screen).</b> The Report Production screen allows users to report against the reworked quantity of a produced item.</li> <li>● <b>Popups/Production Reporting (Good/Scrap/Reject).</b> The Report Production screen allows users to report against the good/scrapped/rejected quantity of a produced item.</li> <li>● <b>Popups/Production Reporting (Good only).</b> The Report Production screen allows users to report only against the good quantity of a produced item.</li> </ul>

## Example

Navigate to the Report Production screen and verify the screen is structured according to the Character Value setting:

1. In Production Options (ProductionReportingScreen), enter Character Value = Popups/Production Reports/Report Rework.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
Weaving BlockX - Weaving				0.0%	0		Available		0
Extruder BlockX - Extrusion	1	2507892 (3)	Tape Tape for Rolls - BlockX	100.0%	8	Production	Available		0

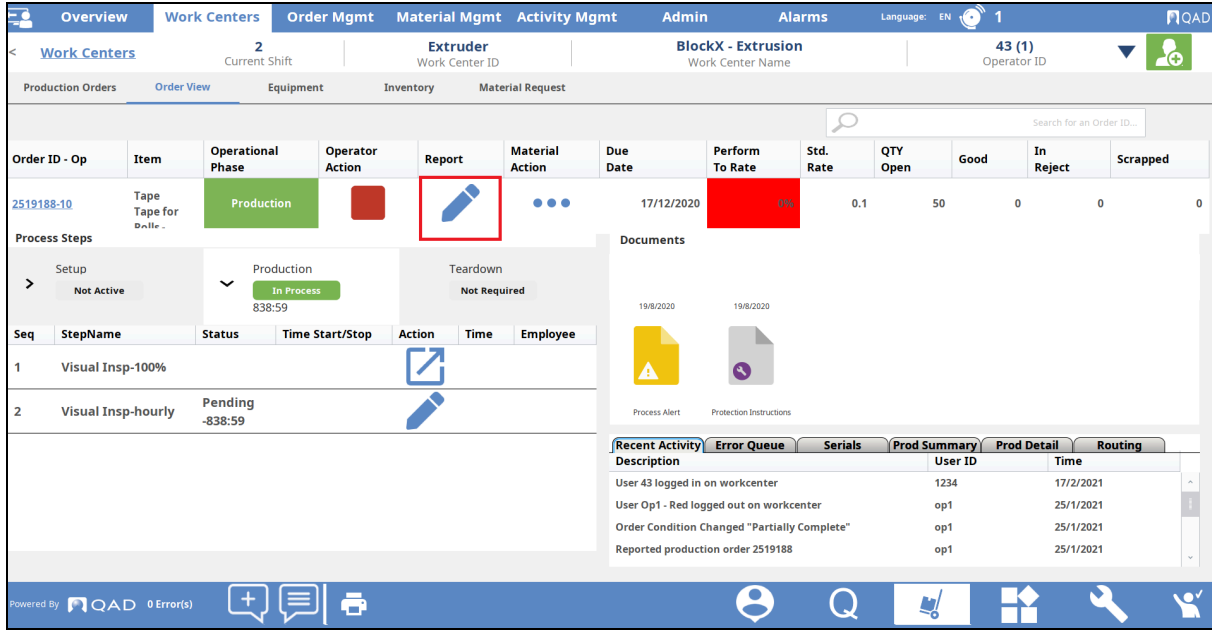
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4. Navigate to the production order that you will report production against.

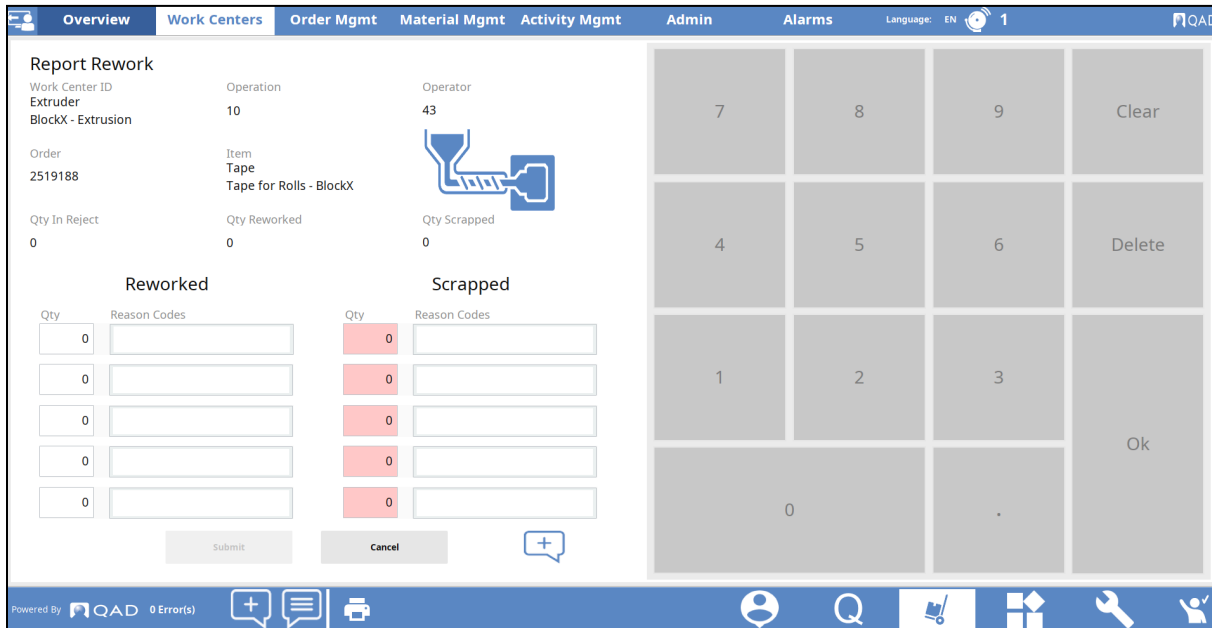
Production Orders		Order View	Equipment	Inventory	Material Request										
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2507892-10	●		Tape Tape for Rolls - BlockX	Production	■		●●●	19/8/2020		0.1	50	0			
2519188-10			Tape Tape for Rolls - BlockX	Production	■		●●●	17/12/2020	11.23%	0.1	50	39	1	25/1/2021	
2519189-10			Tape Tape for Rolls - BlockX	Production	■		●●●	17/12/2020	0%	0.1	100	100	10	17/12/2020	

Powered By QAD 0 Error(s)

5. Navigate to the Report Production screen by selecting the Pencil button.



6. Verify the Report Production screen is set up to report reworked items.



### Change Order State Global

This is an obsolete Production Option. Not in use anymore.

### Scrap Reject Alert Order Rule

#### Purpose

The Scrap Reject Alert Order Rule production option allows the user to specify a threshold percentage of the total production order quantity at which the reported scrap and/or reject quantity triggers one of the banner requests.

## Where

The production option is applied to the Report Production screen when you report scrap and/or reject item quantities.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2507608-20	50100 Molded Pin	Production				2/9/2020	100%	10	-5	2	-1	14

## Setting

Enter the Decimal, Integer and Character Values for this option:

- **Decimal Value.** Specifies the threshold percentage of the total production order quantity at which the reported scrap/reject quantity rule is broken.
- **Integer Value.** Specifies which quantities count toward the rule of reporting the scrap/reject items. Choose from the following options:
  - **Integer = 0 (Scrap).** The entered threshold percentage is applied against the reported Scrap quantity.
  - **Integer = 1 (Reject).** The entered threshold percentage is applied against the reported Reject quantity.
  - **Integer = 2 (Scrap & Reject).** The entered threshold percentage is applied against the reported Scrap and Reject quantities.

- **Character Value.** Specifies the type of personnel that is requested. Choose from the following options:
  - Quality
  - Materials
  - Fork Truck
  - Maintenance
  - Supervisor

**Setup**

Field	Setting
Parameter ID	29
Parameter	ScrapRejectAlertOrderRule
Description	Uses Dec field to specify threshold percentage of order total when the scrap/reject rule is broken. Int field is used to specify what counts toward the rule: scrap(0), reject(1), both(2). Char field is used to set request type (ex. Quality)
Decimal Title	Enter the setup details associated with the Decimal Value. For Scrap Reject Alert Order Rule Option, the Decimal Value is critical, therefore entering instructions is useful.
Decimal Value	Enter the decimal value to set up the control factor. For Scrap Reject Alert Order Rule Option, enter the threshold percentage number at which the rule of reporting scrap and/or reject quantities is broken.
Character Title	Enter the setup details associated with the Character Value. For Scrap Reject Alert Order Rule Option, the Character Value is critical, therefore entering instructions is useful.
Character Value	<p>Enter the text-based parameters to be used against this production option and set up the control factor as desired. For Scrap Reject Alert Order Rule Option, specify the type of personnel that is requested. Select from the following options:</p> <ul style="list-style-type: none"> <li>● Quality</li> <li>● Materials</li> <li>● Fork truck</li> <li>● Maintenance</li> <li>● Supervisor</li> </ul>
Integer Title	Enter the setup details associated with the Integer Value. For Scrap Reject Alert Order Rule Option, the Integer Value is critical, therefore entering instruction is useful.
Integer Value	<p>Enter the integer value to set up the control factor as desired. Following are the available options for Scrap Reject Alert Order Rule Option:</p> <ul style="list-style-type: none"> <li>● <b>Integer = 0 (Scrap).</b> The entered threshold percentage is applied against reported Scrap quantity.</li> <li>● <b>Integer = 1 (Reject).</b> The entered threshold percentage is applied against the reported Reject quantity.</li> <li>● <b>Integer = 2 (Scrap &amp; Reject).</b> The entered threshold percentage is applied against the reported Scrap and Reject quantities.</li> </ul>

**Example**

Follow these steps to report production against scrap and/or reject quantities and to verify the system functions according to the Decimal, Character, and Integer Value settings:

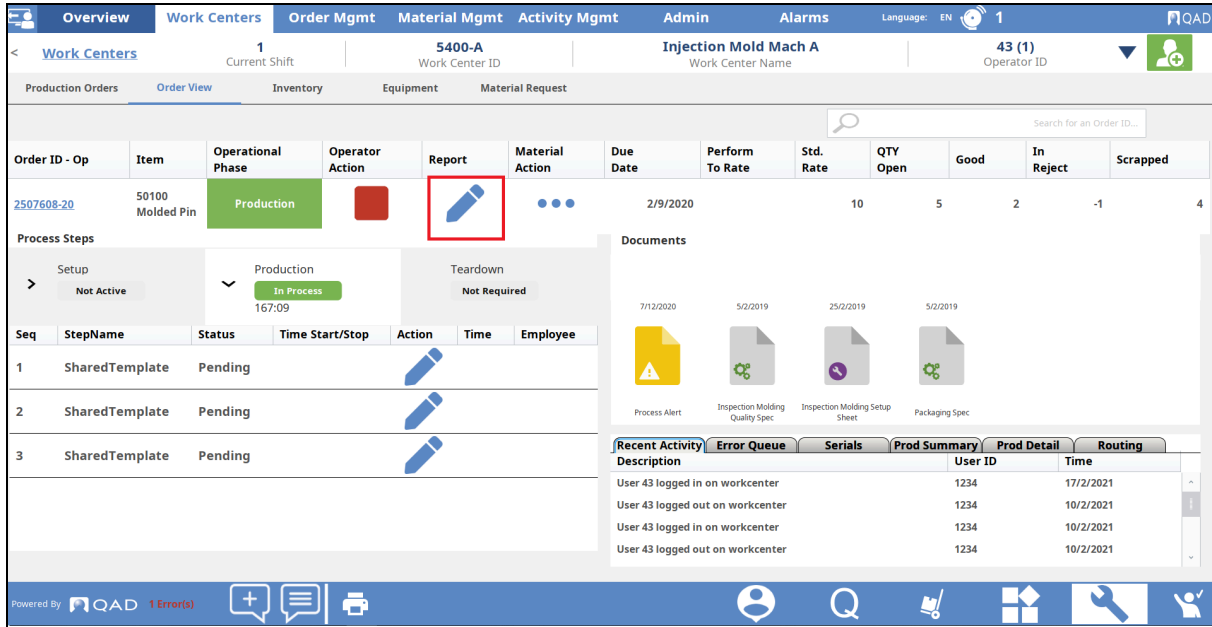
1. In **Production Options** (ScrapRejectAlertOrderRule), set the Decimal, Character, and Integer Values to the following:
  - Decimal Value = 1
  - Character Value = Quality
  - Integer Value = 0 (Scrap)
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.9545454545%	5	Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.1818181818%	5	Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.454545454545%	5	Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
1020 Fabrication		2541573	52201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58779%	40	Open	Available	43	0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	100.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Production	Available		0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%	3		Available		0
5500-A	2	2534405	00100	0.0%	1	Production	Available		0

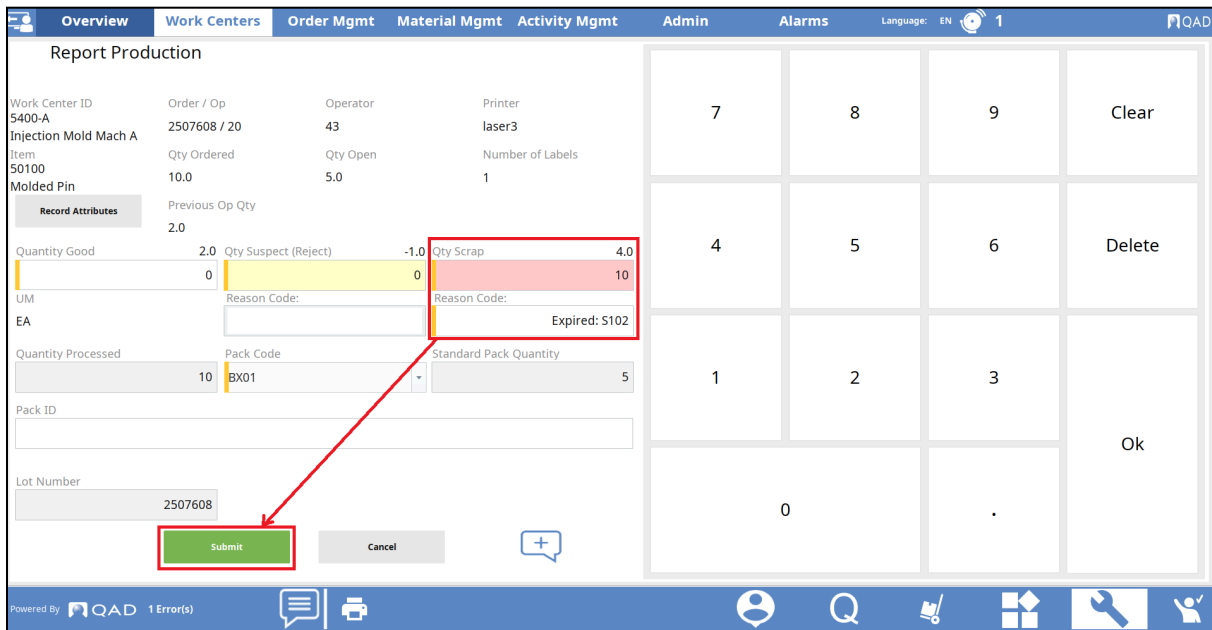
4. Navigate to the production order you would like to report against.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2507608-20			50100 Molded Pin	Production				2/9/2020		10	10	5		2	
2507863-10			50100 Molded Pin	Setup				2/2/2021	0.01%	100	200	145		0	17/12/2020

5. Navigate to the Report Production screen by selecting the Pencil button.



6. Report production and enter a scrap quantity that is greater than the threshold percentage you set up for the total production order quantity.



7. Verify that the scrapped quantity, which was greater than the threshold percentage, is displayed in red and verify that the system requested a Quality technician to address this issue.

The screenshot displays the QAD Production Execution interface. At the top, there are navigation tabs: Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The current view is 'Work Centers' for 'Injection Mold Mach A' (Work Center ID: 5400-A) during 'Current Shift 1'. The operator is '43 (1)'. Below this, there are tabs for 'Production Orders', 'Order View', 'Inventory', 'Equipment', and 'Material Request'. The main area shows a table of production orders with columns: Order ID - Op, Item, Operational Phase, Operator Action, Report, Material Action, Due Date, Perform To Rate, Std. Rate, QTY Open, Good, In Reject, and Scrapped. The order 2507608-20 for item 50100 Molded Pin is in the 'Production' phase, with a 'Perform To Rate' of 1.00% and 14 'Scrapped' units. Below the table, there are sections for 'Process Steps' (Setup, Production, Teardown) and 'Documents' (Process Alert, Inspection Molding Quality Spec, Inspection Molding Setup Sheet, Packaging Spec). A 'Recent Activity' table shows events like 'Rule Threshold Broken' and 'Order Condition Changed'. The bottom toolbar includes icons for search, print, and other functions.

## Scrap Reject Alert Hour Rule

### Purpose

The Scrap Reject Alert Hour Rule production option allows the user to specify a threshold quantity per hour of earned time at which the reported scrap and/or reject quantity rule is broken to initiate the selected banner request.

The screenshot shows the 'Production Options' configuration screen. The left sidebar lists parameter IDs from 21 to 34. The main area displays the configuration for parameter ID 30, 'ScrapRejectAlertHourRule'. The 'Description' field contains: 'Uses Dec field to specify threshold qty/hour of earned time when the scrap/reject rule is broken. Int field is used to specify what counts toward the rule: scrap(0), reject(1), both(2). Char field is used to set request type (ex. Quality)'. The 'Data Type' field is empty. Below this, there is a 'Production Option Settings' table with columns: SITE, Work Center, Machine, Role ID, Terminal ID, Reference, Decimal Title, Decimal Value, Boolean Title, Boolean Value, and Character.

### Where

The production option is applied to the Report Production screen when reporting scrap and/or reject item quantities.



### Setting

Enter the Decimal, Integer and Character Values for this option:

- **Decimal Value.** Specifies the threshold quantity per hour of earned time at which the reported scrap/reject quantity rule is broken.
- **Integer Value.** Specifies which quantities count toward the rule of reporting the scrap/reject items. The following options are available:
  - **Integer = 0 (Scrap).** The entered threshold quantity per hour of earned time is applied against the reported Scrap quantity.
  - **Integer = 1 (Reject).** The entered threshold quantity per hour of earned time is applied against the reported Reject quantity.
  - **Integer = 2 (Scrap & Reject).** The entered threshold quantity per hour of earned time is applied against the reported Scrap and Reject quantities.
- **Character Value.** Specifies the type of personnel requested. Choose from the following options:
  - Quality
  - Materials
  - Fork Truck
  - Maintenance
  - Supervisor

### Setup

Field	Setting
Parameter ID	30
Parameter	ScrapRejectAlertHourRule
Description	Uses Dec field to specify threshold qty/hour of earned time when the scrap/reject rule is

	broken. Int field is used to specify what counts toward the rule: scrap(0), reject(1), both(2). Char field is used to set request type (ex. Quality).
Decimal Title	Enter the setup details associated with the Decimal Value. For Scrap Reject Alert Hour Rule Option the Decimal Value is critical, therefore entering instructions is useful.
Decimal Value	Enter the decimal value to set up the control factor. For Scrap Reject Alert Hour Rule Option, enter the threshold quantity per hour of earned time at which the reported scrap/reject quantity rule is broken.
Character Title	Enter the setup details associated with the Character Value. For Scrap Reject Alert Hour Rule Option the Character Value is critical, therefore entering instructions is useful.
Character Value	Enter the text-based parameters to be used against this production option and set up the control factor as desired. For Scrap Reject Alert Hour Rule Option, specify the type of personnel to request. Choose from the following options: <ul style="list-style-type: none"> <li>● Quality</li> <li>● Materials</li> <li>● Fork truck</li> <li>● Maintenance</li> <li>● Supervisor</li> </ul>
Integer Title	Enter the setup details associated with the Integer Value. For Scrap Reject Alert Hour Rule Option the Integer Value is critical, therefore entering instruction is useful.
Integer Value	Enter the integer value to set up the control factor as desired. Choose from the following options for the Scrap Reject Alert Hour Rule Option: <ul style="list-style-type: none"> <li>● <b>Integer = 0 (Scrap)</b>. The entered threshold quantity per hour of earned time is applied against reported Scrap quantity.</li> <li>● <b>Integer = 1 (Reject)</b>. The entered threshold quantity per hour of earned time is applied against reported Reject quantity.</li> <li>● <b>Integer = 2 (Scrap &amp; Reject)</b>. The entered threshold quantity per hour of earned time is applied against the reported Scrap and Reject quantities.</li> </ul>

### Example

Follow these steps to report production against scrap and/or reject quantities and to verify the system functions according to the Decimal, Character, and Integer Value settings:

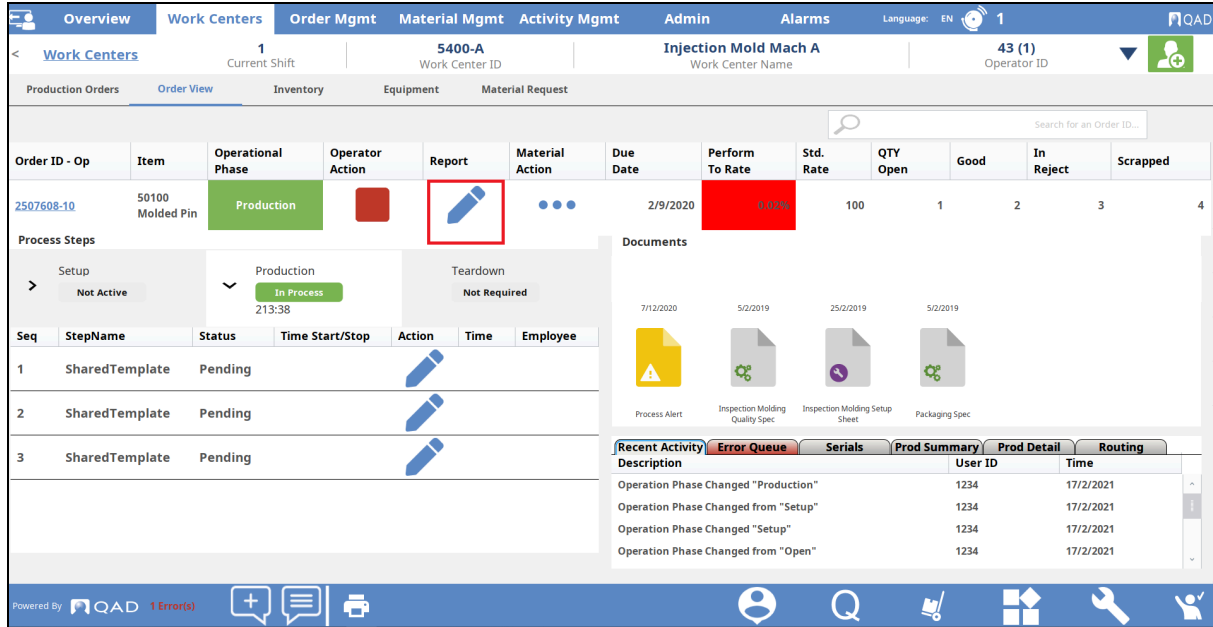
1. In **Production Options** (ScrapRejectAlertHourRule), set the Decimal, Character, and Integer Values to the following:
  - Decimal Value = 1
  - Character Value = Maintenance
  - Integer Value = 0 (Scrap)
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	35.954045343%	5	Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.1818181818%	5	Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.454545454545%	5	Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
1020 Fabrication		2541573	52201 Motor Mtg Plate 8 Way	0.0%	1	Open	Available		0
5400-A Injection Mold Mach A	1	2502499 (2)	50100 Molded Pin	7.58773%	40	Open	Available	43	0
5400-B Injection Mold Mach B	1	2502514 (3)	50100 Molded Pin	105.0%	16	Open	Down		0
5400-C Injection Mold Mach C		2502479 (4)	50100 Molded Pin	2400.0%	15	Production	Available		0
5400-D Injection Mold Mach D	2	2508017	50100 Molded Pin	100.0%	10	Production	Available	c5b	0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%	3		Available		0
5500-A	2	2534405	00100	0.0%	1	Production	Available		0

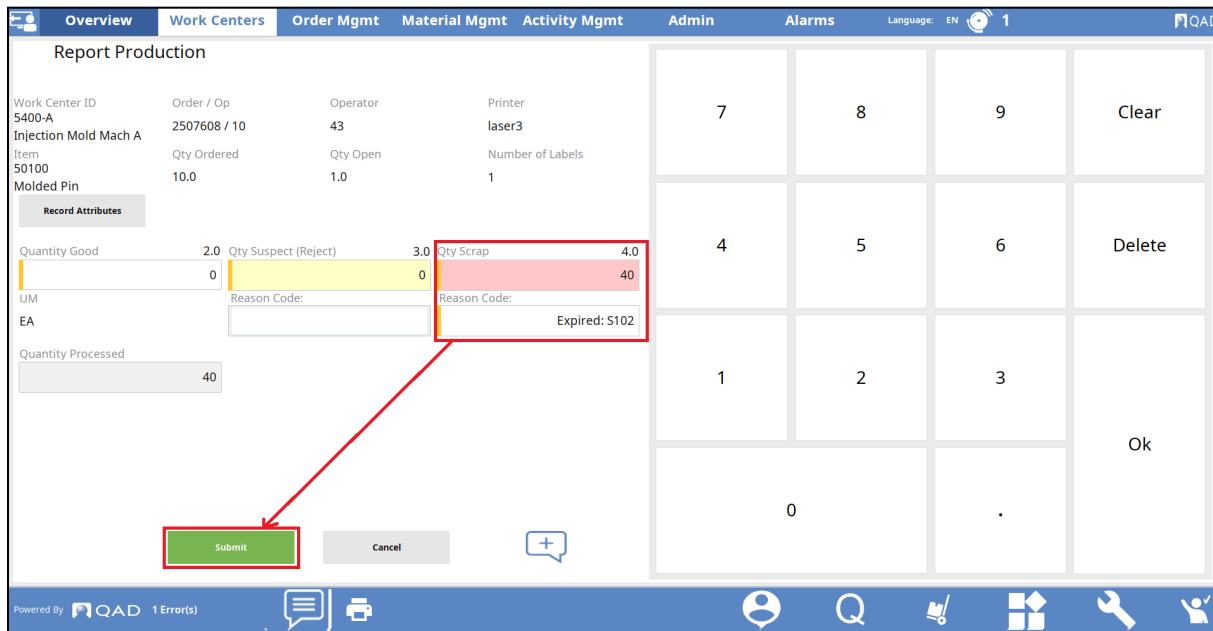
4. Navigate to the production order you would like to report against.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2507608-10			50100 Molded Pin	Production			●●●	2/9/2020	0%	100	10	1	10		1/2/2021
2507608-20			50100 Molded Pin	Production			●●●	2/9/2020	0.10%	10	10	-5	0	2	17/2/2021
2507655-10			50100 Molded Pin	Production			●●●	22/7/2020		0	150	-41	20		17/2/2021
2507863-10			50100 Molded Pin	Production			●●●	2/2/2021	0.01%	100	200	145	0		17/12/2020
2507842-10			R100 Repetitive FG	Setup			●●●	31/8/2020		100	100	80			

5. Navigate to the Report Production screen by selecting the Pencil button.



6. Report production and enter a scrap quantity that is greater than the threshold percentage you set up for the quantity per hour of earned time.



7. Verify that the scrapped quantity, which was greater than the threshold percentage, is displayed in red and verify that the system requested a Maintenance technician to address this issue.



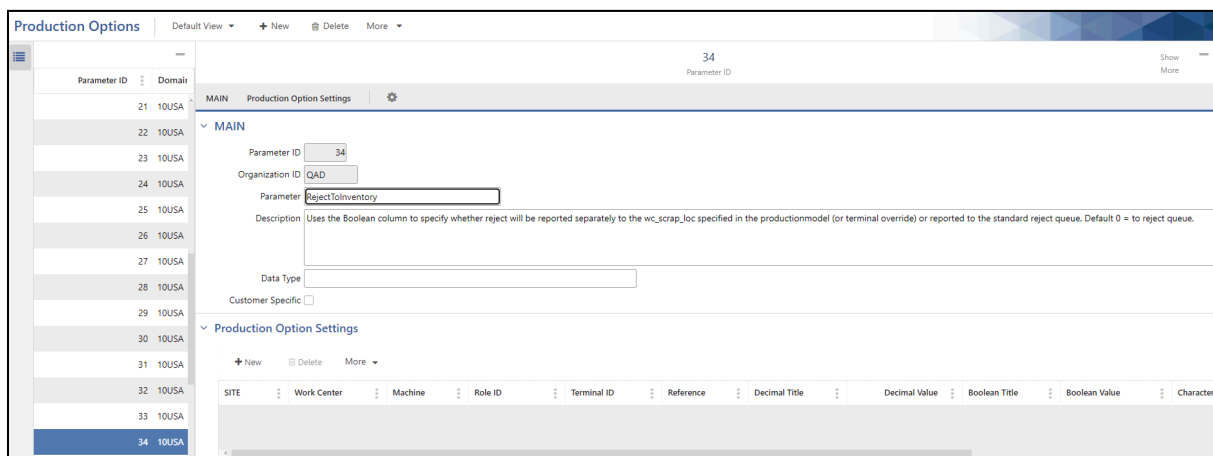
### Missing In Report Scrap Reject

This is an obsolete Production Option. Not in use anymore.

### Reject To Inventory

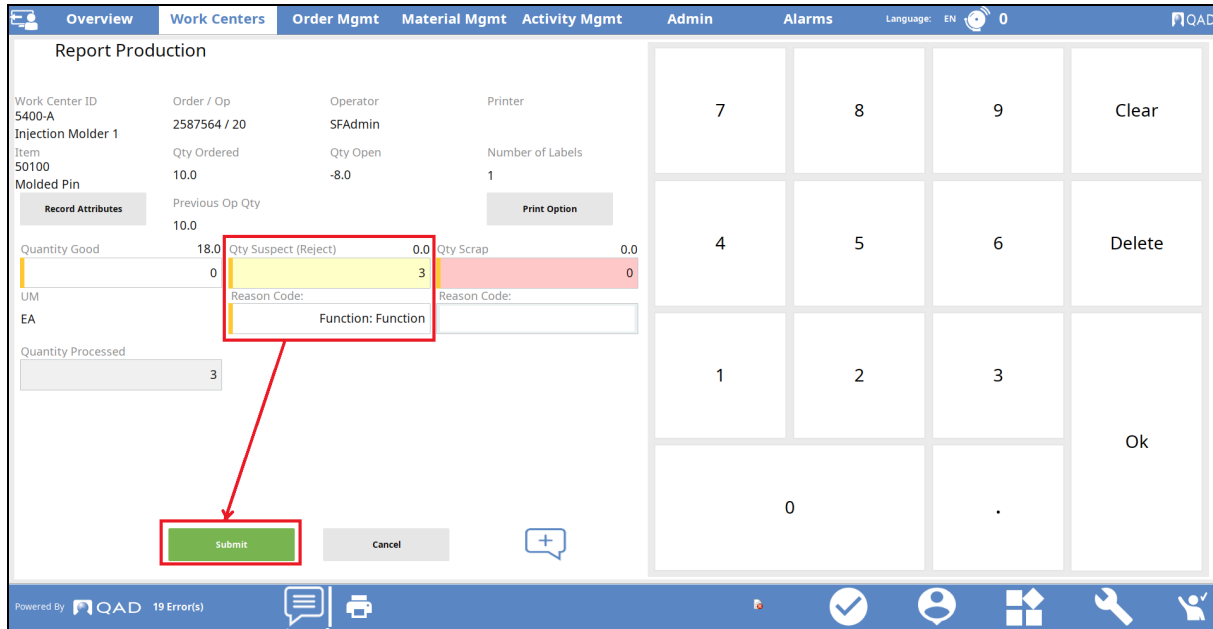
#### Purpose

The Reject to Inventory production option allows the user to specify whether the reject quantity is reported separately to the scrap location or to the standard reject queue.



#### Where

The production option is applied to the Report Production screen when you report the rejected item quantities at the specified work center.



### Setting

Enter the Boolean Value for this option:

- If Boolean = 1. Reject quantity is reported to the scrap location (wc\_scrap\_loc field in the production model SQL table).
- If Boolean = 0. Reject quantity is reported to the reject queue. This is the default setting.

### Setup

Field	Setting
Parameter ID	34
Parameter	RejectToInventory
Description	Uses the Boolean column to specify whether reject will be reported separately to the wc_scrap_loc specified in the production model (or terminal override) or reported to the standard reject queue. Default 0 = to reject queue.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Reject To Inventory Option, therefore entering the instructions is useful.
Boolean Value	Set the control factor defining whether you report reject quantity against scrap location or the standard reject queue: <ul style="list-style-type: none"> <li>• <b>1.</b> Reject quantity is reported to the scrap location.</li> <li>• <b>0.</b> Reject quantity is reported to the reject queue. Default setting.</li> </ul>

### Example

Follow these steps to report production with rejected item quantities:

1. In **Production Options** (RejectToInventory), enter Boolean Value = 1 (Reject quantity is reported to the reject queue).
2. Check the current Inventory Quantity at the scrap location.

Inventory Detail

Location = "039" X Search

Item	Description	Site	Location	Site Quantity	Location Quantity	UM	Lot/Serial	Reference	Inventory Status
50100	Molded Pin	10-200	039	222.0	7.0	EA			N-Y-N

Overview Work Centers Order Mgmt Material Mgmt Activity Mgmt Admin Alarms

Work Centers 2 Current Shift 5400-A Work Center ID Injection Mold Mach A Work Center Name SF Admin (1) Operator ID

Production Orders Order View Inventory Equipment Material Request

0 Backflush 22 Receipt 0 Scrap 22 All Search... Summary Detail Refresh

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Action
------	-------------	----------	----------	------------	-----------	-----------	-----------	--------

Show 0 Requests Cancel Pending Close All Complete Button

Powered By QAD 2 Error(s)

3. Log in to the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (9)	50100 Molded Pin	1.0%		53 Open	Available	SFAdmin	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%		30 Open	Available	SFAdmin	0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%		11 Open	Available	Supervisor	0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%		16 Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%		6 Open	Available		0
5900 Heat Treat				0.0%		0	Available		0

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4. Select the production order you would like to report against.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587564-20				50100	Production				3/17/2021 3/31/2021				10	0	2	10	4/14/2021
2583995-10				50100	Equip Stopped				10/7/2020 10/7/2020		144.58%	100	10	0			
2583996-10				50100	Equip Stopped				10/9/2020 10/9/2020			100	15	10			
2583998-10				50100	Equip Stopped				11/5/2020 11/5/2020			100	20	19			
2584019-10				50100	Equip Stopped				2/18/2021 2/18/2021			100	50	50			
2584022-10				50100	Equip Stopped				2/23/2021 2/23/2021			100	50	38			
2587536-10				50100	Equip Stopped				3/2/2021 3/2/2021		0.08%	100	10	1	2		4/9/2021
2587544-10				50100	Equip Stopped				3/10/2021 3/10/2021		0%	100	10	10			
mgw0406b-10				mgw-fg	Equip Stopped				4/6/2021 4/6/2021		0.01%	100	100	97			

5. Navigate to the Report Production screen by selecting the Pencil button.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2587564-20	50100 Molded Pin	Production				3/31/2021			0	-4	14	0

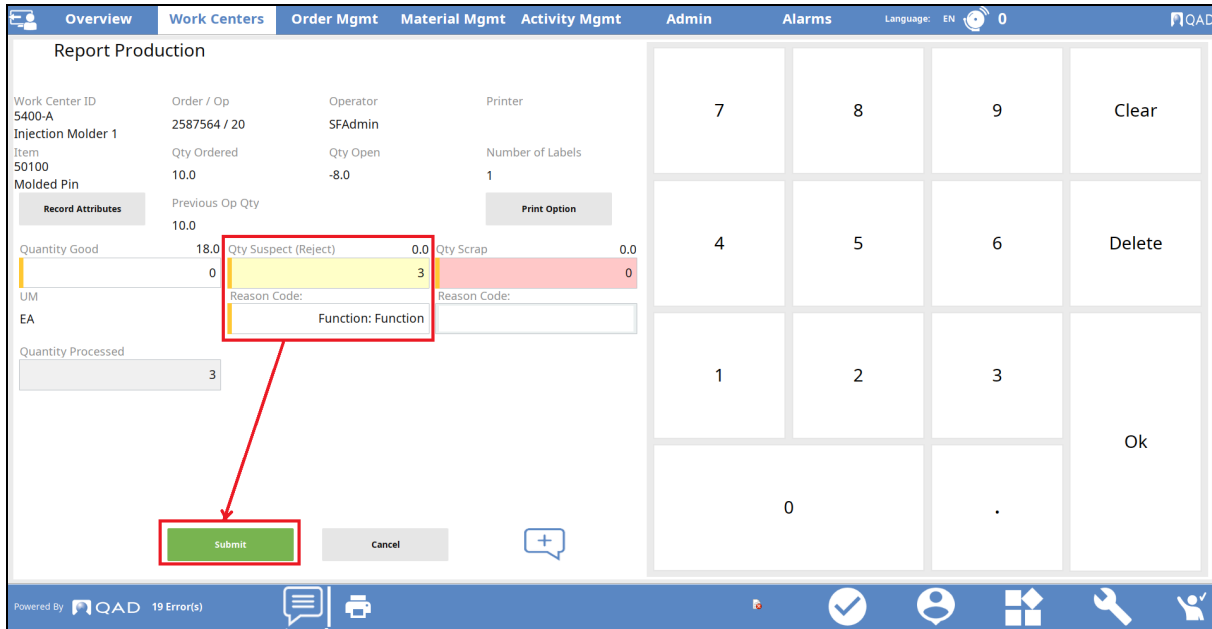
  

Seq	StepName	Status	Time Start/Stop	Action	Time	Employee
1	Visual Insp-100%					
2	Visual Insp-hourly	Pending	-01:58			
3	OpenWebsite	Pending				

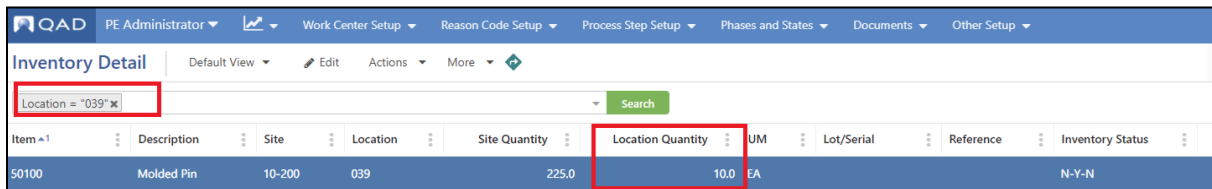
  

Recent Activity		Serials	Prod Summary	Prod Detail	Routing
Description	Qty Produced	Reason	User...	Time	
Reported 0.0 on order 2587564-20	0		admi...	4/14/2021 11:...	
Reported 0.0 on order 2587564-20	2		admi...	4/14/2021 11:...	
Order 2587564 Condition Changed Partially C...			admi...	4/14/2021 11:...	
Reported 0.0 on order 2587564-20	0		admi...	4/14/2021 11:...	

6. Report production with reject item quantities.



7. In the **Inventory Detail** screen, verify the inventory quantity increased in the scrap location because the rejected items were automatically stored at the scrap location. The On Hand quantity in **Inventory Detail** is increased by the reported rejection quantity to the scrap location.



8. In PE, the inventory in the scrap locations was also increased.

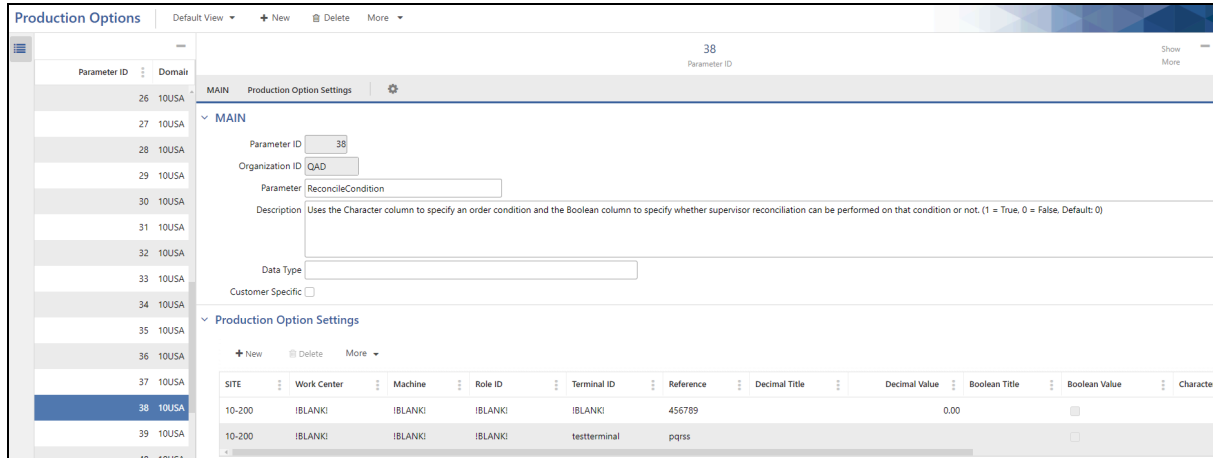
## Report On Cumulative Items

This is an obsolete Production Option. Not in use anymore.

## Reconcile Condition

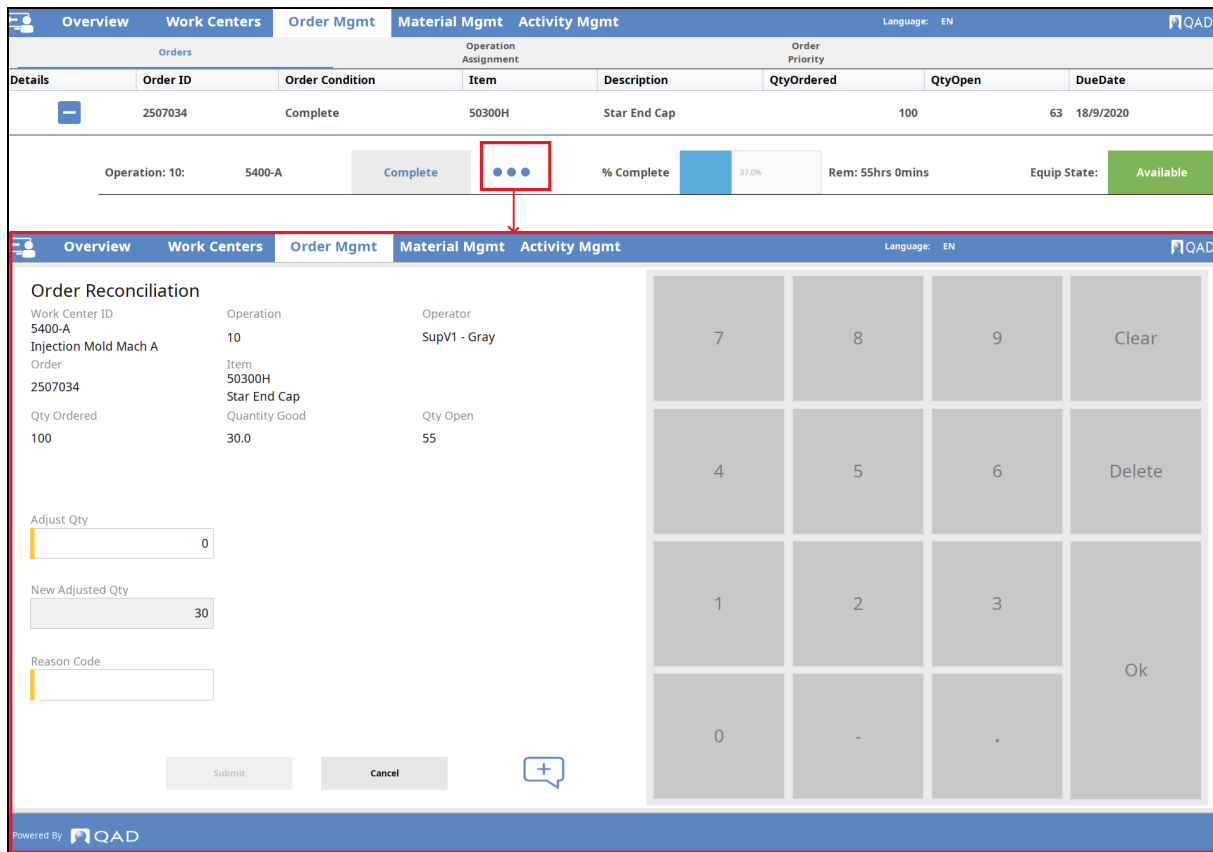
### Purpose

The Reconcile Condition production option allows the user to specify whether supervisor reconciliation can be performed against a specified production order condition.



## Where

The production option is applied to the Reconciliation Order screen.



## Setting

Enter the Character and Boolean Values for this option:

- **Character Value.** Specifies the production order condition against which the reconciliation can be performed. Choose from the following production order conditions:
  - Open
  - Assigned
  - In-Process

- Partially Complete
- Complete
- Closed
- **Boolean Value.** Specifies whether the reconciliation can or cannot be performed under the specified Character Value setting:
  - If Boolean =1, the reconciliation function can be performed.
  - If Boolean = 0, the reconciliation function can NOT be performed. This is the default setting.

**Setup**

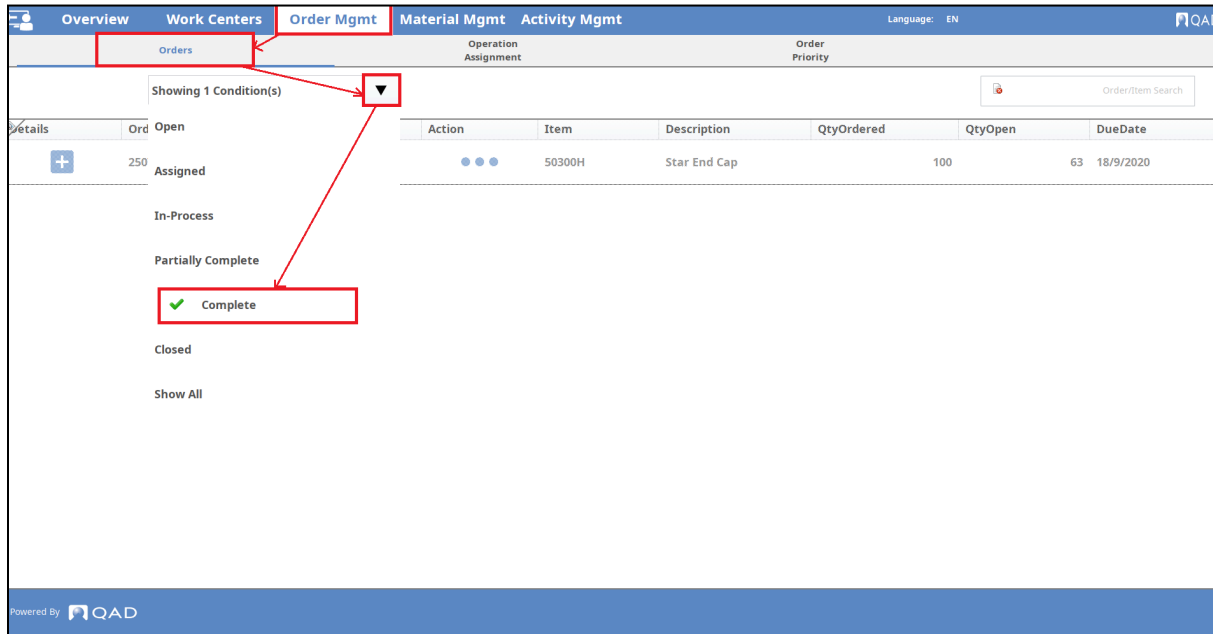
Field	Setting
Parameter ID	38
Parameter	ReconcileCondition
Description	Uses the Character column to specify an order condition and the Boolean column to specify whether supervisor reconciliation can be performed on that condition or not. (1 = True, 0 = False, Default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Reconcile Condition Option, therefore entering the instructions is useful.
Boolean Value	Specify whether the reconciliation can or cannot be performed under the specified Character Value setting: <ul style="list-style-type: none"> <li>● If Boolean =1, the reconciliation function can be performed.</li> <li>● If Boolean = 0, the reconciliation function can NOT be performed. This is the default setting.</li> </ul>
Character Title	Enter the setup details associated with the Character Value. For Reconcile Condition Option the character value is critical, therefore entering instructions is useful.
Character Value	Enter the text-based parameters to be used against this production option and set up the control factor as desired. For Reconcile Condition Option, specify the production order condition against which the reconciliation can be performed. Choose from the following production order conditions: <ul style="list-style-type: none"> <li>● Open</li> <li>● Assigned</li> <li>● In-Process</li> <li>● Partially Complete</li> <li>● Complete</li> <li>● Closed</li> </ul>

**Example**

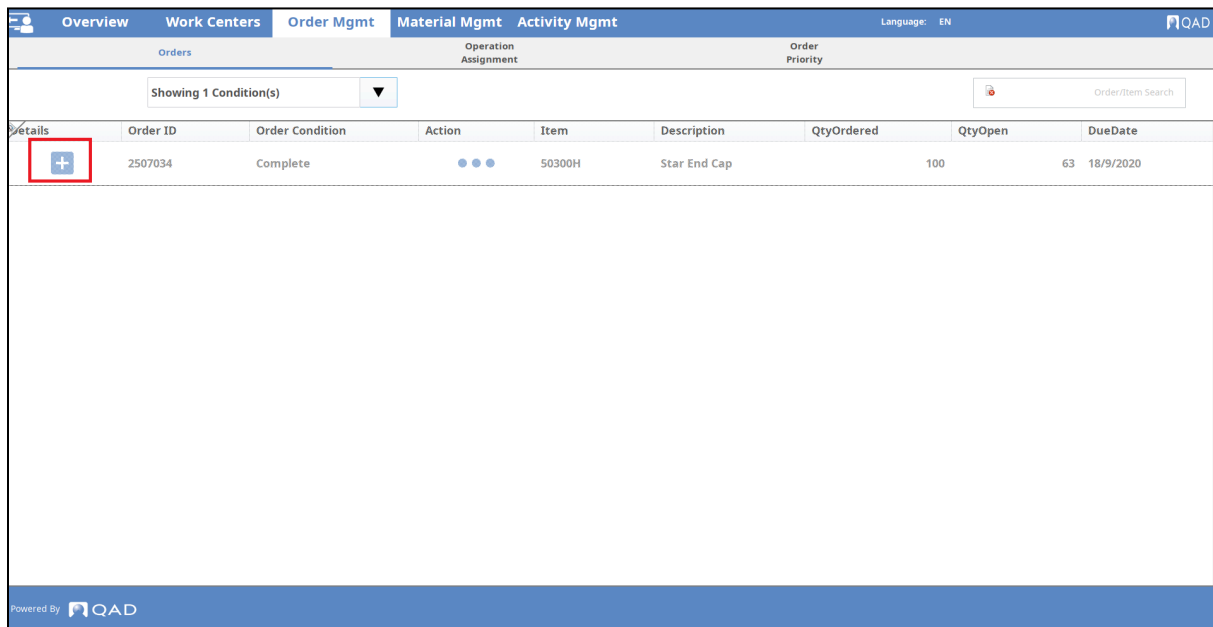
Follow these steps to perform the reconciliation against the production order in a specified condition as a supervisor:

1. In Production Options (ReconcileCondition), set the Boolean and Character Values to the following:
  - Boolean Value = 1
  - Character Value = Complete

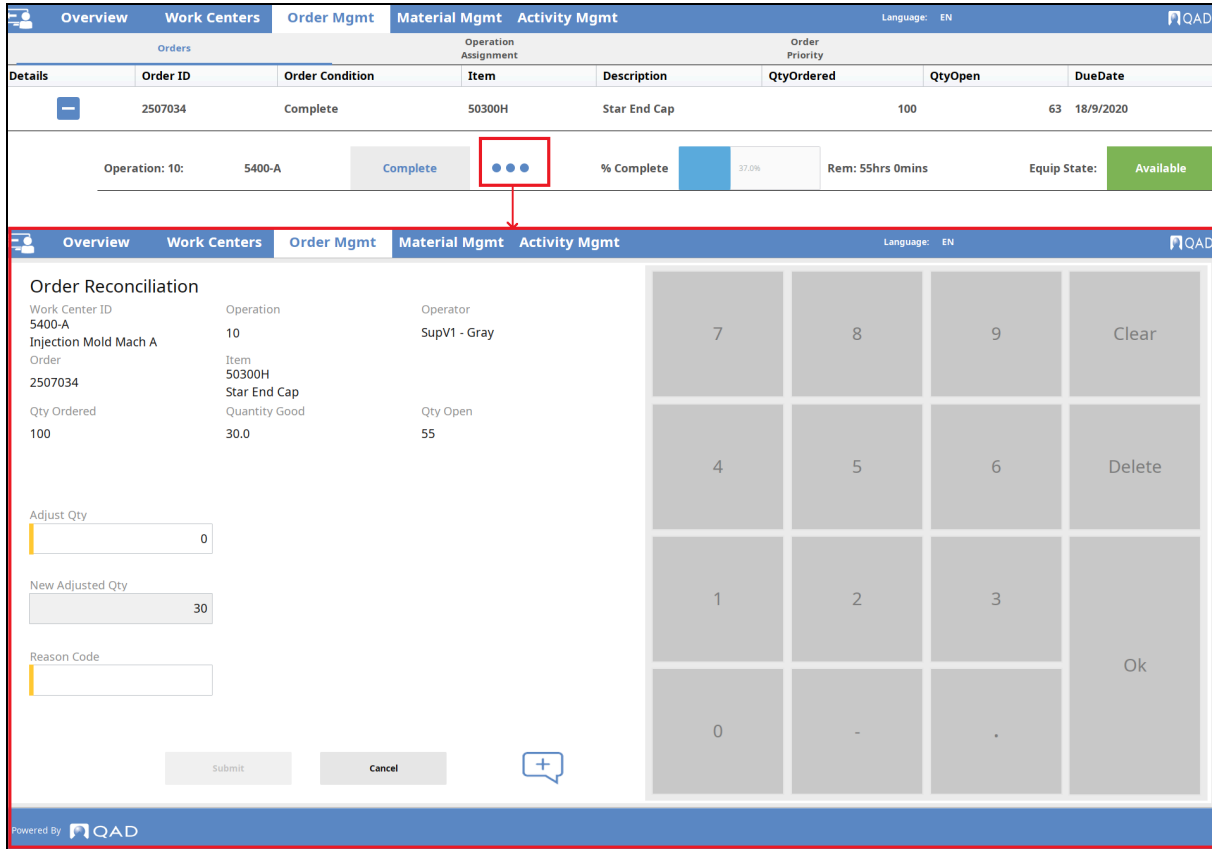
2. Log into PE.
3. Log into the Site against which you applied the setting as a supervisor.
4. Navigate to Order Management > Orders tab and verify the order conditions are the same as the character value you set, which in this case is Complete.



5. Select an order and then click on the Action dots.



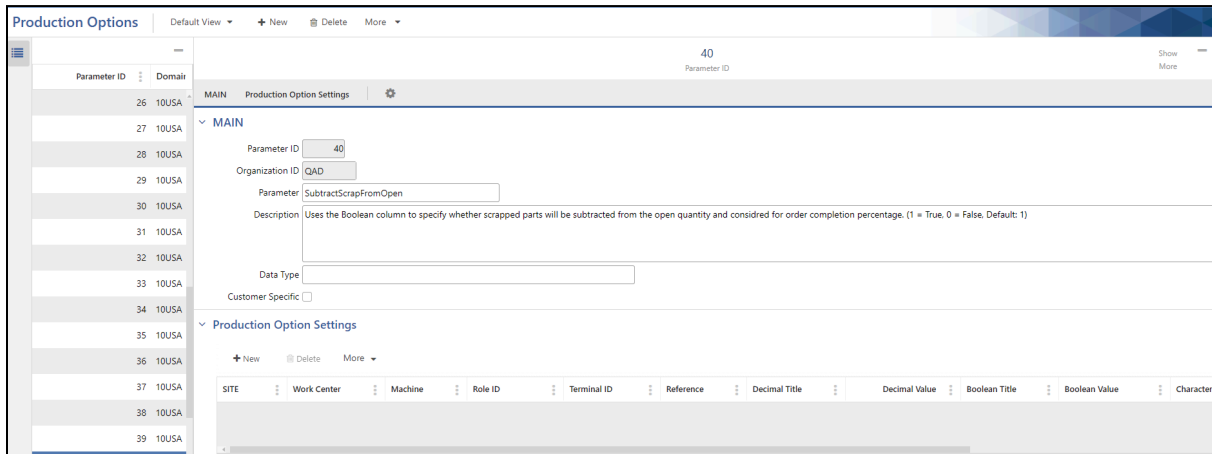
6. Verify whether the order reconciliation functionality is available, which in this case it is set to be available.



## Subtract Scrap From Open

### Purpose

The Subtract Scrap From Open production option allows the user to specify whether scrapped items are subtracted from the open quantity on the production order and considered in the production order completion percentage.



### Where

The production option is applied to the Report Production screen, when you report scrapped item quantities.

## Setting

Enter the Boolean Value for this option:

- If Boolean = 1, scrapped parts are subtracted from the open quantity on the production order and considered in the production order completion percentage. This is the default setting.
- If Boolean = 0, scrapped parts are NOT subtracted from the open quantity on the production order and NOT considered in the production order completion percentage.

## Setup


Field	Setting
Parameter ID	40
Parameter	SubtractScrapFromOpen
Description	Uses the Boolean column to specify whether scrapped parts will be subtracted from the open quantity and considered for order completion percentage. (1 = True, 0 = False, Default: 1)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Subtract Scrap From Open Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value which determines the following: <ul style="list-style-type: none"> <li>• <b>1.</b> Scrapped parts are subtracted from the open quantity on the production order and considered in the production order completion percentage.</li> <li>• <b>0.</b> Scrapped parts are NOT subtracted from the open quantity on the production order and NOT considered in the production order completion percentage.</li> </ul>

## Example

Follow these steps to report production and scrapped item quantities:

1. In Production Options (SubtractScrapFromOpen), enter Boolean Value = 1.
2. Log into PE.

3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Mold Mach A		2584021 (3)	50200 Large Bushing	12.0%	3	Production	Available	SF Admin	0
5400-B Injection Mold Mach B				0.0%	0		Available		0
5400-C Injection Mold Mach C				0.0%	0		Available		0
5500-B Assembly Cell B				0.0%	0		Available		0
5900 Heat Treat				0.0%	0		Available		0

4. Select the production order you want to report against.

Production Orders		Order View	Inventory	Equipment	Material Request										
4 Open		4 Active		1 Rework											
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2584021-10			50200	Production				2/19/2021	0.02%	100	50	44	4		3/1/2021
2584022-10			50100	Production				2/23/2021	0.2%	100	50	9	1		3/2/2021
2587532-10			50100	Production				3/1/2021	0.15%	100	100	97	1		3/2/2021
2587536-10			50100	Production				3/2/2021		100	10	10			

5. Navigate to the Order View screen and review the current Qty Open.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2587532-10	50100 Molded Pin	Production				3/1/2021	0.15%	100	97	1	0	2

6. Report production with rejected item quantities.

Work Center ID: 5400-A  
 Order / Op: 2587532 / 10  
 Operator: SF Admin  
 Printer: [Blank]  
 Item: 50100 Molded Pin  
 Qty Ordered: 100.0  
 Qty Open: 96.0  
 Number of Labels: 1

Quantity Good: 1.0  
 Qty Suspect (Reject): 1.0  
 Reason Code: Chipped: Chipped

Quantity Processed: 1  
 Pack Code: BX02  
 Standard Pack Quantity: 12

Buttons: Submit, Cancel

7. Navigate to the Report Rework screen by selecting the Pencil button.

Order ID - Op	Type	Item	Operation Phase	Report	Material Action	Due Date	Perform To Rate	Order Qty	Reject Queue	Qty Reworked	Qty Scrapped	Prev Op Qty
2584022-10		50100	Production		...	23/2/2021	0.2%	50	4	1	1	
2587532-10		50100	Production		...	1/3/2021	0.1%	100	1	1	1	2

8. Report rework with scrap quantity.

**Report Rework**

Work Center ID: 5400-A  
 Operation: 10  
 Injection Mold Mach A

Order: 2587532  
 Item: 50100  
 Molded Pin

Qty In Reject: 1  
 Qty Reworked: 1  
 Qty Scrapped: 2

**Reworked**

Qty	Reason Codes
0	
0	
0	
0	
0	

**Scrapped**

Qty	Reason Codes
1	Chipped: Chipped
0	
0	
0	
0	

Buttons: Submit, Cancel

9. Review the Qty Open after reporting scrap quantity. Verify the Total of Qty open is accurate and that the total Qty Open is equal to the required quantity on the production order minus the reported scrapped quantity.

The screenshot displays the QAD Production Execution interface. At the top, there are navigation tabs: Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The current view is 'Work Centers' for 'Injection Mold Mach A' (Work Center ID: 5400-A, Operator ID: SF Admin (1)).

The main area shows a production order summary for Order ID 2587532-10, Item 50100 Molded Pin, in the 'Production' phase. Key metrics include: Perform To Rate (0.2%), Std. Rate (100), QTY Open (96), Good (1), In Reject (0), and Scrapped (3). The 'QTY Open' value is highlighted with a red box.

Below the summary, there are sections for 'Process Steps' and 'Documents'. The 'Process Steps' table lists three steps:

Seq	StepName	Status	Time Start/Stop	Action	Time	Employee
1	Visual Insp-100%					
2	Visual Insp-hourly	Upcoming	00:51			
3	OpenWebsite	Pending				

The 'Documents' section shows a 'Recent Activity' table with columns: Description, Error Queue, Serials, Prod Summary, Prod Detail, and Routing. The data includes a 'Reported 1.0 scrap' entry with User ID 'admins' and Time '3/3/2021'.

## Enforce Reporting Attribute Entry

### Purpose

The Enforce Reporting Attribute Entry production option allows the user to specify whether entering attributes is required to complete a production report after submission.

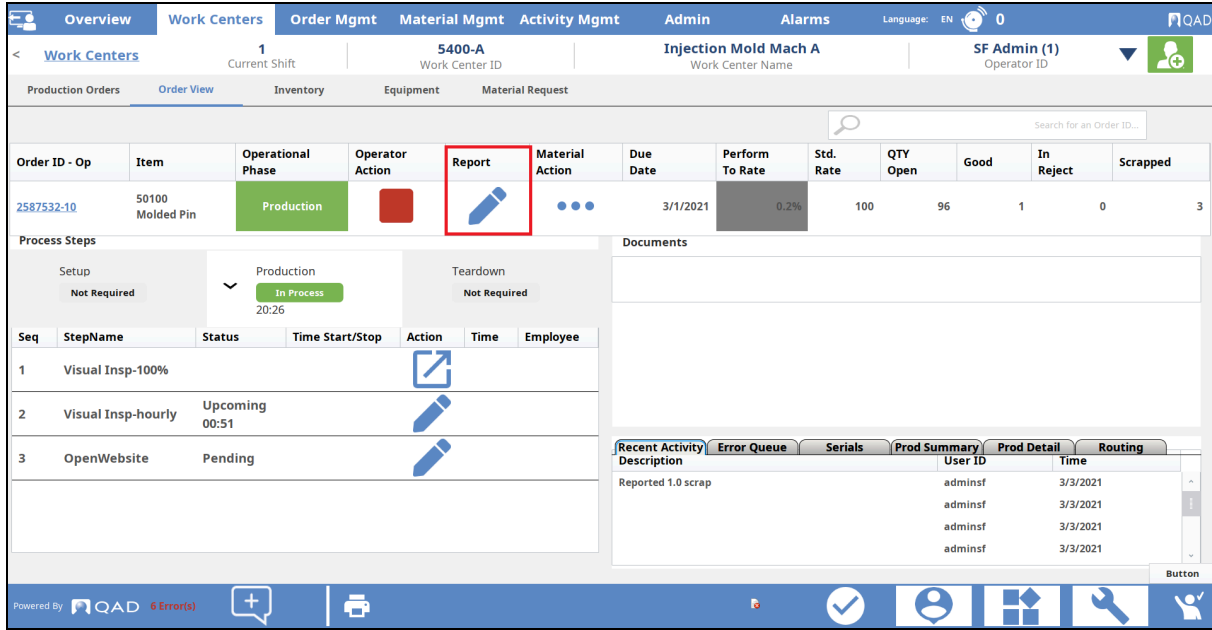
The screenshot shows the 'Production Options' configuration screen. The main area displays the settings for Parameter ID 45, which is named 'EnforceReportingAttributeEntry'. The description states: 'Uses the Boolean column to specify whether the entry of attributes when submitting a production report is required to complete the report. (1 = required, 0 = not required, default 0)'. The 'Data Type' field is currently empty.

Below the main settings, there is a 'Production Option Settings' section with a table of settings:

SITE	Work Center	Machine	Role ID	Terminal ID	Reference	Decimal Title	Decimal Value	Boolean Title	Boolean Value	Character

### Where

The production option is applied to the Report Production screen when recording attributes.



**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, entering attributes is required to complete the production order.
- If Boolean = 0, entering attributes is NOT required to complete the production order. This is the default setting.

**Setup**

Field	Setting
Parameter ID	45
Parameter	EnforceReportingAttributeEntry
Description	Uses the Boolean column to specify whether the entry of attributes when submitting a production report is required to complete the report. (1 = required, 0 = not required, default 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean Value is critical for the Enforce Reporting Attribute Entry Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value which determines the following: <ul style="list-style-type: none"> <li>• <b>1.</b> Entering attributes is required to complete the production order.</li> <li>• <b>0.</b> Entering attributes is NOT required to complete the production order.</li> </ul>

**Example**

Follow these steps to report production and to verify if entering attributes is required according to the Boolean Value setting:

1. In **Production Options** (EnforceReportingAttributeEntry), enter Boolean Value = 1.
2. Log into PE.

3. Log into the work center against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Mold Mach A	3	2584021 (3)	50200 Large Bushing	12.0%	3	Production	Available	SF Admin	0
5400-B Injection Mold Mach B				0.0%	0		Available		0
5400-C Injection Mold Mach C				0.0%	0		Available		0
5500-B Assembly Cell B				0.0%	0		Available		0
5900 Heat Treat				0.0%	0		Available		0

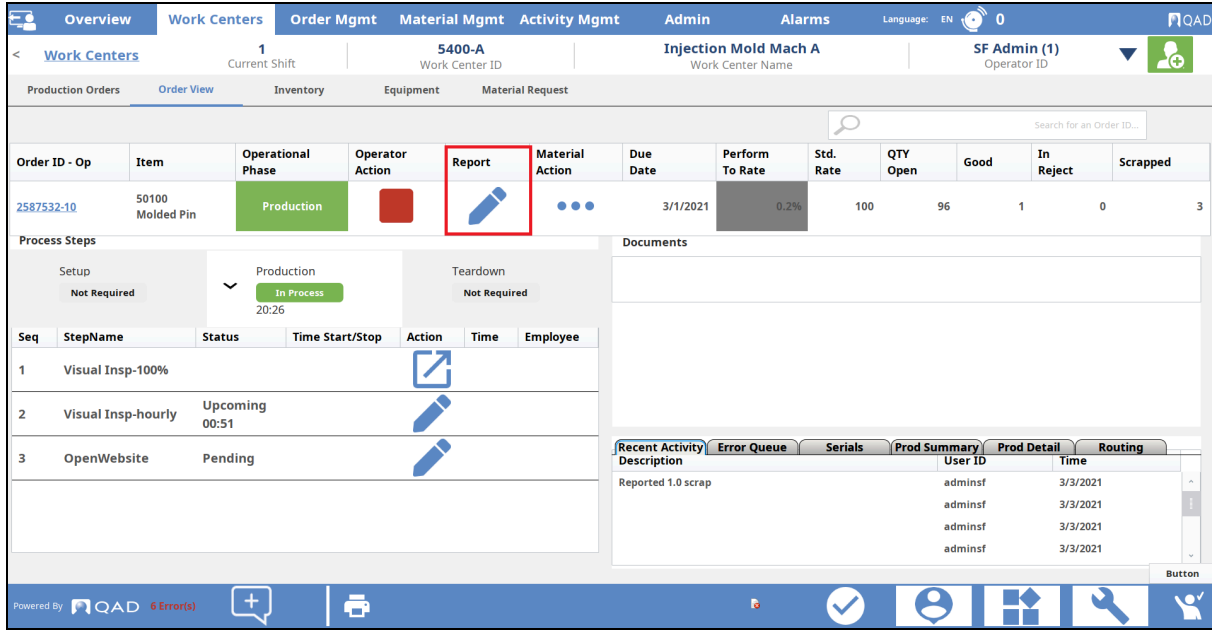
Powered By QAD

4. Select the production order you would like to report against.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD						
Work Centers		1 Current Shift	5400-A Work Center ID	Injection Mold Mach A Work Center Name		SF Admin (1) Operator ID									
Production Orders		Order View	Inventory	Equipment	Material Request										
4 Open		4 Active		1 Rework						Search for an Order ID...					
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2584021-10			50200	Production				2/19/2021	0.02%	100	50	44	4		3/1/2021
2584022-10	●		50100	Production				2/23/2021	0.2%	100	50	9	1		3/2/2021
2587532-10			50100	Production				3/1/2021	0.2%	100	100	96	1		3/3/2021
2587536-10			50100	Production				3/2/2021		100	10	10			

Powered By QAD 6 Error(s)

5. Navigate to the Order View screen and report against the production order.

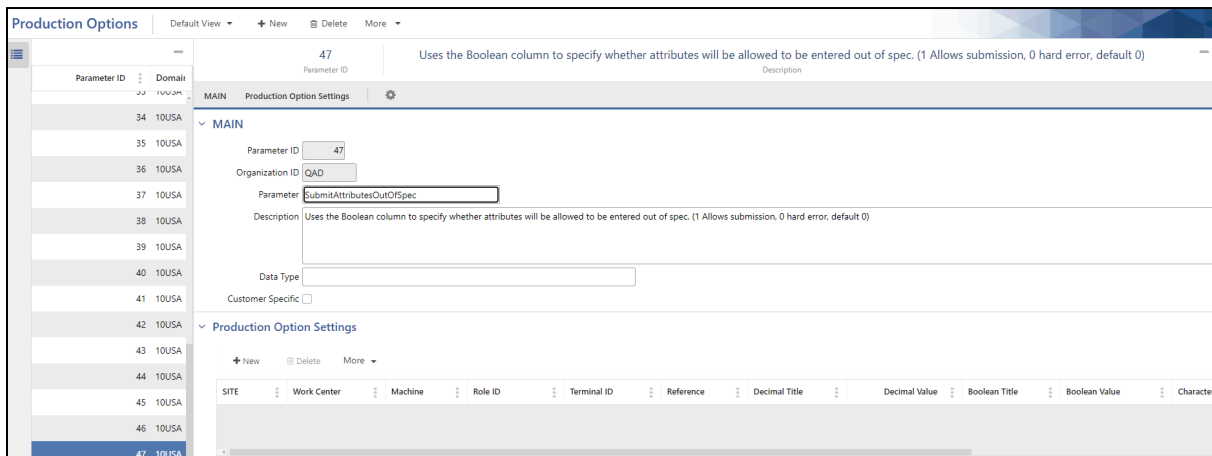


- Report production against the production order and submit *without* recording the attributes. Verify that the system does not allow you to submit a production report without entering the item attributes.

## Submit Attribute Out Of Spec

### Purpose

The Submit Attributes Out Of Spec production option allows the user to specify whether users can enter attributes that are out of specifications.



### Where

The production option is applied to the Report Production screen when entering attributes.

The screenshot shows the 'Attributes' setup screen in the QAD Production Execution interface. The interface includes a navigation bar with tabs for Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The 'Attributes' section displays a table with columns: Attribute, Attribute ID, Level, and Entered Value. The 'Density Integer' attribute is highlighted in blue. Below the table, the 'Serial ID' field contains the value '50000000549' and the 'Value (Default: 0)' field contains '1000000000000'. The 'Enter' button is highlighted in green. Red arrows indicate the flow from the table to the input fields and then to the 'Enter' button.

## Setting

Enter the Boolean Value for this option:

- If Boolean =1, users can submit attributes that are out of specification.
- If Boolean = 0, users cannot submit attributes that are out of specification. When this occurs, an error message is displayed. This is the default setting.

## Setup

Field	Setting
Parameter ID	47
Parameter	SubmitAttributesOutOfSpec
Description	Uses the Boolean column to specify whether attributes will be allowed to be entered out of spec. (1 Allows submission, 0 hard error, default 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Submit Attributes Out Of Spec Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value which determines the following: <ul style="list-style-type: none"> <li>• <b>1.</b> Users can submit attributes that are out of specification.</li> <li>• <b>0.</b> Users cannot submit attributes that are out of specifications.</li> </ul>

## Example

Follow these steps to report production and to record attributes that are out of specifications:

1. In **Production Options** (SubmitAttributesOutOfSpec), enter Boolean Value = 0. (Users cannot submit attributes that are out of specifications).
2. Log into PE.
3. Log into the work center against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Mold Mach A	3	2584021 (3)	50200 Large Bushing	12.0%	3	Production	Available	SF Admin	0
5400-B Injection Mold Mach B				0.0%	0		Available		0
5400-C Injection Mold Mach C				0.0%	0		Available		0
5500-B Assembly Cell B				0.0%	0		Available		0
5900 Heat Treat				0.0%	0		Available		0

Powered By QAD

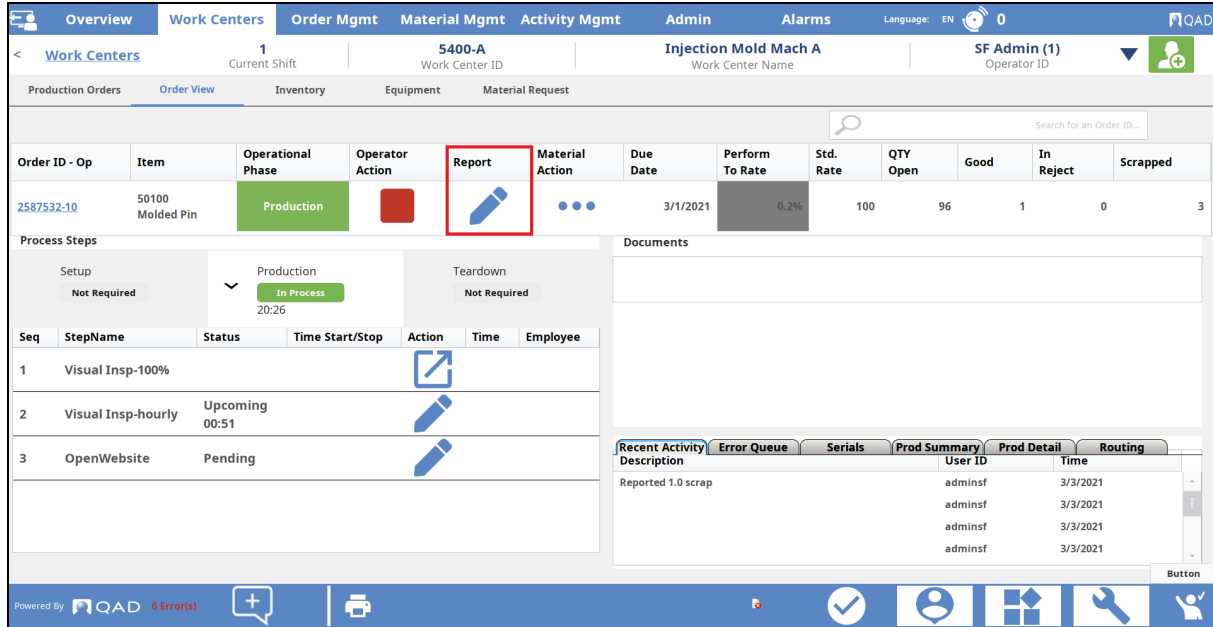
4. Select the production order you would like to report against.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD						
Work Centers		1 Current Shift	5400-A Work Center ID	Injection Mold Mach A Work Center Name		SF Admin (1) Operator ID									
Production Orders		Order View	Inventory	Equipment	Material Request	Search for an Order ID...									
4 Open		4 Active		1 Rework											
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2584021-10			50200	Production				2/19/2021	0.02%	100	50	44	4		3/1/2021
2584022-10			50100	Production				2/23/2021	0.2%	100	50	9	1		3/2/2021
2587532-10			50100	Production				3/1/2021	0.2%	100	100	96	1		3/3/2021
2587536-10			50100	Production				3/2/2021		100	10	10			

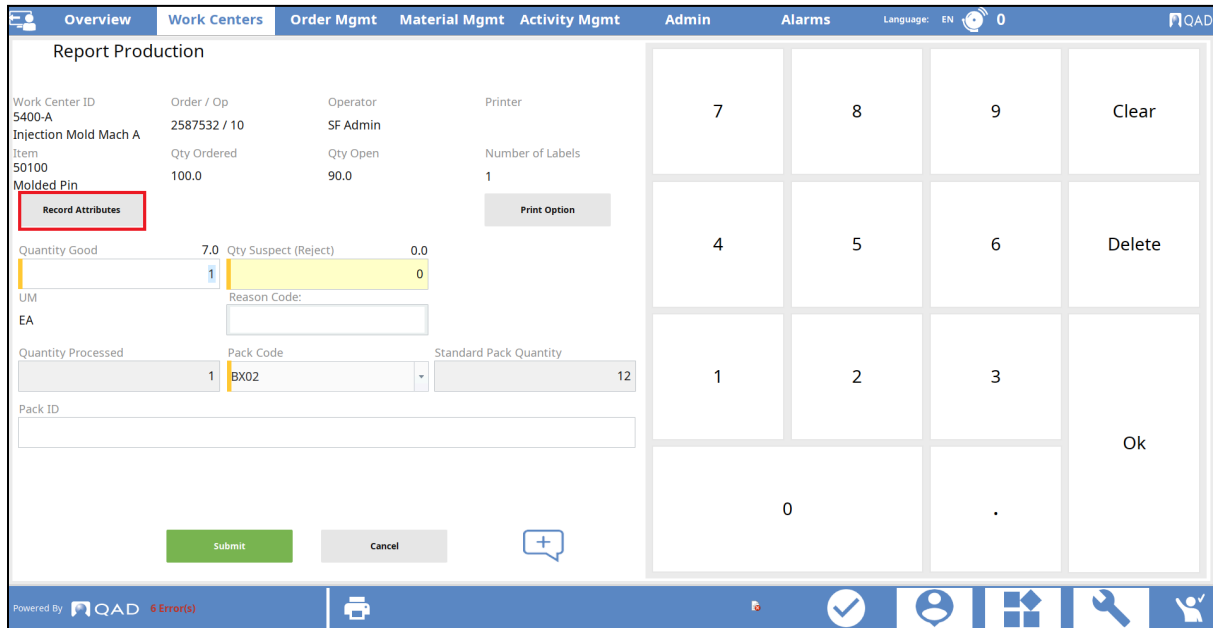
Powered By QAD 6 Error(s)

Buttons:

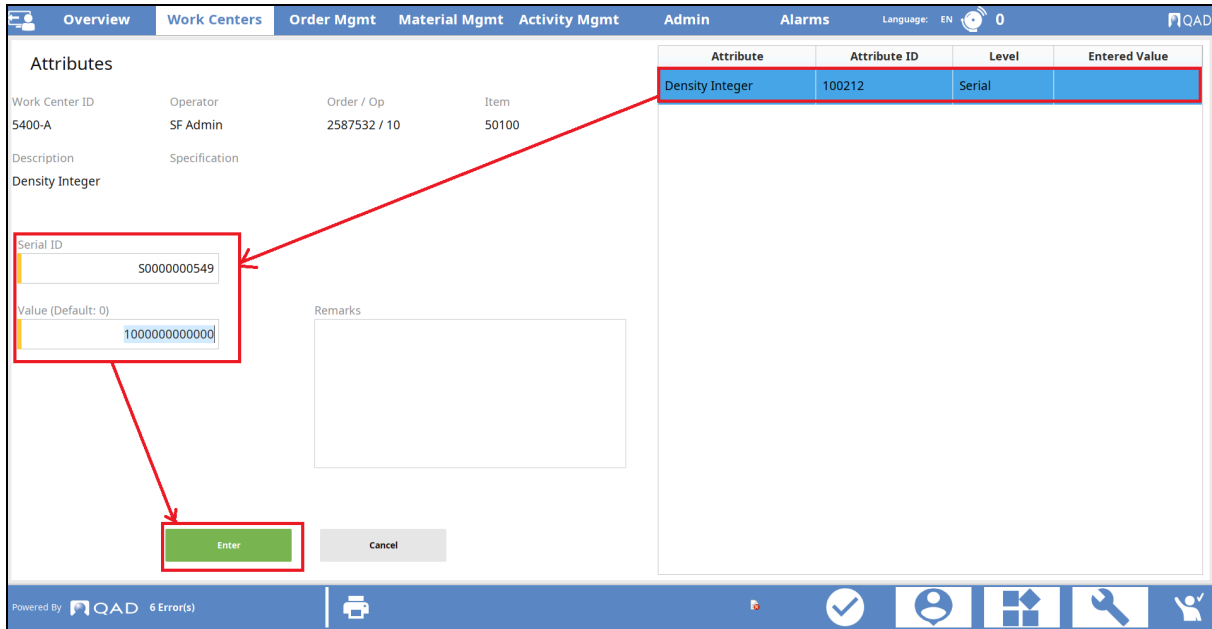
5. In the Order View screen, report production by selecting the Pencil button.



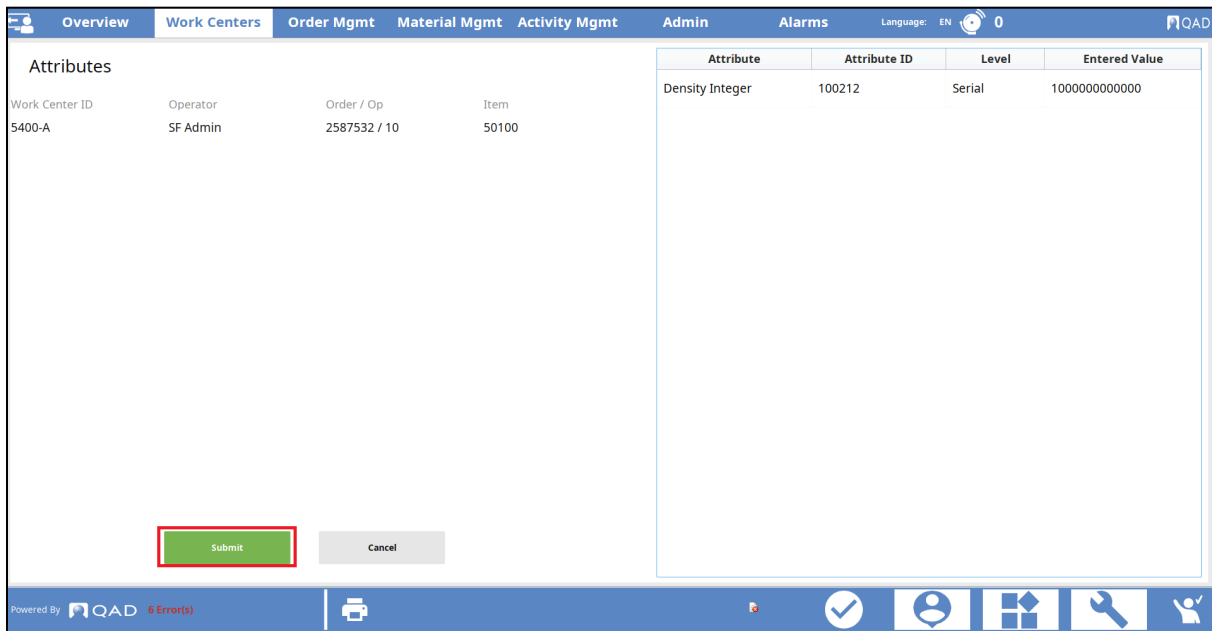
6. Select the Record Attributes button.



7. Enter item attributes that are out of specification.



8. Select Enter to submit the attributes. Verify the system does not allow you to submit the attributes because they are out of specification.



### Scrap Threshold Planned

This is an obsolete Production Option. Not in use anymore.

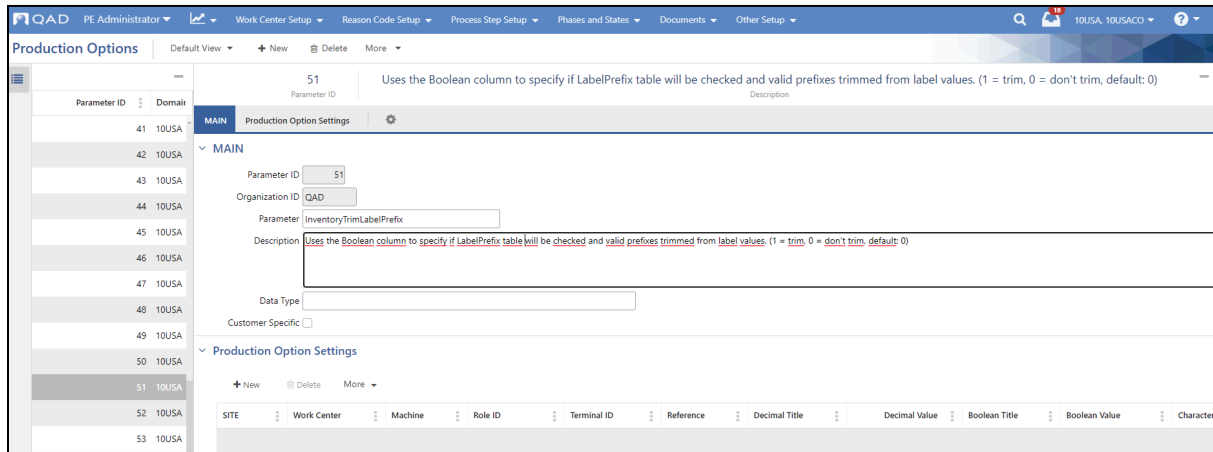
### Auto Report Timer

This is an obsolete Production Option. Not in use anymore.

### Inventory Trim Label Prefix

#### Purpose

The Inventory Trim Label Prefix production option allows the user to specify if a Label Prefix table is checked and the valid prefixes are trimmed from the label values.



## Where

The production option is validated by printing a label and checking the prefix.

## Setting

Enter the Boolean Value for this option:

- If Boolean =1, the label prefix is trimmed from the label value.
- If Boolean = 0, the label prefix is NOT trimmed from the label value. This is the default setting.

## Setup

Field	Setting
Parameter ID	51
Parameter	InventoryTrimLabelPrefix
Description	Uses the Boolean column to specify if the Label Prefix table will be checked and valid prefixes trimmed from label values. (1 = trim, 0 = don't trim, default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Inventory Trim Label Prefix Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value which determines the following: <ul style="list-style-type: none"> <li>• 1. The label prefix is trimmed from the label value.</li> <li>• 0. The label prefix is NOT trimmed from the label value.</li> </ul>

## Example

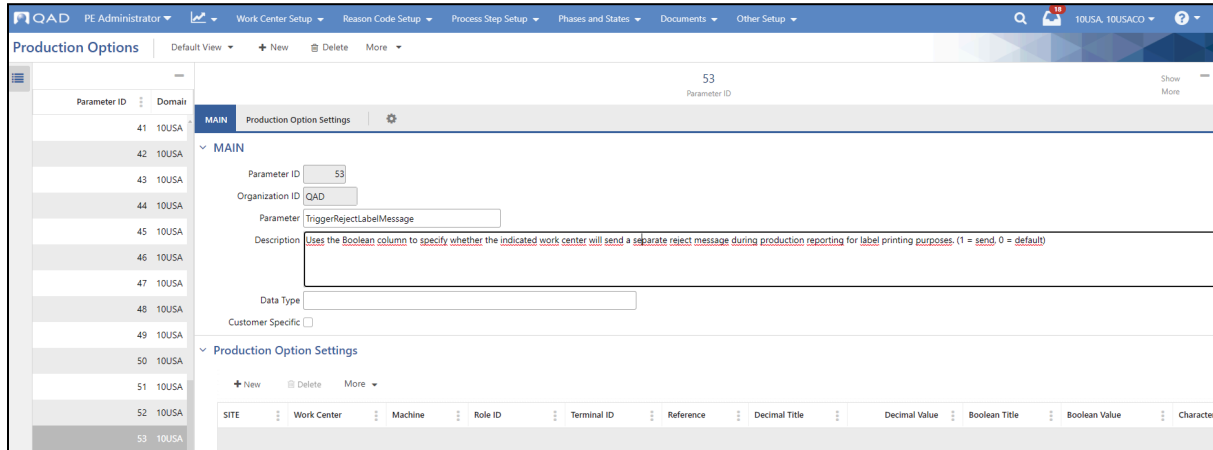
Set up the label prefix that will be trimmed for printing and then print the label:

1. In **Production Options** (InventoryTrimLabelPrefix), enter Boolean Value = 1.
2. Log into PE.
3. Print a label and validate if the prefix was printed correctly.

## Trigger Reject Label Message

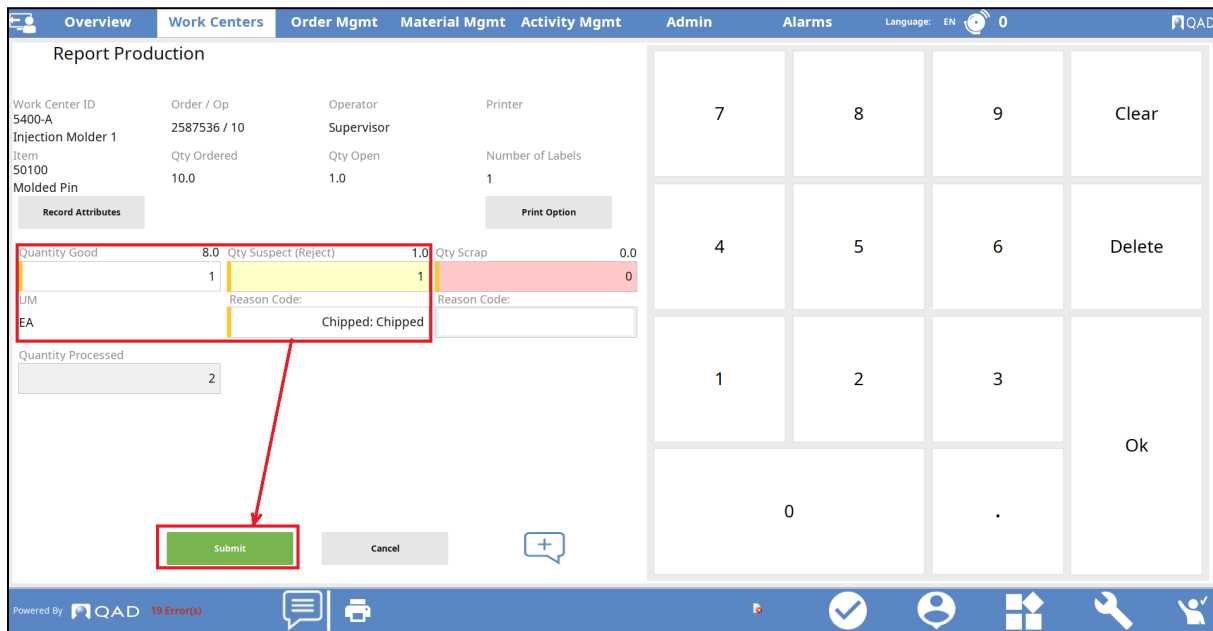
### Purpose

The Trigger Reject Label Message production option allows the user to specify whether the indicated work center sends a separate reject message during production reporting for label printing purposes.



### Where

The production option is applied when reporting production.



### Setting

Enter the Boolean Value for this option:

- If Boolean =1, a separate reject message is sent to print the label.
- If Boolean = 0, a separate reject message is NOT sent. This is the default setting.

### Setup

Field	Setting
Parameter ID	53
Parameter	TriggerRejectLabelMessage
Description	Uses the Boolean column to specify whether the indicated work center will send a separate reject message during production reporting for label printing purposes. (1 = send, 0 = default)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Trigger Reject Label Message Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• <b>1.</b> A separate reject message is sent to print the label.</li> <li>• <b>0.</b> A separate reject message is NOT sent.</li> </ul>

### Example

Perform Production Reporting with good and reject quantity. Validate if a separate reject label was printed.

1. In **Production Options** (TriggerRejectLabelMessage), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (7)	50100 Molded Pin	3.0%	51	Open	Available	Supervisor	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available	Supervisor	0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	10	Open	Available		0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

4. Navigate to the Production Orders screen and select the production order against which production is to be reported.

The screenshot shows the 'Work Centers' overview screen. At the top, there are tabs for Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The main header displays 'Available' equipment state, '5400-A' as the Work Center ID, and 'Injection Molder 1' as the Work Center Name. A supervisor is identified as 'Supervisor (1)'. Below this, there are filters for Production Orders, Order View, Inventory, Equipment, and Material Request. A summary bar shows 44 Open, 7 Active, 2 Upstream, and 1 Rework orders. The main table lists production orders with columns for Order ID, Op, R, C, Type, Item, Operation Phase, Operator Action, Report, Material Action, Release Date, Due Date, Perform To Rate, Std. Rate, Order Qty, Remaining Qty, Last Processed Qty, Prev Op Qty, and Last Date. The order 2587536-10 is highlighted in red, showing a 'Production' phase and a 'Report' icon (pencil) next to the Operator Action.

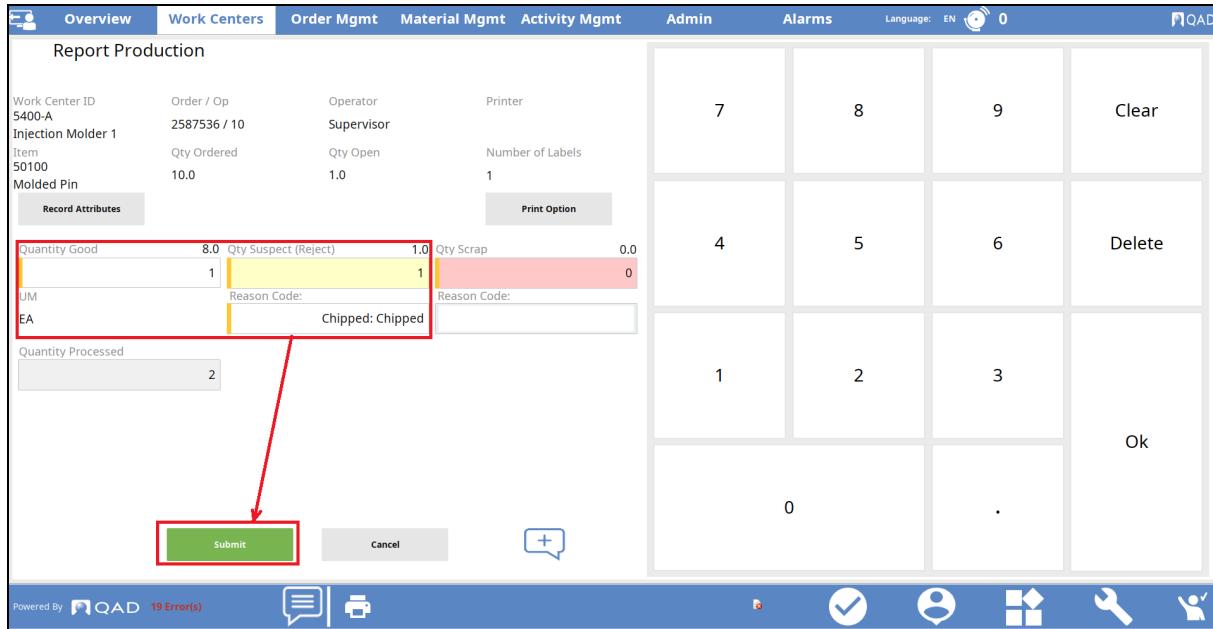
Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583996-10				50100	Setup				10/9/2020	10/9/2020		100	15	10			
2583998-10				50100	Setup				11/5/2020	11/5/2020		100	20	19			
2584019-10				50100	Setup				2/18/2021	2/18/2021		100	50	50			
2584022-10				50100	Setup				2/23/2021	2/23/2021		100	50	38			
2587536-10				50100	Production				3/2/2021	3/2/2021	0.4%	100	10	1	2		4/9/2021
2587544-10				50100	Production				3/10/2021	3/10/2021		100	10	10			
2583995-10				50100	Equip Stopped				10/7/2020	10/7/2020	144.58%	100	10	0			

5. In the Order View screen, select the Pencil button to report production.

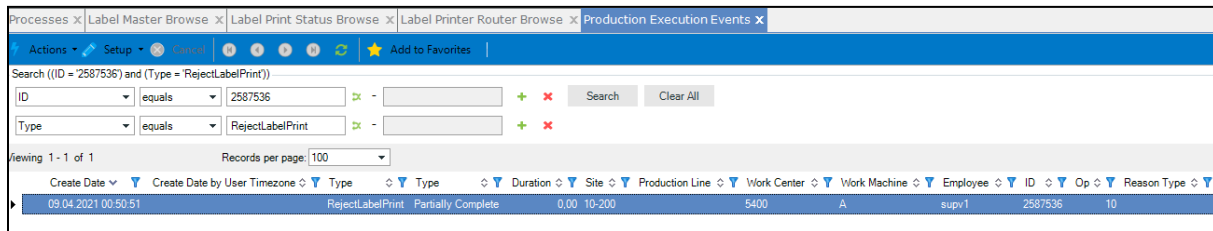
The screenshot shows the 'Order View' screen for order 2587536-10. The top navigation and header are identical to the previous screenshot. The main table shows details for the selected order, including Item (50100 Molded Pin), Operational Phase (Production), Operator Action (red square), and Report (pencil icon, highlighted with a red box). The table also shows Due Date (3/2/2021), Perform To Rate (0.4%), Std. Rate, QTY Open (100), Good (1), In Reject (8), and Scrapped (1). Below the main table, there are sections for Process Steps, Documents, and Recent Activity. The Process Steps section shows a list of steps with their status and time. The Documents section shows a list of documents with their dates. The Recent Activity section shows a log of events such as 'Up', 'Down state ended', 'User Supervisor logged in on workcenter', and 'User Supervisor logged out on workcenter'.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2587536-10	50100 Molded Pin	Production				3/2/2021	0.4%		100	1	8	1

6. Report production with good and reject quantities.



7. Verify that a label for the reject quantity was printed.



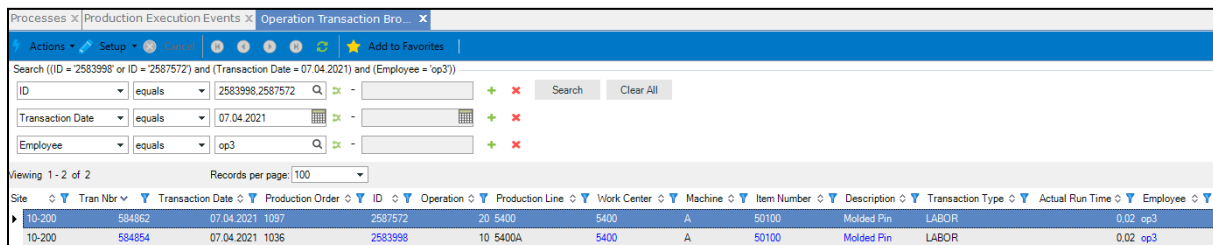
## Enable Labor Reporting

### Purpose

The Enable Labor Reporting production option allows the user to specify whether labor reporting is enabled for the site.

### Where

Run time is accrued for users that are currently logged in at a specified work center and when the production orders are in the active phase (Production). The phase, which the run time is accrued against, is set up in the Operation Phases screen in QAD Adaptive ERP. Labor reporting can be viewed in the Operation Transaction Browse (16.13.18) when filtering for Labor transaction type.



### Setting

Enter the Boolean Value for this option:

- If Boolean =1, then Labor reporting is enabled for the site.
- If Boolean = 0, then Labor reporting is disabled for the site.

**Setup**

Field	Setting
Parameter ID	33
Parameter	EnableLaborReporting
Description	Uses the Boolean column to specify whether labor reporting is enabled for the site. 1=True, 0=False
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Enable Labor Reporting Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• 1. Labor reporting is enabled for the site.</li> <li>• 0. Labor reporting is disabled for the site.</li> </ul>

**Example**

Follow these steps to enable labor reporting and then verify whether the labor time is accrued against specified production operation phases:

1. In **Production Options** (EnableLaborReporting), enter Boolean Value = 1 (Labor enabled).
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587544 (13)	50100 Molded Pin	0.0%	28	Open	Available	Op1 (2)	0
5400-B Injection Molder 2		2587567 (8)	50100 Molded Pin	0.0%	13	Open	Available	Op1 (2)	0
5400-C Injection Molder 3		mgw0406b (2)	mgw-fg Testing Finished Good	0.0%	2	Setup	Available	Op1	0
5500-A Assembly Cell 1		2584016 (6)	00100 Pin Assembly - Star	0.0%	8	Open	Available	Op1	0
5500-B Assembly Cell 2		2587542	00101 Pin Assembly - Gear	0.0%	3	Open	Down	Op1	0
5900 Heat Treat				0.0%	0		Available		0

4. Log into the work center.

**User Actions**

Select one:

- Log Into Work Center
- Report Non-productive Time

OK Cancel

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action
mgw0406b-10				mgw-fg	Setup	⏹
mgw0406c-10				mgw-fg	Setup	⏹
2583998-10				50100	Production	⏹
2587572-20				50100	Production	⏹
mgw0406a-10				50100	Teardown	⏹
2583996-10				50100	Equip Stopped	▶
1434-10				311	Equip Stopped	▶
2584019-10				50100	Equip Stopped	▶
2584020-10				50100	Equip Stopped	▶

Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
100	100			
100	100			
20	19	1	0	4/7/2021
10	9	1	0	4/6/2021
100	95	5		4/6/2021
15	10	5		4/6/2021
100	90	1		4/5/2021
50	50			
100	55	20		2/23/2021

**Sign in to QAD**

Username  
op3

Password

Sign In

Cancel

5. Check which production orders are in the “Production” operation phase.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Qty	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
mgw0406b-10				mgw-fg	Setup			●●●	4/6/2021 4/6/2021			100	100	100			
mgw0406c-10				mgw-fg	Setup			●●●	4/6/2021 4/6/2021			100	100	100			
2583998-10				50100	Production			●●●	11/5/2020 11/5/2020		0%	100	20	19	1		4/7/2021
2587572-20				50100	Production			●●●	4/6/2021 4/6/2021			0	10	9	1	0	4/6/2021
mgw0406a-10				50100	Teardown			●●●	4/6/2021 4/6/2021		0.57%	100	100	95	5		4/6/2021
2583996-10				50100	Equip Stopped			●●●	10/9/2020 10/9/2020		0.01%	100	15	10	5		4/6/2021
1434-10				311	Equip Stopped			●●●	2/1/2021 2/1/2021		0.07%	25	100	90	1		4/5/2021
2584019-10				50100	Equip Stopped			●●●	2/18/2021 2/18/2021		0%	100	50	50			
2584020-10				50100	Equip Stopped			●●●	2/19/2021 2/19/2021		0.06%	100	100	55	20		2/23/2021

- Log out from the work center and navigate to the Operation Transaction Browse (16.13.18). Verify that Labor time for this user was counted against production orders in the Production phase.

Site	Tran Nbr	Transaction Date	Production Order	ID	Operation	Production Line	Work Center	Machine	Item Number	Description	Transaction Type	Actual Run Time	Employee
10-200	584852	07.04.2021	1097	2587572	20	5400	5400	A	50100	Molded Pin	LABOR	0.02	op3
10-200	584854	07.04.2021	1036	2583998	10	5400A	5400	A	50100	Molded Pin	LABOR	0.02	op3

## Hide Reference On Report

### Purpose

The Hide Reference On Report production option allows the user to specify whether the Reference (Ref) field is visible or hidden on the Production Reporting screen.

57 Uses the Boolean column to specify whether the Ref field will be hidden from the production reporting screen. (1 = Hidden, 0 = Not hidden, default: 0)

Parameter ID: 57  
 Organization ID: QAD  
 Parameter: HideReferenceOnReport  
 Description: Uses the Boolean column to specify whether the Ref field will be hidden from the production reporting screen. (1 = Hidden, 0 = Not hidden, default: 0)  
 Data Type: [ ]  
 Customer Specific:

Production Option Settings

SITE	Work Center	Machine	Role ID	Terminal ID	Reference	Decimal Title	Decimal Value	Boolean Title	Boolean Value	Character
------	-------------	---------	---------	-------------	-----------	---------------	---------------	---------------	---------------	-----------

## Where

The production option is applied to the Production Reporting screen.

The screenshot displays the 'Report Production' interface. At the top, there are navigation tabs: Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, Alarms, and Language: EN. The main content area includes fields for Work Center ID (5400-C), Order / Op (2587597 / 40), Operator (SFAdmin), and Printer. Below these are fields for Item (mgw-fg), Qty Ordered (10.0), Qty Open (10.0), and Number of Labels (1). A 'Print Option' button is present. The 'Quantity Good' field is set to 0.0, 'Qty Suspect (Reject)' is 0.0, and 'Qty Scrap' is 0.0. There are also fields for 'Reason Code' and 'Quantity Processed' (0). At the bottom, there are 'Lot Number' and 'Ref' fields, with the 'Ref' field highlighted by a red box. A numeric keypad with buttons 0-9, Clear, Delete, and Ok is on the right. The bottom status bar shows 'Powered By QAD 0 Error(s)' and various system icons.

## Setting

Enter the Boolean Value for this option:

- If Boolean = 1, then the Reference field is not accessible on the production reporting screen by the user.
- If Boolean = 0, then the Reference field is accessible by the user on the production reporting screen. This is the default setting.

## Setup

Field	Setting
Parameter ID	57
Parameter	HideReferenceOnReport
Description	Uses the Boolean column to specify whether the Ref field will be hidden from the production reporting screen. (1 = Hidden, 0 = Not hidden, default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Hide Reference On Report Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• <b>1.</b> Reference field is not accessible on the production reporting screen by the user.</li> <li>• <b>0.</b> Reference field is accessible by the user on the production reporting screen.</li> </ul>

## Example

Follow these steps to navigate to the Production Reporting screen and verify if the Reference field is accessible by user.

1. In **Production Options** (HideReferenceOnReport), enter Boolean Value = 1.
2. Log into PE.
3. Log into the production entity against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (10)	50100 Molded Pin	1.0%	52	Open	Available		0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available		0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	11	Open	Available		0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

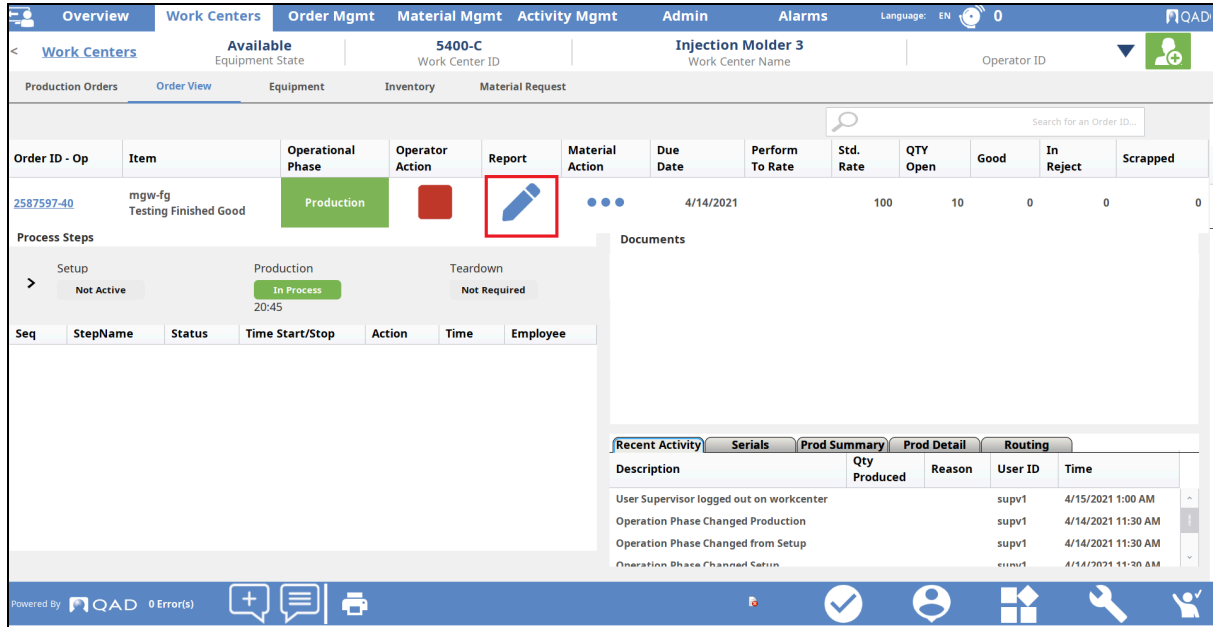
Powered By QAD

4. Navigate to the Production Orders screen for the work center and select the production order you want to report production against.

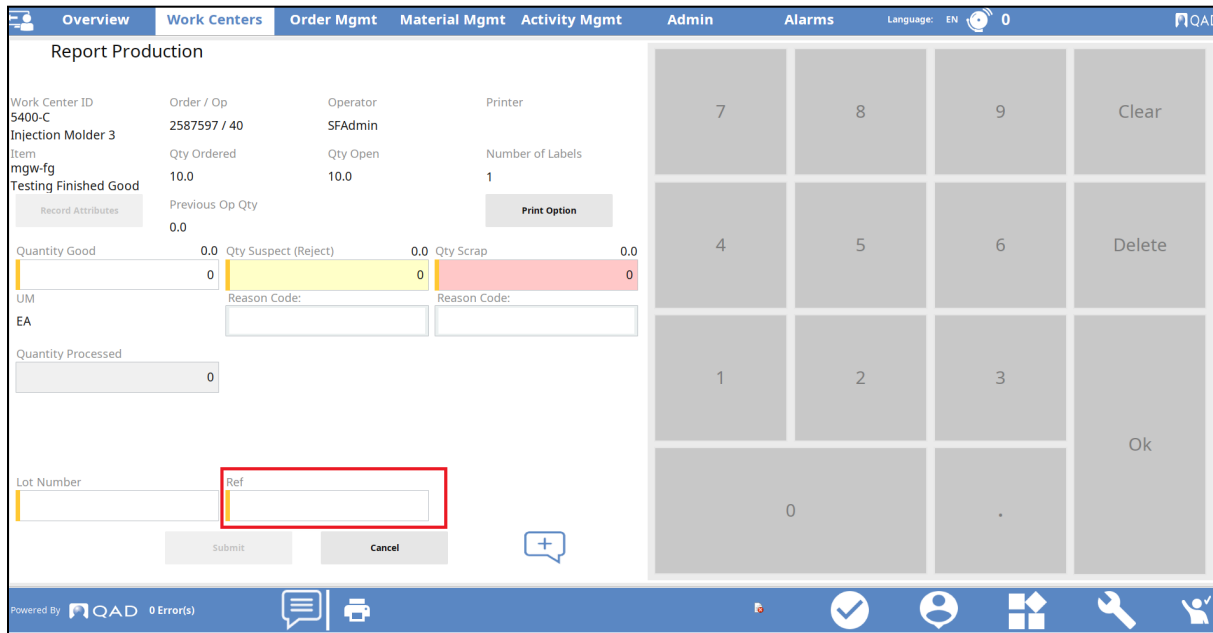
Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD								
Available Equipment State		5400-C Work Center ID		Injection Molder 3 Work Center Name		Operator ID											
Production Orders		Order View	Equipment	Inventory	Material Request												
10 Open		1 Active		2 Upstream						Search for an Order ID...							
Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587597-40				mgw-fg	Production				4/14/2021	4/14/2021	100	10	10	10	0		

Powered By QAD 0 Error(s)

5. Navigate to the Production Reporting screen by selecting the Pencil button.



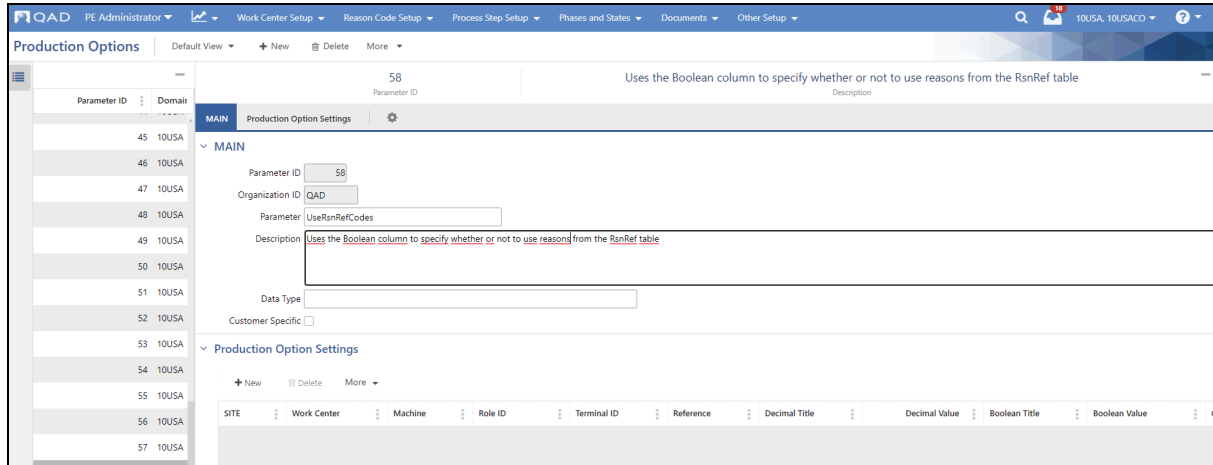
- Verify that the Reference field is visible and the operator can add reference details when reporting production.



## Use Rsn Ref Codes

### Purpose

The Rsn Ref Codes production option allows the user to specify whether or not to use reason codes from the Reason Reference (rsn\_ref) table.



**Where**

The production option is applied to any PE screen where Reason Codes are displayed.

**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, then the Reason Codes from the reason reference (rsn\_ref) table will be used.
- If Boolean = 0, then the Reason Codes from the reason reference (rsn\_ref) table will NOT be used. This is the default setting.

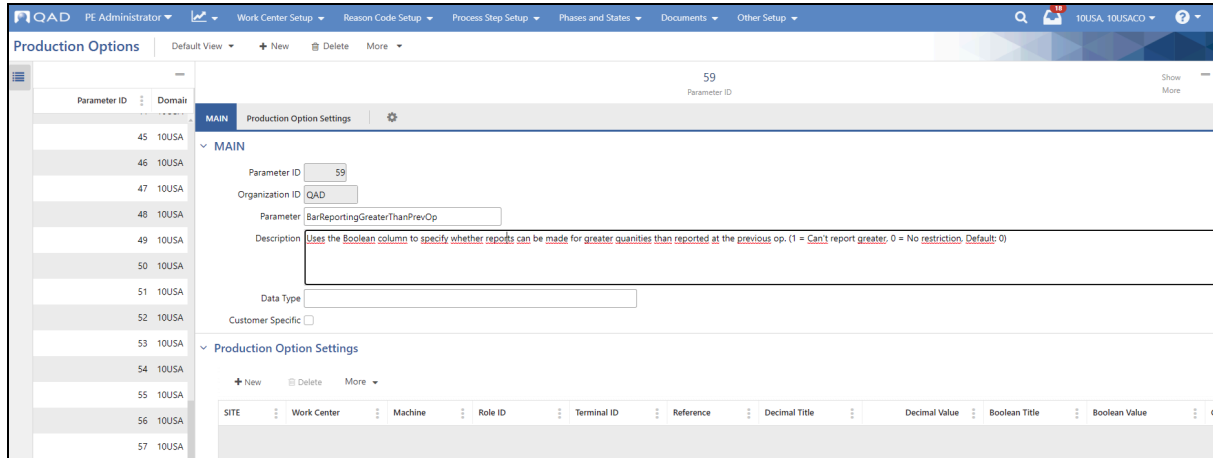
**Setup**

Field	Setting
Parameter ID	58
Parameter	UseRsnRefCodes
Description	Uses the Boolean column to specify whether or not to use reasons from the RsnRef table.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Use Rsn Ref Codes Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• <b>1.</b> Reason Codes from the reason reference (rsn_ref) table will be used.</li> <li>• <b>0.</b> Reason Codes from the reason reference (rsn_ref) table will NOT be used. This is the default setting.</li> </ul>

**Bar Reporting Greater Than Prev Op**

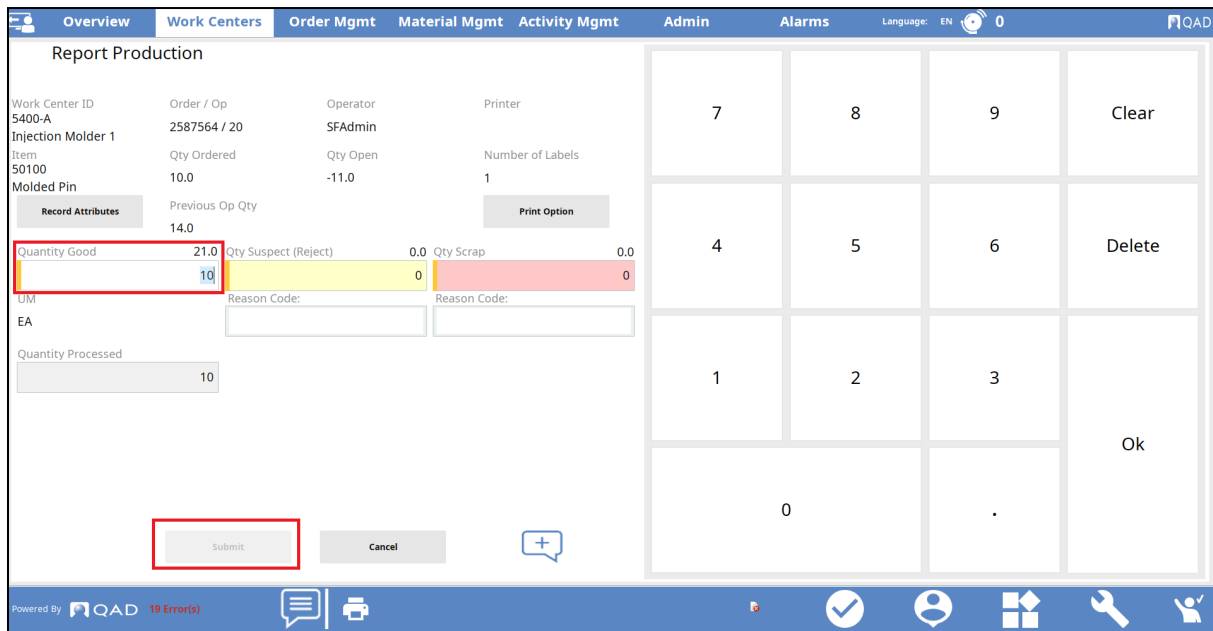
**Purpose**

The Bar Reporting Greater Than Prev Op production option allows the user to specify whether production reports can be made for greater quantities than reported at the previous operation.



**Where**

The production option is applied to the Report Production screen.



**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, then the production report can NOT be made for greater quantity than in the previous operation.
- If Boolean = 0, then there are no restrictions for production reporting quantities. This is the default setting.

**Setup**

Field	Setting
Parameter ID	59

Parameter	BarReportingGreaterThanPrevOp
Description	Uses the Boolean column to specify whether reports can be made for greater quantities than reported at the previous op. (1 = Can't report greater, 0 = No restriction, Default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Bar Reporting Greater Than Prev Op Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>● 1. Production report can NOT be made for a greater quantity than in the previous operation.</li> <li>● 0. There are no restrictions for production reporting quantities.</li> </ul>

**Example**

Follow these steps to report production on the first and second operations, where the quantity reported is greater on the second operation:

1. In **Production Options** (BarReportingGreaterThanPrevOp), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

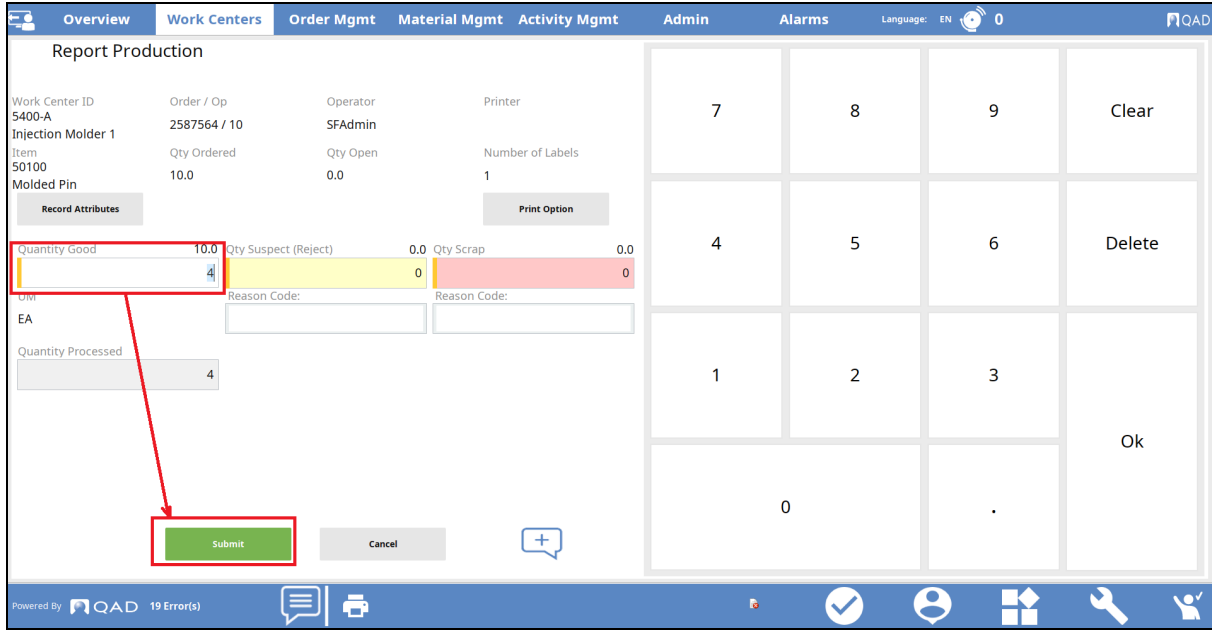
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (9)	50100 Molded Pin	1.0%		53 Open	Available	SFAdmin	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%		30 Open	Available	SFAdmin	0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%		11 Open	Available	Supervisor	0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%		16 Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%		6 Open	Available		0
5900 Heat Treat				0.0%		0	Available		0

4. Navigate to the Production Orders screen and select a production order with more than one operation to report production against.

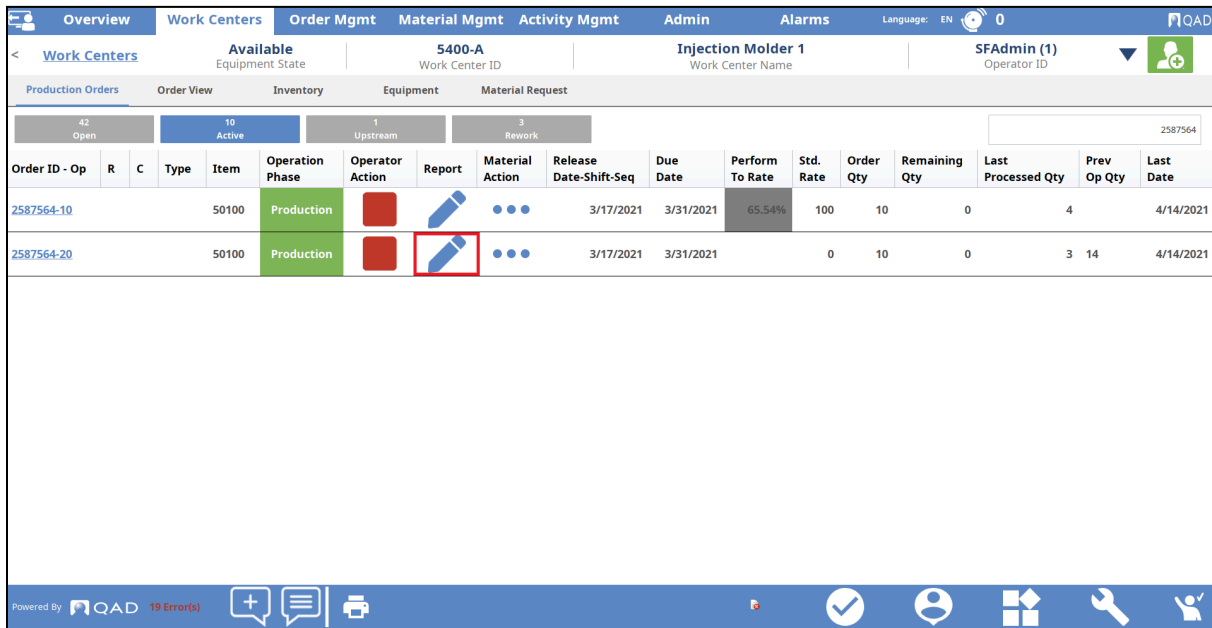
Overview		Work Centers		Order Mgmt		Material Mgmt		Activity Mgmt		Admin		Alarms		Language: EN 0		QAD	
Work Centers				Available Equipment State		5400-A Work Center ID		Injection Molder 1 Work Center Name		SFAdmin (1) Operator ID							
Production Orders		Order View		Inventory		Equipment		Material Request									
42 Open		10 Active		1 Upstream		3 Rework										2587564	
Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587564-10				50100	Production				3/17/2021	3/31/2021		100	10	0			
2587564-20				50100	Production				3/17/2021	3/31/2021		0	10	0	3	10	4/14/2021

5. Report production on the first operation of the production order.

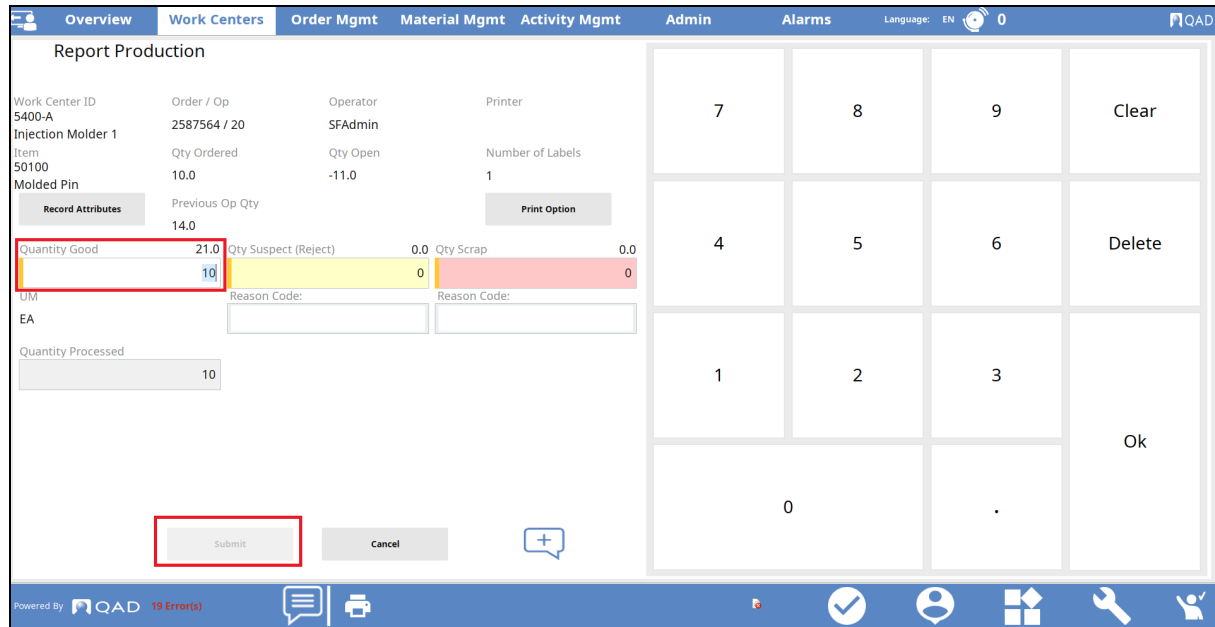
Overview		Work Centers		Order Mgmt		Material Mgmt		Activity Mgmt		Admin		Alarms		Language: EN 0		QAD	
Work Centers				Available Equipment State		5400-A Work Center ID		Injection Molder 1 Work Center Name		SFAdmin (1) Operator ID							
Production Orders		Order View		Inventory		Equipment		Material Request									
42 Open		10 Active		1 Upstream		3 Rework										2587564	
Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587564-10				50100	Production				3/17/2021	3/31/2021		100	10	0			
2587564-20				50100	Production				3/17/2021	3/31/2021		0	10	0	3	10	4/14/2021



6. Navigate to the Report Production screen on the next operation for this production order.



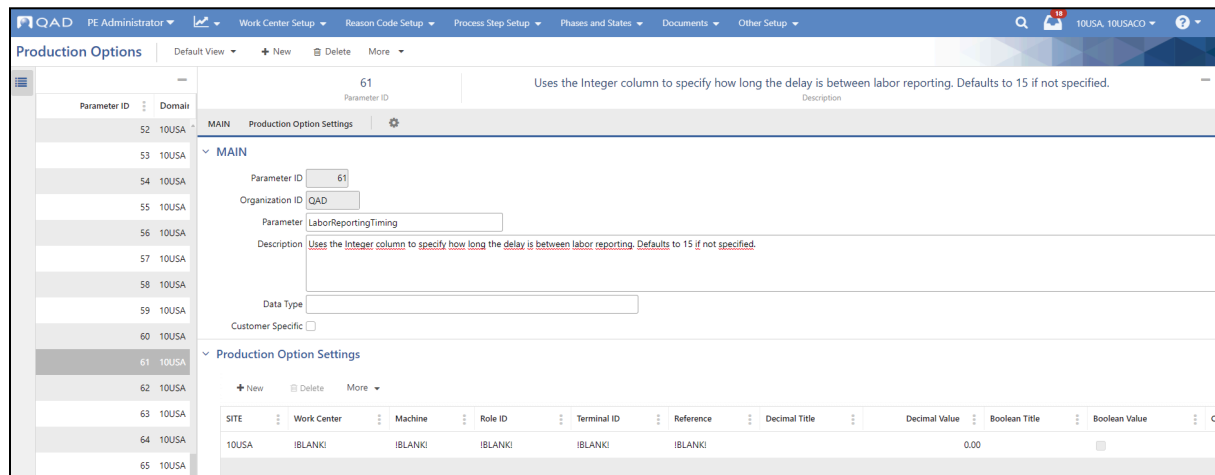
7. Report production with a quantity greater than on the previous operation and verify you cannot report production for this operation because the quantity is greater than was reported on the previous operation.



## Labor Reporting Timing

### Purpose

The Labor Reporting Timing production option allows the user to specify the length of the delay (in minutes) between labor reporting.



### Setting

Enter the Integer Value which specifies the period of time (in minutes) that must pass before the user reports labor again. For example, if the Integer Value = 10, then 10 minutes must pass before the user can report labor again.

### Setup

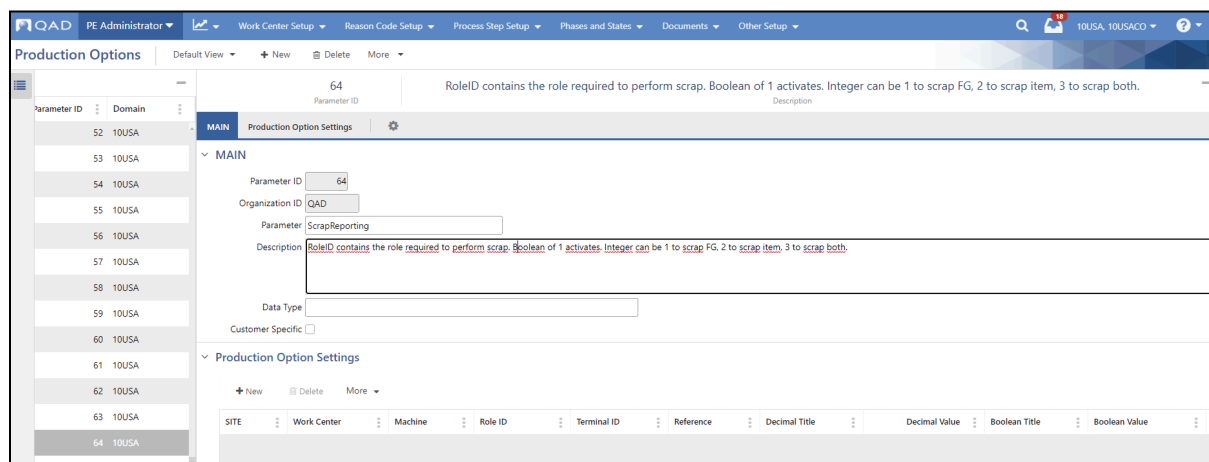
Field	Setting
Parameter ID	61

Parameter	LaborReportingTiming
Description	Uses the Integer column to specify how long the delay is between labor reporting. Defaults to 15 if not specified.
Integer Title	Enter the setup details associated with the Integer Value. For Labor Reporting Timing Option the integer value is critical, therefore entering instruction can be useful.
Integer Value	Enter the Integer Value for this option to specify the period of time (in minutes) that must pass before reporting labor again. For example, if the Integer Value = 10, then 10 minutes must pass before reporting labor again.  <b>Note:</b> The default Integer Value is 15.

## Scrap Reporting

### Purpose

The Scrap Reporting production option allows the user to specify the user role that is authorized to report production with scrap quantities for finished items, semi-finished items, or both.



### Where

The production option is applied to the Production Reporting screen.

The screenshot displays the 'Report Production' screen in the QAD system. The top navigation bar includes 'Overview', 'Work Centers', 'Order Mgmt', 'Material Mgmt', 'Activity Mgmt', 'Admin', and 'Alarms'. The main form area contains the following fields and sections:

- Work Center ID:** 5400-A
- Order / Op:** 2587564 / 10
- Operator:** SFAdmin
- Printer:** (empty)
- Item:** Injection Molder 1
- Qty Ordered:** 10.0
- Qty Open:** -16.0
- Number of Labels:** 1
- Molded Pin:** (empty)
- Record Attributes:**
  - Quantity Good: 26.0
  - Qty Suspect (Reject): 0.0
  - Qty Scrap: 0.0
- Reason Code:** (Two input fields, the second one is highlighted with a red box)
- Quantity Processed:** 0
- Buttons:** Submit, Cancel, Print Option, and a numeric keypad (0-9, Clear, Delete, Ok).

The bottom status bar shows 'Powered By QAD 19 Error(s)' and various system icons.

## Setting

Enter the Role ID, Boolean Value, and Integer Value for this production option:

- **Role ID.** Specifies the role that can report production with scrapped quantities.
- **Boolean Value.** Specifies if the option is activated for entered Role ID:
  - If Boolean =1, then the user is allowed to report production with scrap quantity.
  - If Boolean = 0, then the user is NOT allowed to report production with scrap quantity.
- **Integer Value.** Specifies which production item can be scrapped if the user can report scrapped items (Boolean = 1). The following options are available:
  - If Integer = 1, the user can report scrapped quantities for finished items.
  - If Integer = 2, the user can report scrapped quantities for semi-finished items.
  - If Integer = 3, the user can report scrapped quantities for finished items and semi-finished items.

## Setup

Field	Setting
Parameter ID	64
Parameter	ScrapReporting
Role ID	Enter the Role ID against which the production option is to be applied for. Leave the field blank in order to apply the option for all roles at the specified production entity.
Description	RoleID contains the role required to perform scrap. Boolean of 1 activates. Integer can be 1 to scrap FG, 2 to scrap item, 3 to scrap both.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Scrap Reporting Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option:

	<ul style="list-style-type: none"> <li>1. Then the user is allowed to report production with scrap quantity.</li> <li>0. Then the user is NOT allowed to report production with scrap quantity.</li> </ul>
Integer Title	Enter the setup details associated with the Integer Value. For Scrap Reporting Option the integer value is critical, therefore entering instruction can be useful.
Integer Value	<p>The Integer Value specifies which production item can be scrapped if the user can report scrapped items (Boolean = 1). The following options are available:</p> <ul style="list-style-type: none"> <li>1. The user can report scrapped quantities for finished items.</li> <li>2. The user can report scrapped quantities for semi-finished items.</li> <li>3. The user can report scrapped quantities for finished items and semi-finished items.</li> </ul>

**Example**

Follow these steps to report production with scrap quantities:

- In **Production Options** (ScrapReporting), enter the following Role ID, Boolean Value, and Integer Value:
  - Role ID = All (\*)
  - Boolean Value = 1
  - Integer Value = 3
- Log into PE.
- Log into the work center against which you applied the setting.

Overview									
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (9)	50100 Molded Pin	1.0%		53 Open	Available	SFAdmin	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%		30 Open	Available	SFAdmin	0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%		11 Open	Available	Supervisor	0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%		16 Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%		6 Open	Available		0
5900 Heat Treat				0.0%		0	Available		0

- Navigate to the Production Orders screen and select the production order that the scrap quantity is to be reported to.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587564-10				50100	Production				3/17/2021 3/31/2021	3/31/2021	31.65%	100	10	0	3		4/14/2021
2587564-20				50100	Production				3/17/2021 3/31/2021	3/31/2021		0	10	0	3	26	4/14/2021
2583995-10				50100	Equip Stopped				10/7/2020 10/7/2020	10/7/2020	144.58%	100	10	0			
2583996-10				50100	Equip Stopped				10/9/2020 10/9/2020	10/9/2020		100	15	10			
2583998-10				50100	Equip Stopped				11/5/2020 11/5/2020	11/5/2020		100	20	19			
2584019-10				50100	Equip Stopped				2/18/2021 2/18/2021	2/18/2021		100	50	50			
2584022-10				50100	Equip Stopped				2/23/2021 2/23/2021	2/23/2021		100	50	38			
2587536-10				50100	Equip Stopped				3/2/2021 3/2/2021	3/2/2021	0.08%	100	10	1	2		4/9/2021
2587544-10				50100	Equip Stopped				3/10/2021 3/10/2021	3/10/2021	0%	100	10	10			

5. Navigate to the Report Production screen for selected production order by selecting the Pencil button.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2587564-10	50100 Molded Pin	Production				3/31/2021	31.65%	100	-16	26	0	0

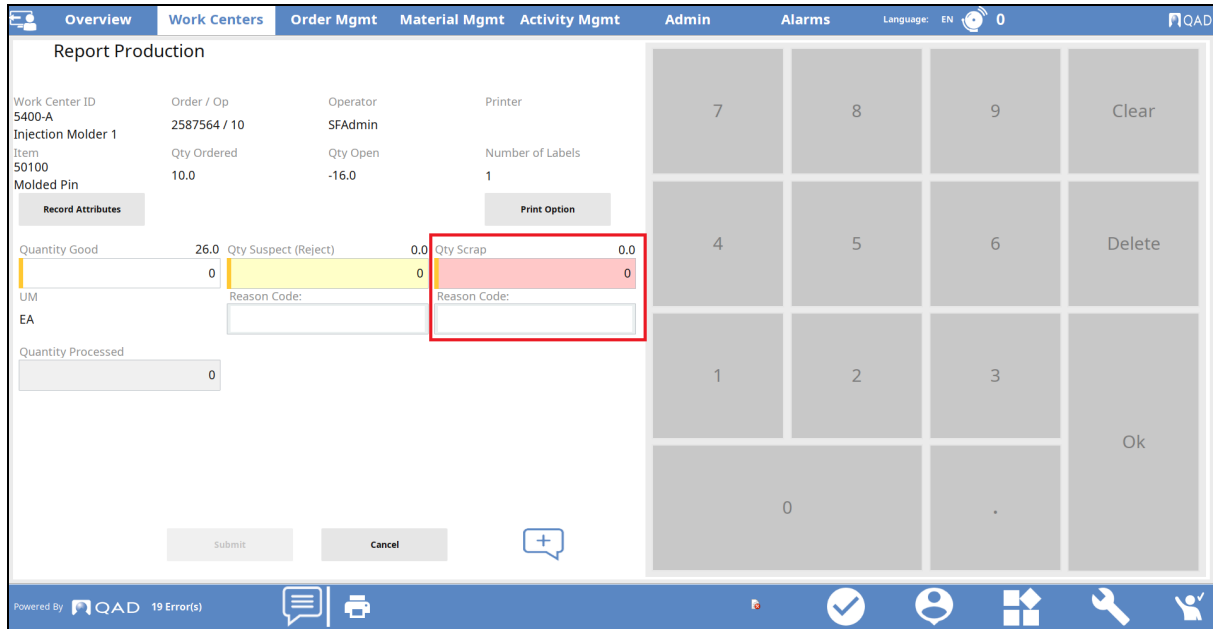
  

Seq	StepName	Status	Time Start/Stop	Action	Time	Employee
1	Visual Insp-100%					
2	Visual Insp-hourly	Pending	-00:28			
3	OpenWebsite	Pending				

Recent Activity			Serials	Prod Summary	Prod Detail	Routing
Description	Qty Produced	Reason	User ID	Time		
Reported 3.0 on order 2587564-10	3		adminsft	4/14/2021 3:34 ...		
Reported 9.0 on order 2587564-10	9		adminsft	4/14/2021 3:33 ...		
Reported 4.0 on order 2587564-10	4		adminsft	4/14/2021 2:58 ...		
Operation Phase Changed Production			adminsft	4/14/2021 2:45 ...		

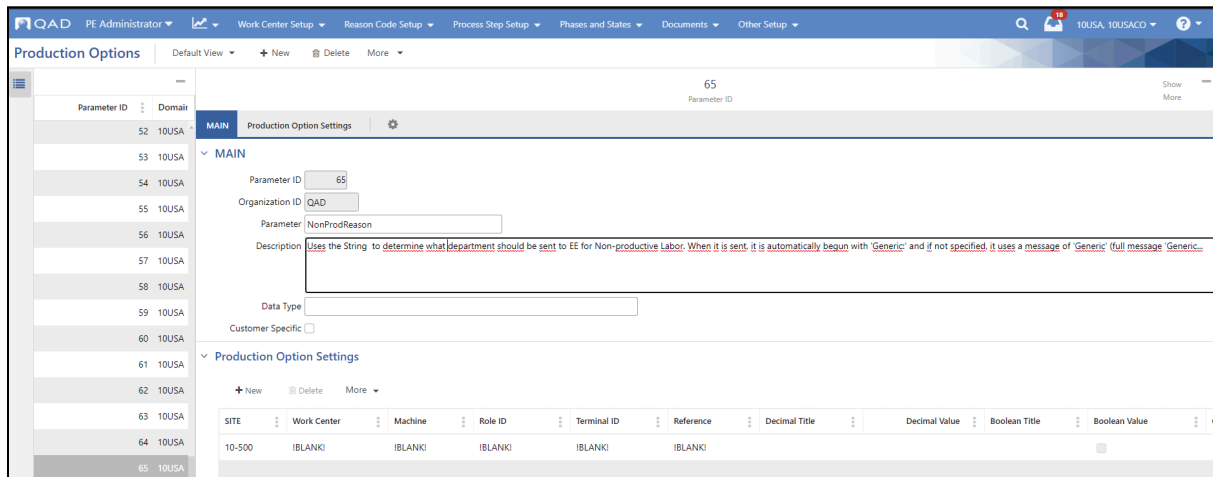
6. Verify that the Qty Scrap field is available and that users are allowed to enter and report scrap quantity.



## Non Prod Reason

### Purpose

The Non Prod Reason production option allows the user to specify which department is sent to QAD Adaptive ERP when reporting non-productive labor.



### Where

The production option is applied to all the browses in QAD Adaptive ERP which display the Department data associated with non-productive labor.

The screenshot shows the 'Report Non-productive Labor' dialog box in the QAD Production Execution interface. The 'Employee' field is highlighted with a red box and contains the value 'supv1' with a tooltip that says 'Supervisor'. A red arrow points from this field to the 'End Non-Productive' button, which is also highlighted with a red box. Other fields include Date (04/20/2021), Site (10-200), Shift (1), and Non-productive Task (102 Team). A numeric keypad is visible on the right side of the dialog.

## Setting

Enter the Character Value that identifies the department to which the non-productive labor is reported against. For example, if the Character value = 0160, then the non-productive labor would be reported against Department 0160.

**Note:** The default Department is set to Generic.

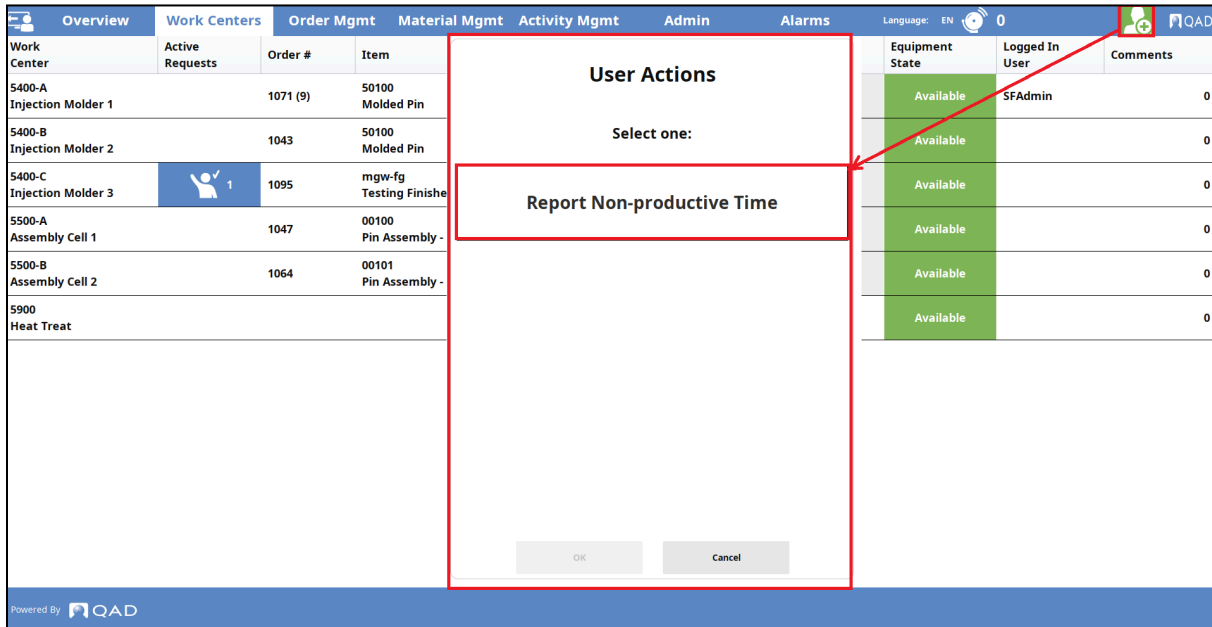
## Setup

Field	Setting
Parameter ID	65
Parameter	NonProdReason
Role ID	Enter the Role ID against which the production option is to be applied for. Leave the field blank in order to apply the option for all roles at the specified production entity.
Description	Uses the String to determine what department should be sent to EE for Non-productive Labor. When it is sent, it is automatically begun with 'Generic:' and if not specified, it uses a message of 'Generic' (full message 'Generic...)
Character Title	Enter the setup details associated with the Character Value. The Character value is critical for the Non Prod Reason Option, therefore entering the instructions is useful.
Character Value	Enter the Character Value that identifies the department to which the non-productive labor is reported against. For example, if the Character value = 0160, then the non-productive labor is reported against Department 0160. <b>Note:</b> The default Department is set to Generic.

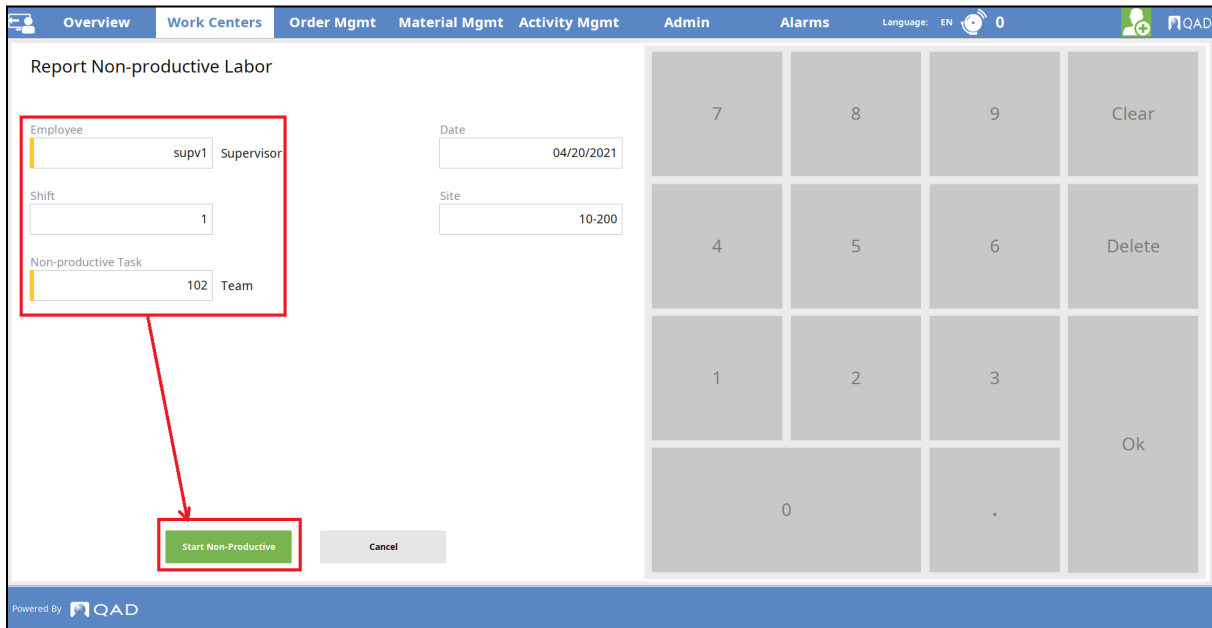
## Example

Follow these steps to report non-productive time and to verify that the correct Department is referenced in the QAD Adaptive ERP report:

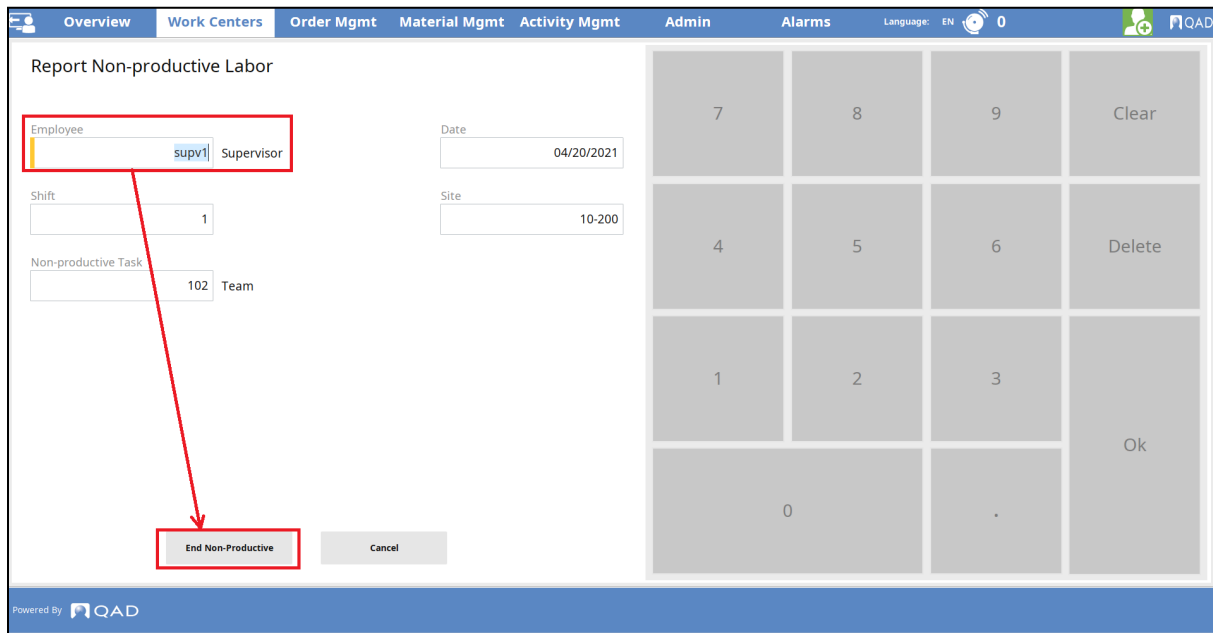
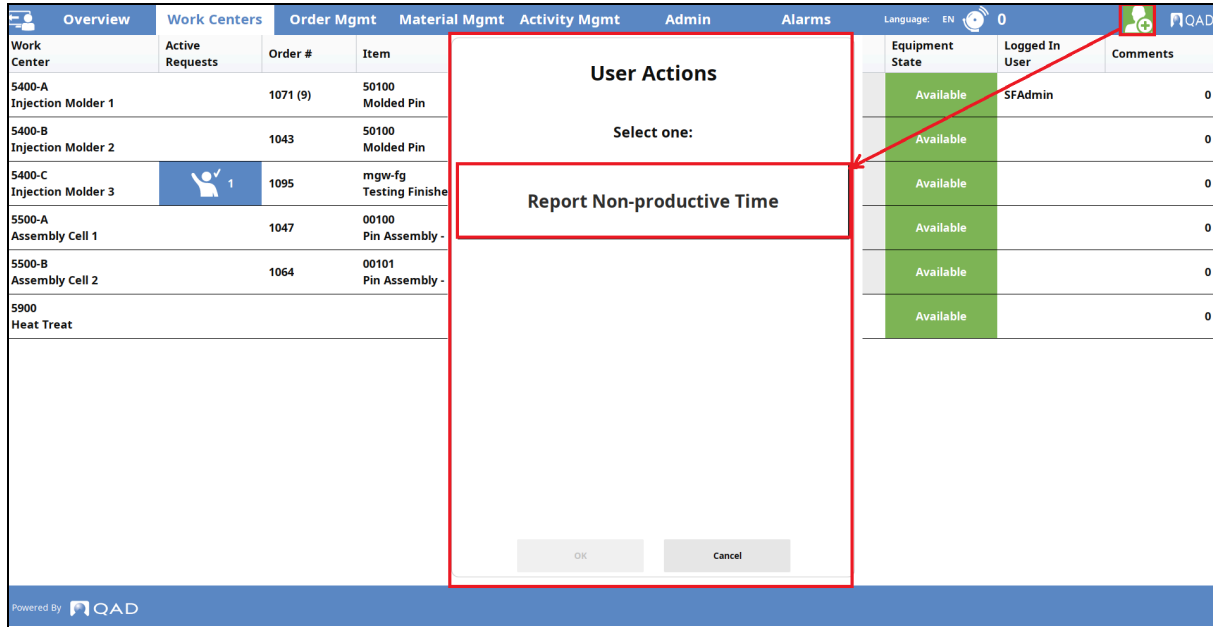
1. In **Production Options** (NonProdReason), enter Character Value = 0160.
2. Log into PE.
3. Log into the Entity against which you applied the setting.
4. Navigate to report non-productive time.



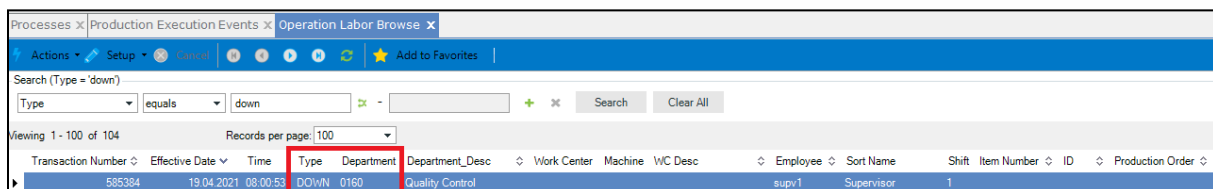
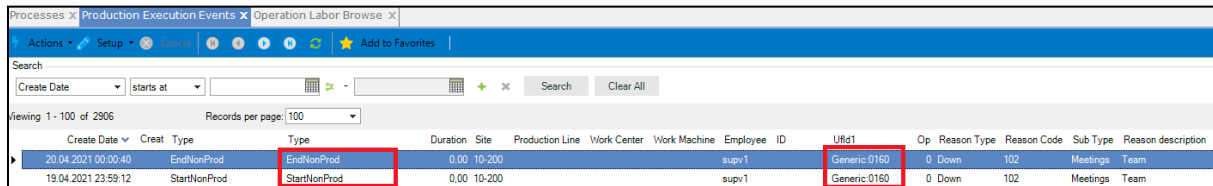
5. Report the start of non-productive time.



6. Report the end of non-productive time.



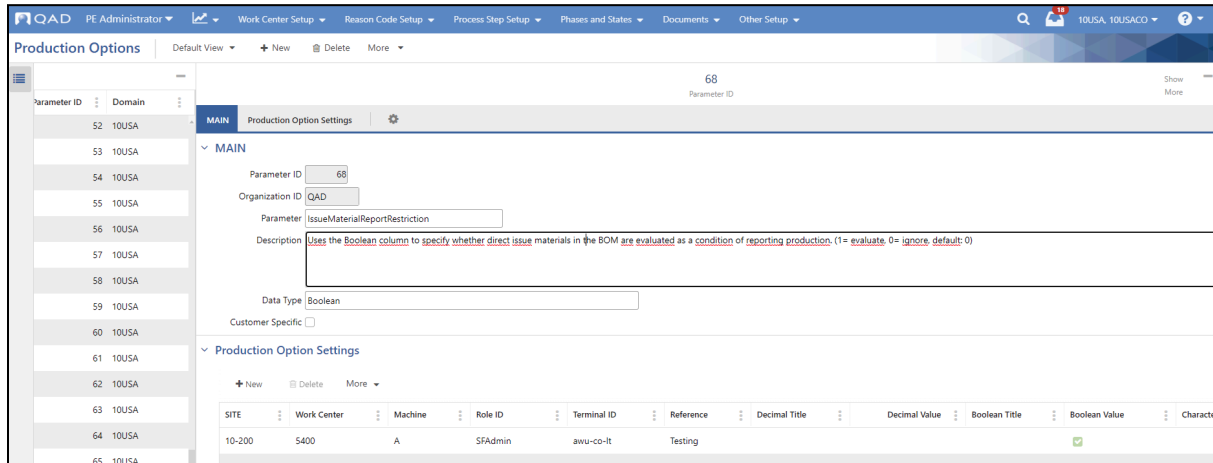
7. Verify in QAD Adaptive ERP that the non-productive activity was reported for Department 0160.



## Issue Material Report Restriction

### Purpose

The Issue Material Report Restriction production option allows the user to specify whether they can report production if material has or has not been issued to the work center in support of the active job.



### Where

The production option is applied to the Pencil button on the Production Orders and Order View screens.

### Setting

Enter the Integer Value which specifies whether the direct issue of materials in the BOM are evaluated as an obligatory condition of reporting production. The following options are available:

- If Integer Value = 0, then the report production option (Pencil button) is disabled and material issue not evaluated. This is the default setting.
- If Integer Value = 1, then the report production option (Pencil button) is only enabled on the Production Orders and Order View screens. The system does not check if materials have been issued during production reporting.
- If Integer Value = 2, then the report production option (Pencil button) is only enabled during production reporting and the user can initiate a production report.
- If Integer Value = 3, then the report production option (Pencil button) is fully enabled (combines functionality of Integer Values 1 and 2).

### Setup

Field	Setting
Parameter ID	68
Parameter	IssueMaterialReportRestriction
Description	Uses the Boolean column to specify whether direct issue materials in the BOM are evaluated as a condition of reporting production. (1= evaluate, 0= ignore, default: 0)

Integer Title	Enter the setup details associated with the Integer Value. For Issue Material Report Restriction Option the integer value is critical, therefore entering instruction can be useful.
Integer Value	<p>Enter the Integer Value for this option:</p> <ul style="list-style-type: none"> <li>• <b>0.</b> The report production option (Pencil button) is disabled and material issue not evaluated. This is the default setting.</li> <li>• <b>1.</b> The report production option (Pencil button) is only enabled on the Production Orders and Order View screens. The system does not check if materials have been issued during production reporting.</li> <li>• <b>2.</b> The report production option (Pencil button) is only enabled during production reporting and the user can initiate a production report.</li> <li>• <b>3.</b> The report production option (Pencil button) is fully enabled (combines functionality of Integer Values 1 and 2).</li> </ul>

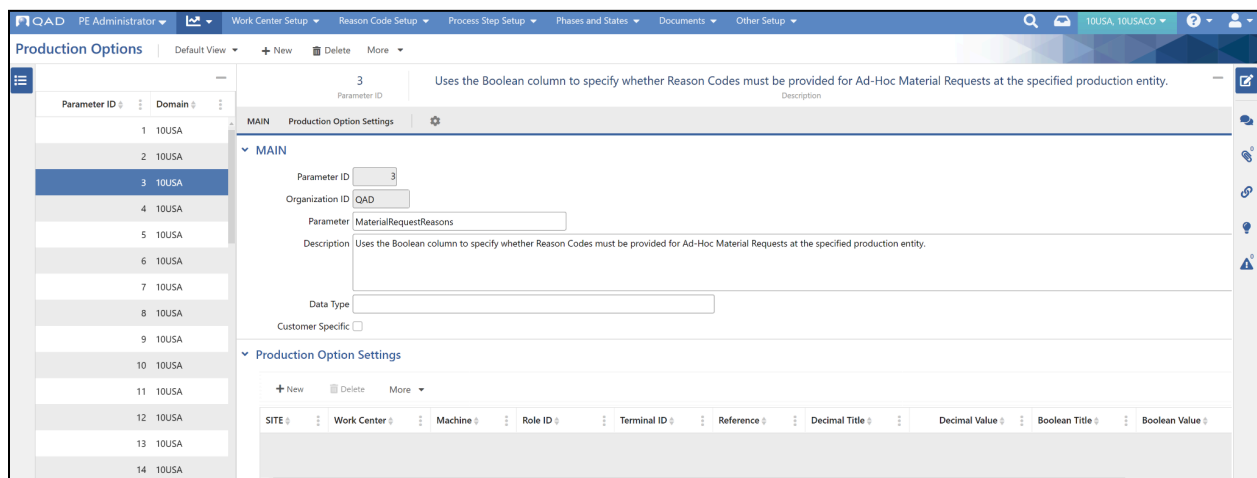
## Request Category

The following production options are related to production requests.

## Material Request Reasons

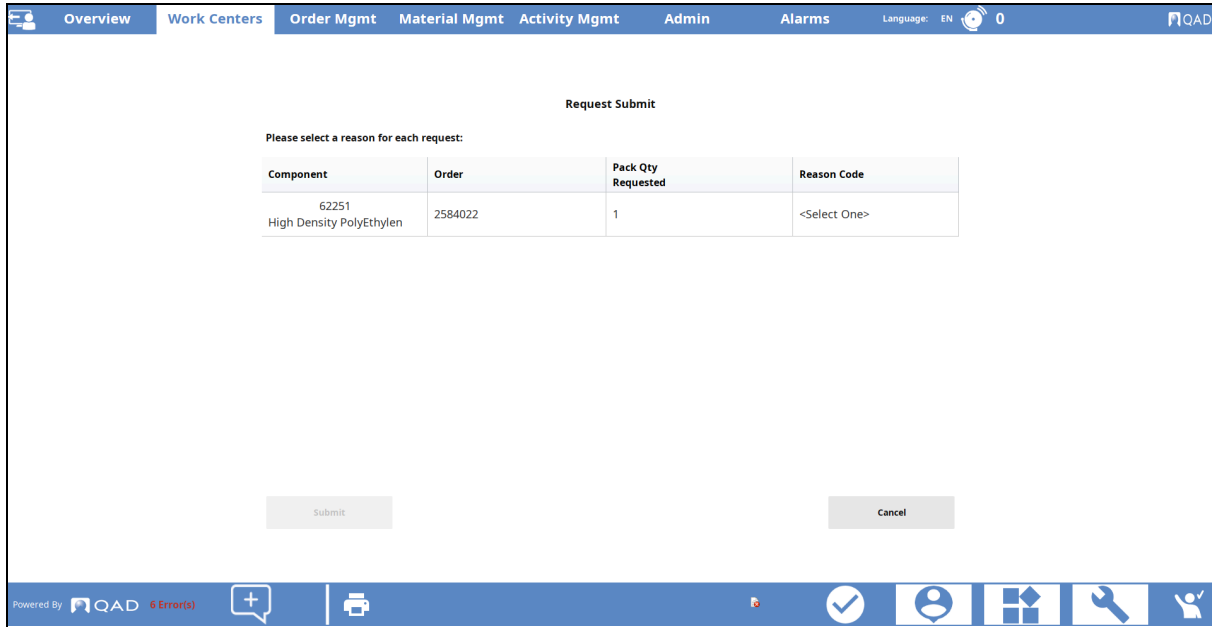
### Purpose

The Material Request Reasons production option allows the user to specify whether it is required that users enter reason codes when making ad-hoc material requests in PE.



### Where

The production option is applied to the Material Request screen when creating an ad-hoc material request for the components.



**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, the user is prompted to enter the reason code if triggering the material request.
- If Boolean = 0, the user is NOT prompted to enter the reason code if triggering the material request.

**Setup**

Field	Setting
Parameter ID	3
Parameter	MaterialRequestReasons
Description	Uses the Boolean column to specify whether Reason Codes must be provided for Ad-Hoc Material Requests at the specified production entity.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Material Requests Reasons Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• <b>1.</b> User is prompted to enter the reason code if triggering the material request</li> <li>• <b>0.</b> User is NOT prompted to enter the reason code if triggering the material request.</li> </ul>

**Example**

Follow these steps to request the material at the specified work center:

1. In **Production Options** (MaterialRequestReasons), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Mold Mach A	3	2584021 (4)	50200 Large Bushing	12.0%	4	Production	Available	SF Admin	0
5400-C Injection Mold Mach C				0.0%	0		Available		0
5500-B Assembly Cell B				0.0%	0		Available		0
5900 Heat Treat				0.0%	0		Available		0

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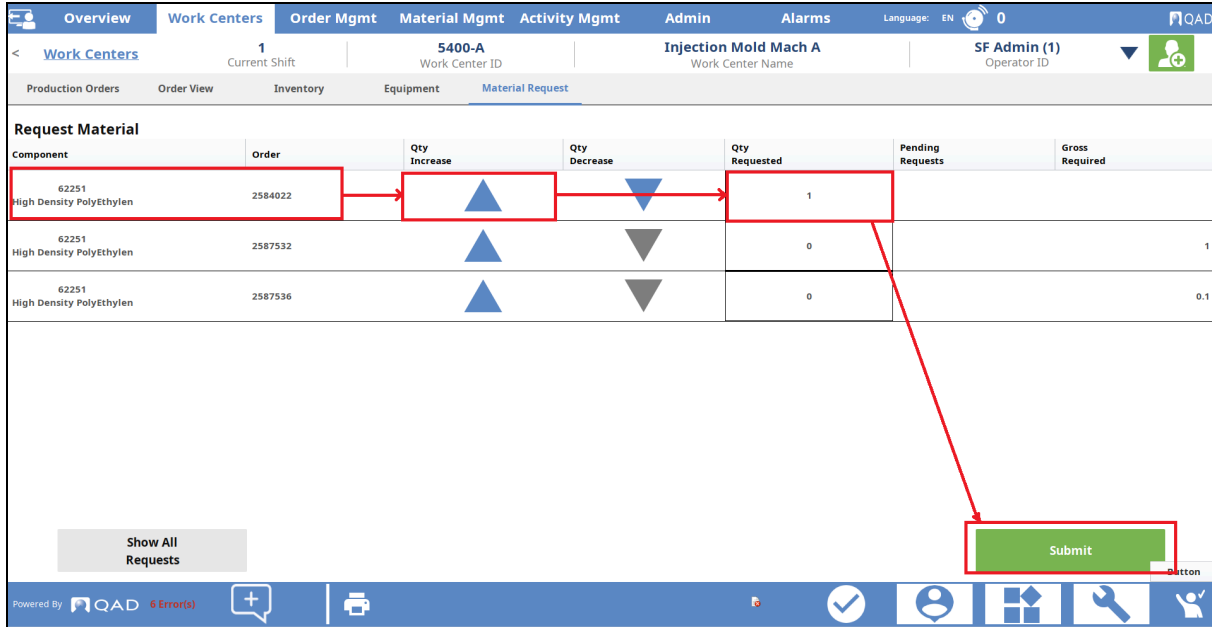
4. Navigate to the Material Request tab.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD						
< Work Centers 1 Current Shift   5400-A Work Center ID   Injection Mold Mach A Work Center Name   SF Admin (1) Operator ID															
Production Orders		Order View	Inventory	Equipment	<b>Material Request</b>										
4 Open		4 Active		1 Rework						Search for an Order ID...					
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2584021-10			50200	Production				2/19/2021	0.02%	100	50	44	4		3/1/2021
2584022-10			50100	Production				2/23/2021	0.2%	100	50	9	1		3/2/2021
2587532-10			50100	Production				3/1/2021	0.46%	100	100	89	1		3/3/2021
2587536-10			50100	Production				3/2/2021		100	10	10			

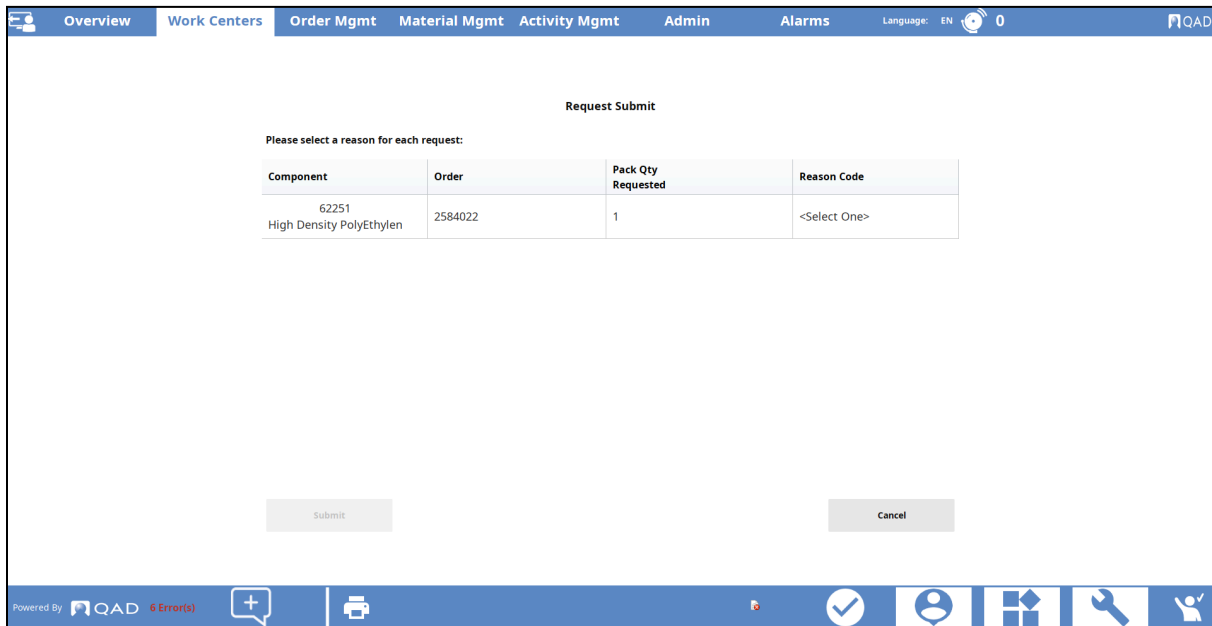
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Button

5. Request additional material for the selected component.



6. Verify that the user is prompted to enter the reason code for this action.



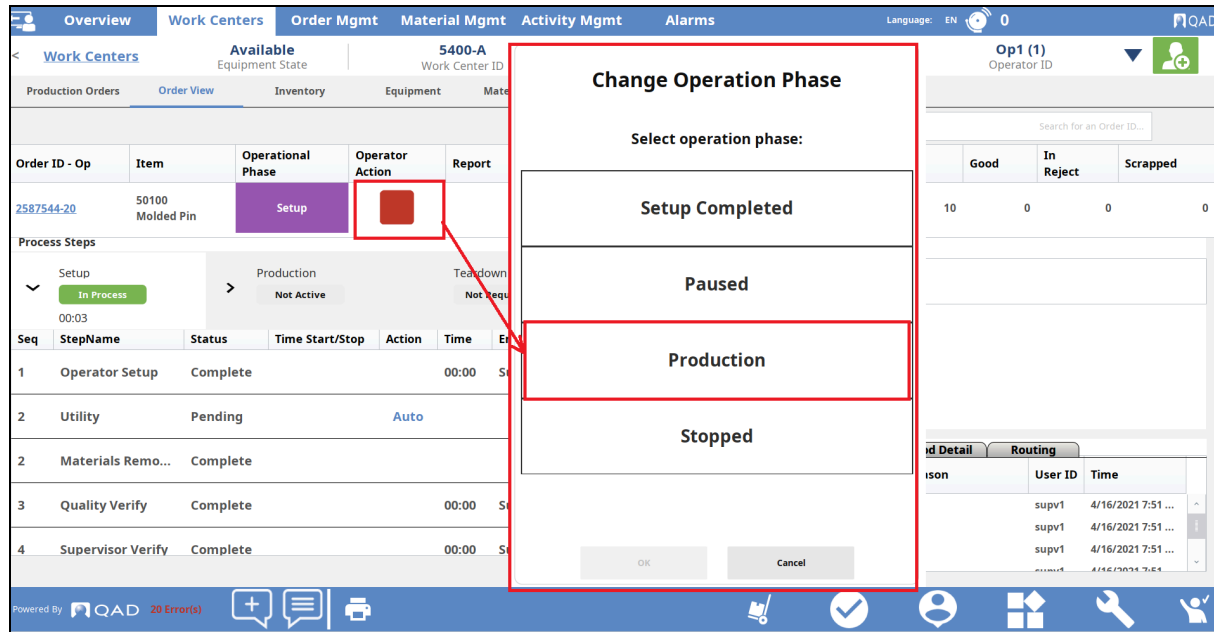
## Enable Setup Requests

### Purpose

The Enable Setup Requests production option allows the user to specify whether an automatic material request is triggered for all components on a production order when it is moved to an operation phase that has setup process steps (Setup Process Steps = Yes).

### Where

The production option is applied to the Production Orders/Order View screen, when initiating the transition of the production phase into the phase that has the setup process.



## Setting

Enter the Boolean Value for this option which determines if material requests are created when the production order is moved into the operation phase that has the setup process steps:

- If Boolean =1, the material request is automatically created.
- If Boolean = 0, the material request setup is NOT created.

## Setup

Field	Setting
Parameter ID	6
Parameter	EnableSetupRequests
Description	Uses the Boolean column to specify whether Setup Material Requests will be enabled for the specified production entity.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Enable Setup Requests option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option which determines if material requests are created when the production order is moved into the operation phase that has the setup process steps: <ul style="list-style-type: none"> <li>• <b>1.</b> Material Requests are automatically created..</li> <li>• <b>0.</b> Material Requests are NOT created.</li> </ul>

## Example

Follow these steps to transfer a production order into an operational phase that has a setup process:

1. In **Production Options** (EnableSetupRequests), enter Boolean Value = 1.
2. In Operation Phases, find an operational phase where Setup Process Steps = Yes.

Operation Phases							
Phase greater or equal to <input type="text"/> <input type="button" value="Search"/>							
Domain	Phase	SITE	Description	Show in Active	Show in Open	Show in Complete/Final Phase	Setup Process Steps
10USA	Complete	10-200		NO	NO	YES	NO
10USA	CompleteSetup	10-200		YES	YES	NO	NO
10USA	Open	10-200		NO	YES	NO	NO
10USA	PausedProduction	10-200		YES	YES	NO	NO
10USA	PausedSetup	10-200		YES	YES	NO	NO
10USA	PausedTeardown	10-200		YES	YES	NO	NO
10USA	Production	10-200		YES	YES	NO	NO
10USA	Production*	10-200	Production No Labor	YES	YES	NO	NO
10USA	Setup	10-200		YES	YES	NO	YES
10USA	StoppedEquip	10-200		NO	YES	NO	NO
10USA	StoppedProd	10-200		NO	YES	NO	NO
10USA	StoppedSetup	10-200		NO	YES	NO	NO
10USA	Teardown	10-200		YES	YES	YES	NO

3. Log into PE.
4. Log into the work center against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Alarms	Language: EN	0	QAD	
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587544 (9)	50100 Molded Pin	0.0%	51	Open	Available	Supervisor (2)	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available		0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	11	Open	Available	SFAdmin	0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available		0
5900 Heat Treat				0.0%	0		Available	Supervisor (3)	0

5. Select the production order for which the material request is to be done automatically.

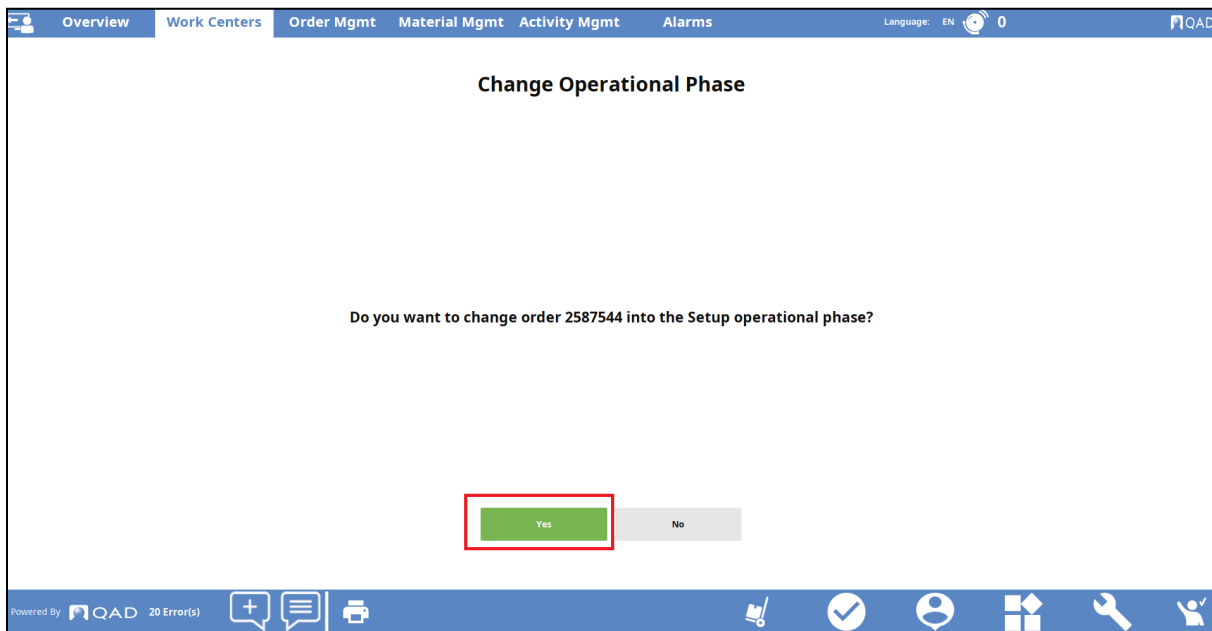
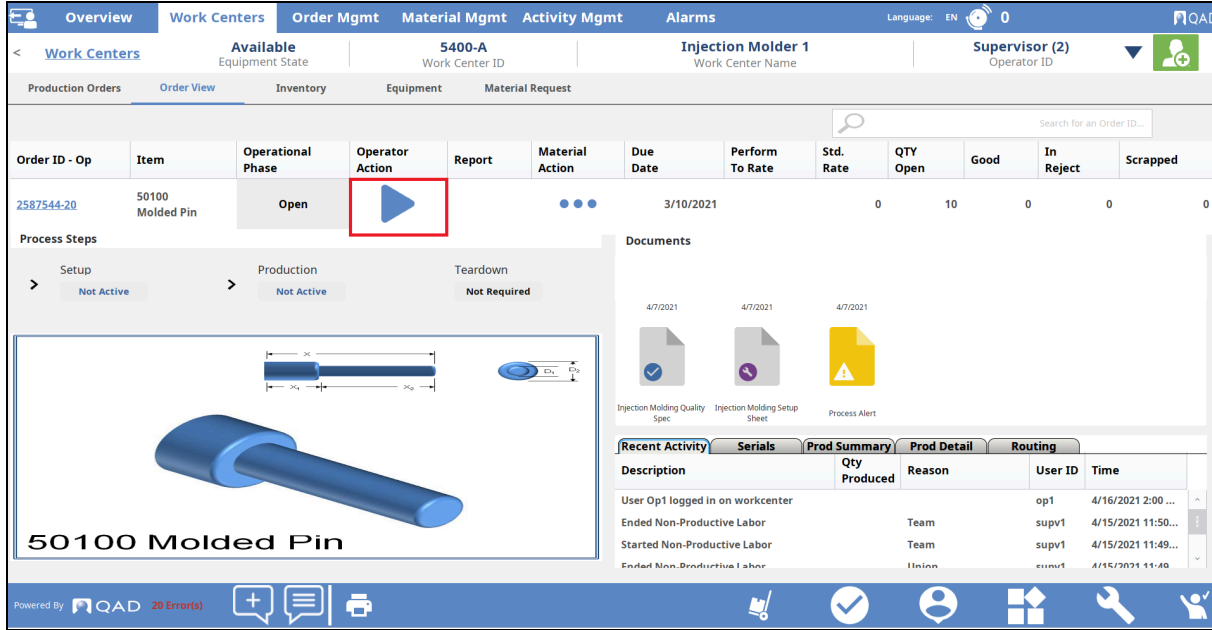
Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587544-20				50100	Open	▶		●●●	3/10/2021	3/10/2021			0	10	10		0
mgw0317a-10				50100	Open	▶		●●●	3/17/2021	3/17/2021			100	100	100		
mgw0317b-10				50100	Open	▶		●●●	3/17/2021	3/17/2021			100	100	100		
mgw0317c-10				50100	Open	▶		●●●	3/17/2021	3/17/2021			100	100	100		
mgw0317d-10				50100	Open	▶		●●●	3/17/2021	3/17/2021			100	100	100		
mgw0317e-10				50100	Open	▶		●●●	3/17/2021	3/17/2021			100	100	100		
mgw0318a-10				50100	Open	▶		●●●	3/18/2021	3/18/2021			100	100	100		
2587562-10				50100	Open	▶		●●●	3/24/2021	3/31/2021			100	10	10		
2587562-20				50100	Open	▶		●●●	3/24/2021	3/31/2021			0	10	10		0

6. Check the current status of material requests for this production order (currently does not exist).

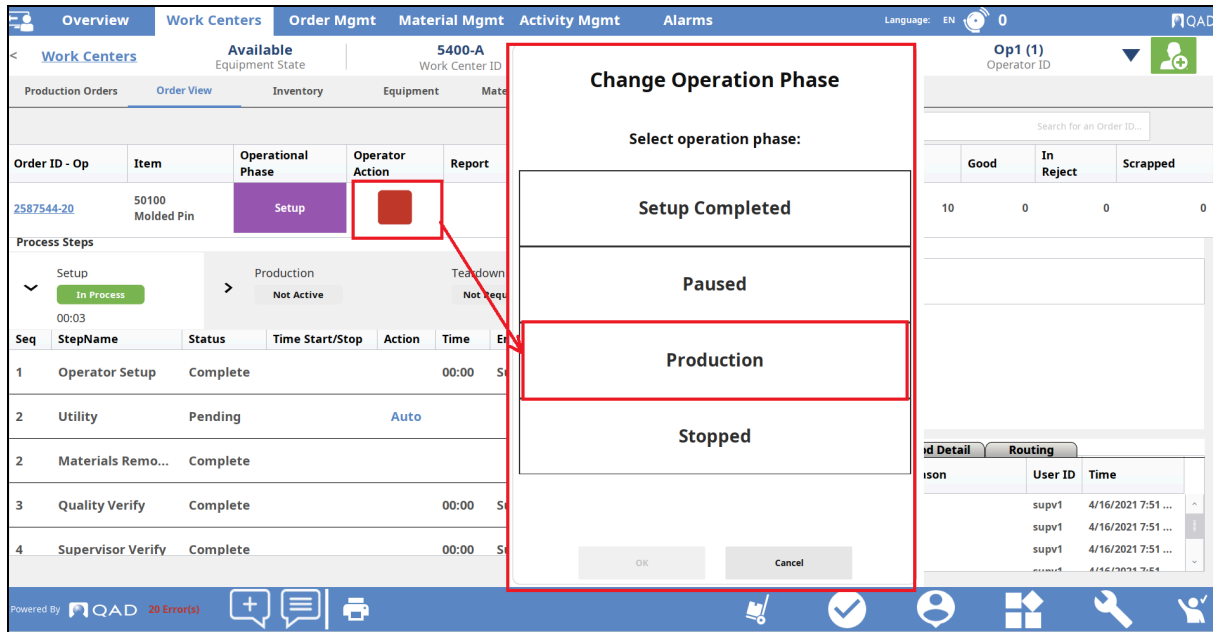
Component	Order	Qty Increase	Qty Decrease	Qty Requested	Pending Requests	Gross Required
62251 High Density PolyEthylene	2583995	▲	▼	0		
62251 High Density PolyEthylene	2587532	▲	▼	0		

Show All Requests

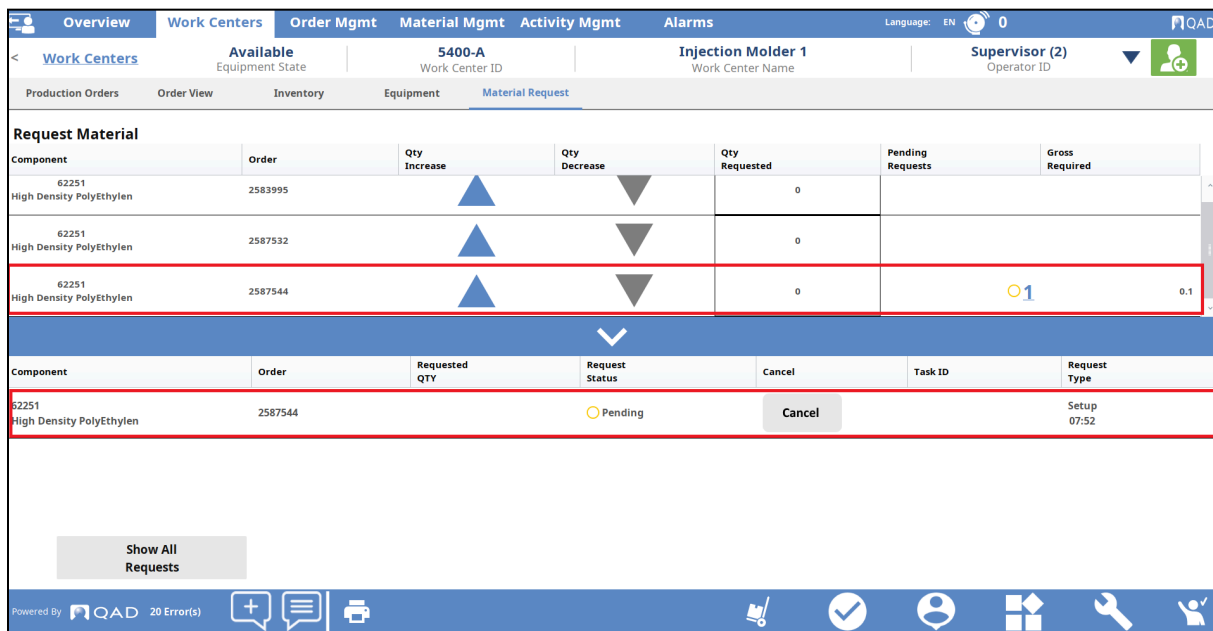
7. Navigate to the Order View for the selected production order and move it into the Setup Phase.



8. Complete all Setup Process Steps and change the production order operation state to Production.



- Verify that the material request (Request Type = Setup) was created for all the components of the item being produced.



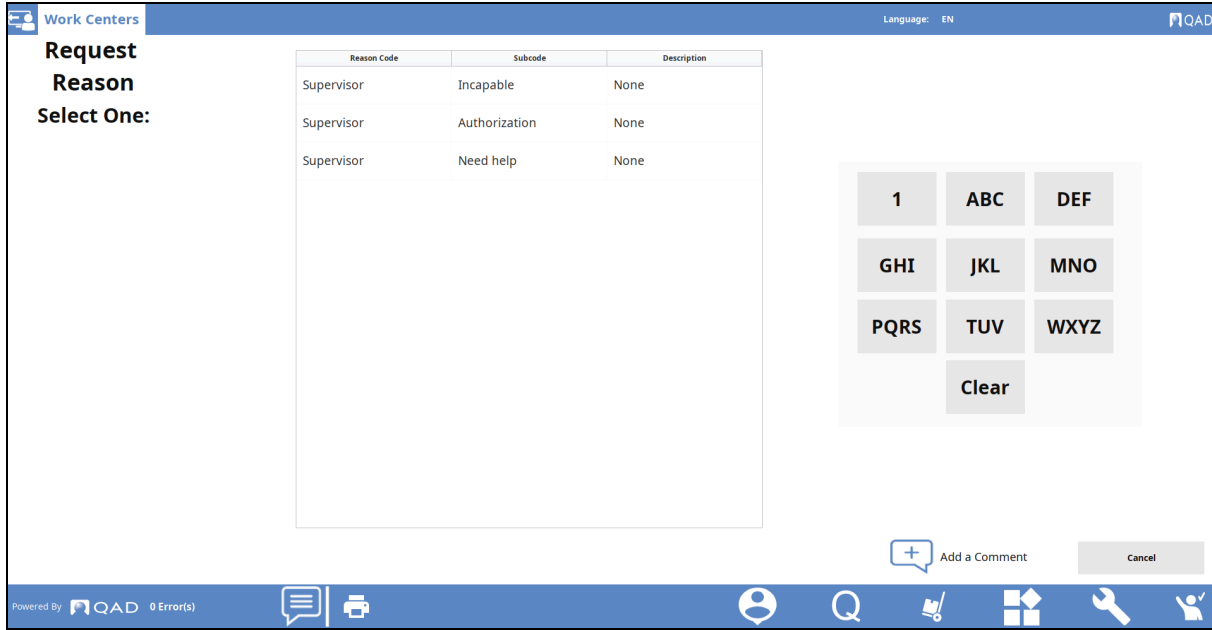
## Require Personnel Request Reasons

### Purpose

The Require Personnel Request Reasons production option allows the user to specify whether users are required to enter reason codes when making personnel requests.

### Where

The production option is applied when requesting personnel from the Request Banner in PE.



**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, the user is prompted to enter the reason code when triggering the personnel request.
- If Boolean = 0, the user is NOT prompted to enter the reason code when triggering the personnel request.

**Setup**

Field	Setting
Parameter ID	22
Parameter	Require Personnel Request Reasons
Description	Uses the Boolean column to specify whether Personnel Requests require a reason code at the specified production entity. If no option is specified, reasons will not be required.
Boolean Title	Enter instruction about the setup of the boolean number value field for this production option. The Boolean value is critical for the Require Personnel Request Reasons Option, therefore entering the instructions would be useful.
Boolean Value	Set the control factor defining whether you would like that reason code screen will be prompted when the user triggers the personnel request in Production Execution. <ul style="list-style-type: none"> <li>• <b>1.</b> User will be prompted to enter the reason code if triggering the personnel request.</li> <li>• <b>0.</b> Users will NOT be prompted to enter the reason code if triggering the personnel request.</li> </ul>

**Example**

Follow these steps to request personnel at a specified work center:

1. In **Production Options** (Require Personnel Request Reasons), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Mold Mach A	3	2584021 (4)	50200 Large Bushing	12.0%	4	Production	Available	SF Admin	0
5400-C Injection Mold Mach C				0.0%	0		Available		0
5500-B Assembly Cell B				0.0%	0		Available		0
5900 Heat Treat				0.0%	0		Available		0

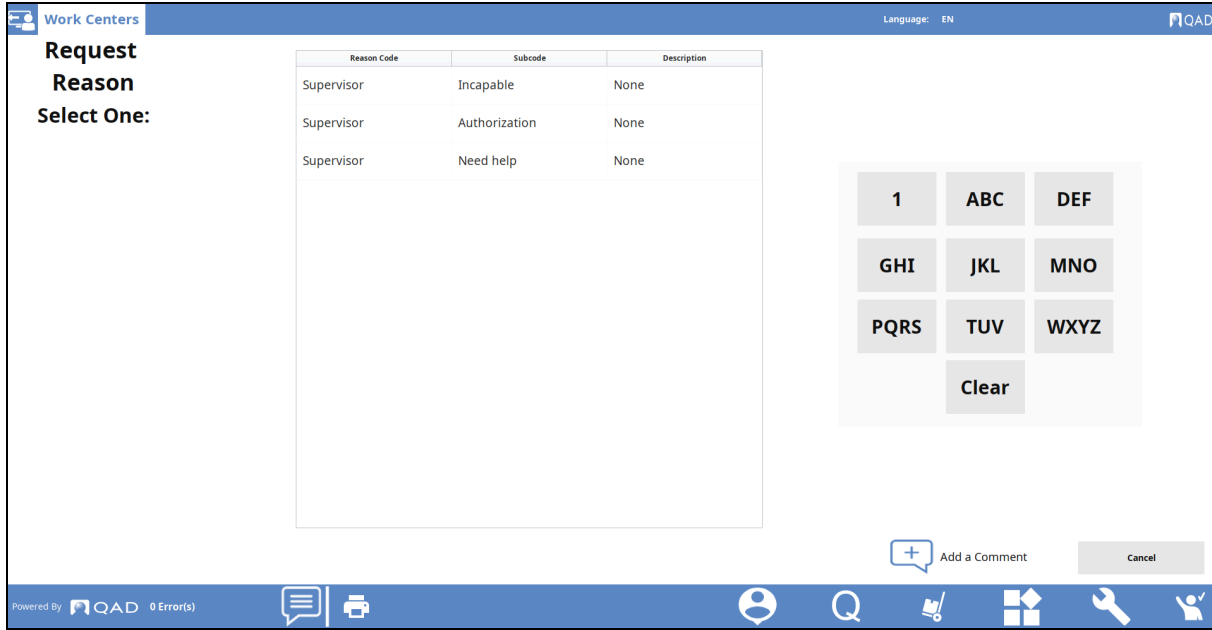
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4. Request personnel at the work center.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2584021-10			50200	Production				2/19/2021	0.02%	100	50	44	4		3/1/2021
2584022-10			50100	Production				2/23/2021	0.2%	100	50	9	1		3/2/2021
2587532-10			50100	Production				3/1/2021	0.46%	100	100	89	1		3/3/2021
2587536-10			50100	Production				3/2/2021		100	10	10			

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5. Verify that the user is prompted to enter the reason code for this action.



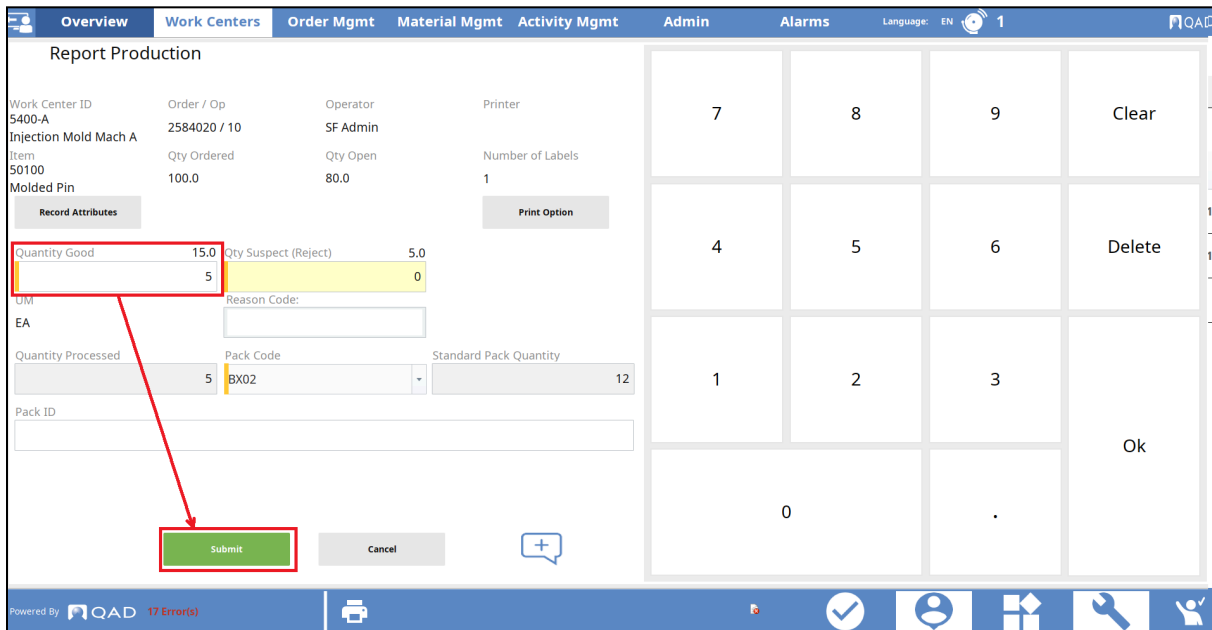
## Auto Removal Request

### Purpose

The Auto Removal Request production option allows the user to specify whether any request activated from the Request Banner is automatically removed at the specified work center when the operator reports the production on its last operation.

### Where

The production option is applied to any request at the Request Banner in PE.



### Setting

Enter the Boolean Value for this option to decide if any request activated at the work center is to be

automatically removed when production is reported on its last operation:

- If Boolean =1, all active requests become inactive when the operator reports production on its last operation.
- If Boolean = 0, none of the requests are deactivated when the operator reports production on its last operation. This is the default setting.

### Setup

Field	Setting
Parameter ID	26
Parameter	AutoRemovalRequest
Description	Uses the Boolean column to specify whether Removal Requests are generated automatically after reporting production on last op. False by default.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Auto Removal Request Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• <b>1.</b> All active requests become inactive when the operator reports production on its last operation.</li> <li>• <b>0.</b> None of the requests are deactivated when the operator reports production on its last operation. This is the default setting.</li> </ul>

### Example

Follow these steps to activate any kind of the request from the Request Banner before reporting production and then later report the production against its last operation:

1. In **Production Options** (AutoRemovalRequest), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Mold Mach A	2	1434 (3)	311 BALLMILLED STAB P/N 141	10.0%	3	Production	Available	SF Admin (2)	13
5400-B Injection Mold Mach B				0.0%	0		Available	Chris Brown (QAD) (3)	1
5400-C Injection Mold Mach C				0.0%	0		Down	Chris Brown (QAD) (2)	0
5500-A Assembly Cell A				0.0%	0		Available	Chris Brown (QAD) (3)	0
5500-B Assembly Cell B				0.0%	0		Available	Chris Brown (QAD)	0
5900 Heat Treat				0.0%	0		Available	SF Admin (2)	0

- Select and activate the request from the Request Banner; for example, a supervisor and maintenance request.

3 Open			3 Active			1 Rework			Search for an Order ID...						
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
1434-10			311	Production				2/1/2021	2.03%	25	100	90	10		2/19/2021
2584020-10			50100	Production				2/19/2021	0.12%	100	100	80	5		2/23/2021
2584021-10			50200	Production				2/19/2021	0%	100	50	50			

- Report production on the last operation and then verify that the active requests automatically became inactive at the request banner.

3 Open			3 Active			1 Rework			Search for an Order ID...						
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
1434-10			311	Production				2/1/2021	2.03%	25	100	90	10		2/19/2021
2584020-10	●		50100	Production				2/19/2021	0.12%	100	100	80	5		2/23/2021
2584021-10			50200	Production				2/19/2021	0%	100	50	50			

Report Production			
Work Center ID 5400-A	Order / Op 2584020 / 10	Operator SF Admin	Printer 7
Injection Mold Mach A	Qty Ordered 100.0	Qty Open 80.0	Number of Labels 1
Item 50100	Molded Pin	Record Attributes	Print Option
Quantity Good 15.0	Qty Suspect (Reject) 5.0		
UM EA	Reason Code:		
Quantity Processed 5	Pack Code BX02	Standard Pack Quantity 12	
Pack ID			
Submit		Cancel	

## Prompt for Replenishment

### Purpose

The Prompt for Replenishment production option allows the user to specify whether the user is prompted to replenish materials when their components run low after production reporting.

### Where

The production option is applied after reporting production in the Report Production screen and the users are prompted with the Material Request screen.

### Setting

Enter the Boolean Value for this option:

- If Boolean =1, then the user is prompted to replenish the components that are running low at the work center after reporting the production.
- If Boolean = 0, then the user is NOT prompted to replenish the components that are running low at the work center after reporting the production.

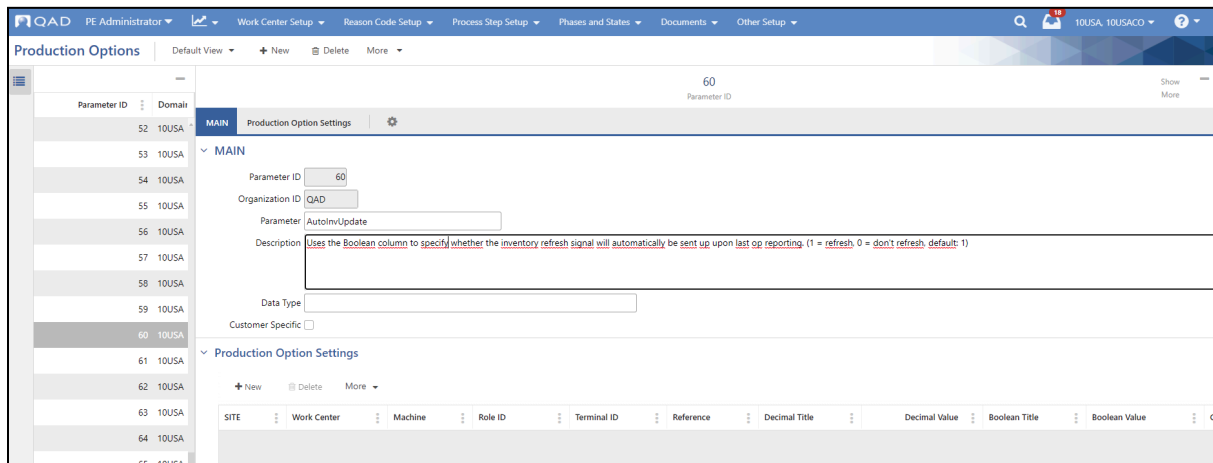
**Setup**

Field	Setting
Parameter ID	43
Parameter	PromptForReplenishment
Description	Uses the Boolean column to specify whether the user will be prompted for replenishment when their components run low after production reporting.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Prompt For Replenishment Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• <b>1.</b> The user is prompted to replenish the components that are running low at the work center after reporting the production.</li> <li>• <b>0.</b> The user is NOT prompted to replenish the components that are running low at the work center after reporting the production.</li> </ul>

**Auto Inv Update**

**Purpose**

The Auto Inv Update production option allows the user to specify whether the inventory refresh signal is automatically sent when reporting production at the last operation.



**Setting**

Enter the Boolean Value for this option:

- If Boolean =1, then the inventory refreshment is automatically sent when reporting production at the last operation. This is the default setting.

- If Boolean = 0, then the inventory is not updated when reporting production at the last operation.

## Setup

Field	Setting
Parameter ID	60
Parameter	AutoInvUpdate
Description	Uses the Boolean column to specify whether the inventory refresh signal will automatically be sent up upon last op reporting. (1 = refresh, 0 = don't refresh, default: 1)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Auto Inv Update Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option: <ul style="list-style-type: none"> <li>• <b>1.</b> Inventory refreshment is automatically sent when reporting production at the last operation. This is the default setting.</li> <li>• <b>0.</b> Inventory is not updated when reporting production at the last operation.</li> </ul>

## Roles Categories

The following production options are related to user roles.

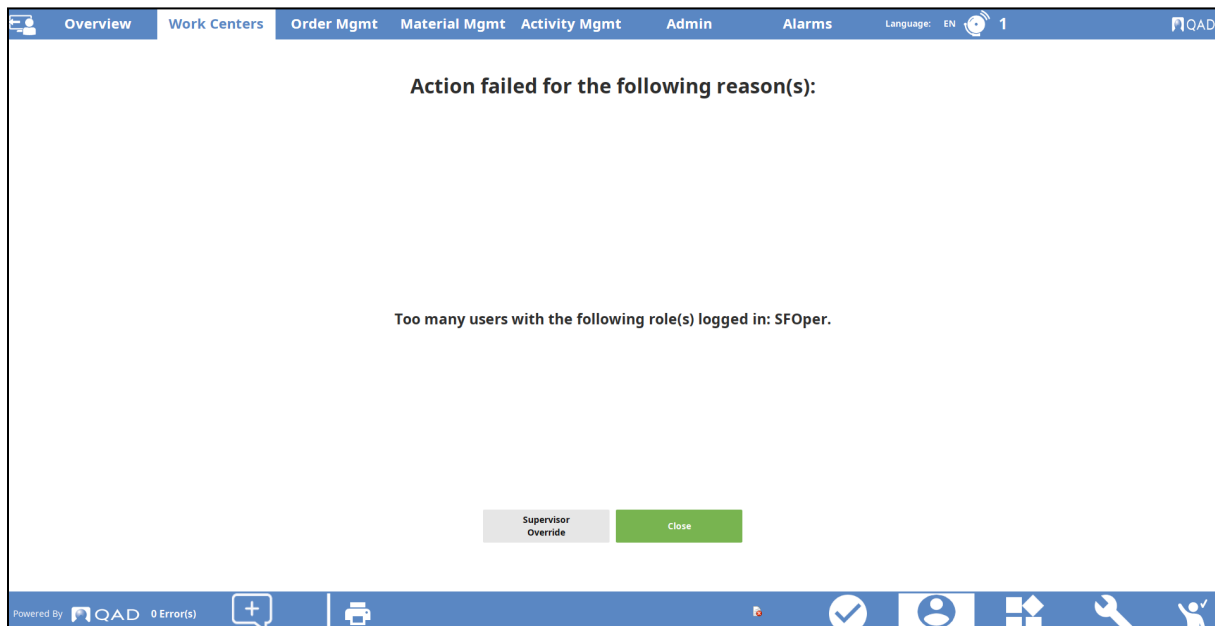
### Max Users by Role

#### Purpose

The Max Users by Role production option allows the user to specify the number of users with the same role that can be logged in at the specified work center at the same time.

#### Where

The production option is applied to the PE log in screen.



## Setting

Enter the Role ID and Integer Value which specify how many users with the same user role can be logged into the specified work center at the same time:

- **Role ID.** Specifies the PE user role associated with this login restriction.
- **Integer Value.** Specifies the maximum number of users with the same Role ID that can be logged into the work center at the same time. For example, if Integer Value = 2 and Role ID = 11 (Shop Floor Operator), then a maximum of two shop floor operators can log into the specified work center at the same time.

## Setup

Field	Setting
Parameter ID	1
Parameter	MaxUsersbyRole
Description	Uses the RoleID column to specify the number of users with that role logged in at the specified production entity. Will not allow the user to log in if there are as many users as specified in the Integer column.
Role ID (KEY)	Enter the Role ID against which the production option is to be applied for, such as shop floor supervisor or shop floor operator.
Integer Title	Enter the setup details associated with the Integer Value. For Max Users by Role Option the integer value is critical, therefore entering instruction can be useful.
Integer Value	Enter the integer number to set up the maximum number of users allowed to be logged in at the specified work center. <ul style="list-style-type: none"> <li>● 1. Only 1 user can be logged in the specified work center at the same time.</li> <li>● 2. Only 2 users maximum can be logged in the specified work center at the same time.</li> <li>● 3. Only 3 users maximum can be logged in the specified work center at the same time.</li> <li>● 4. Only 4 users maximum (<i>and so on</i>).</li> </ul>

## Example

Follow these steps to log into the work center and verify that the login restrictions function properly:

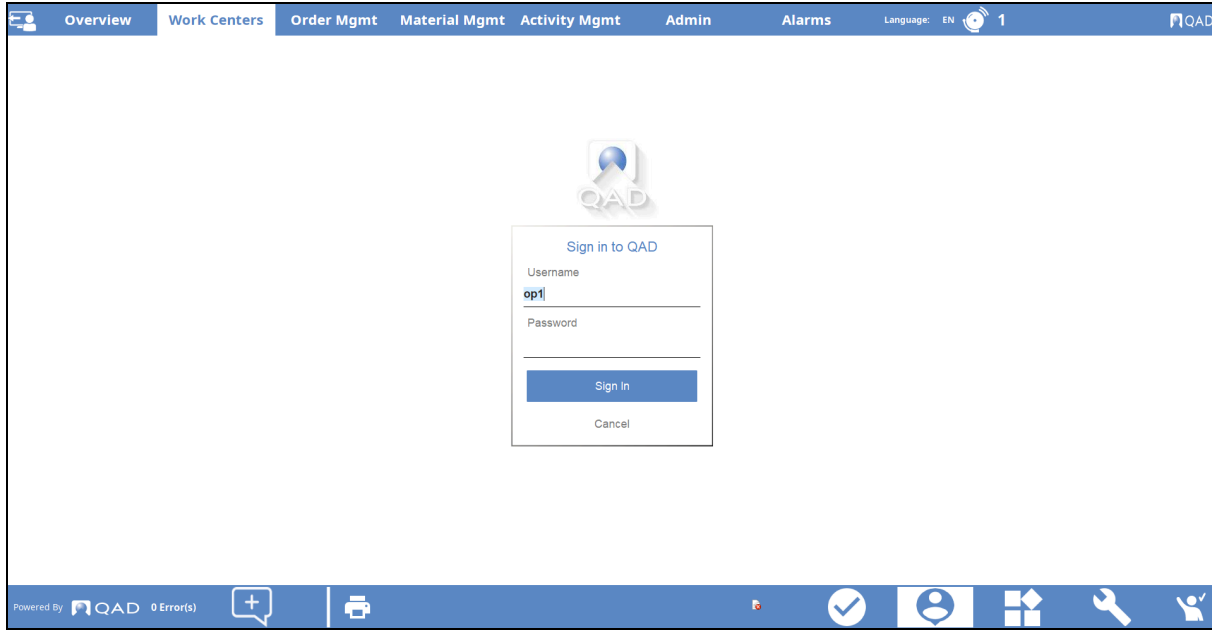
1. In **Production Options** (MaxUsersbyRole), enter the following Role ID and Integer Value:
  - Role ID = 33 (Shop Floor Operator)
  - Integer Value = 1
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1	1	2583995	50100 Molded Pin	1270.0%	11	Open	Available	SFAdmin	0
5400-B Injection Molder 2		2587540	50100 Molded Pin	0.0%	4	Open	Available	SFAdmin	0
5400-C Injection Molder 3				0.0%	0		Available		0
5500-A Assembly Cell 1	5	2584016 (3)	00100 Pin Assembly - Star	0.0%	8	Open	Down	Supervisor	0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	0.0%	3	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

4. Log in as the operator.

The screenshot shows the 'Work Centers' page for '5400-A Work Center'. A 'User Actions' dialog box is open, prompting the user to 'Select one:' from two options: 'Log Into Work Center' and 'Report Non-productive Time'. A red arrow points from the user icon in the top right corner of the application to the 'User Actions' dialog box.

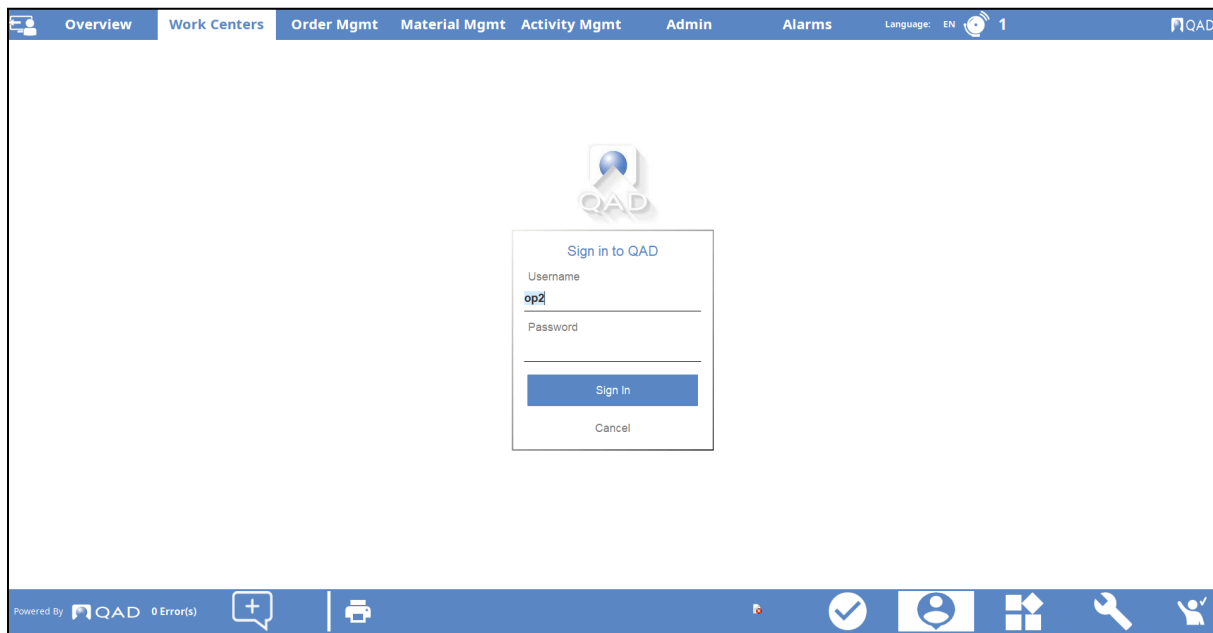
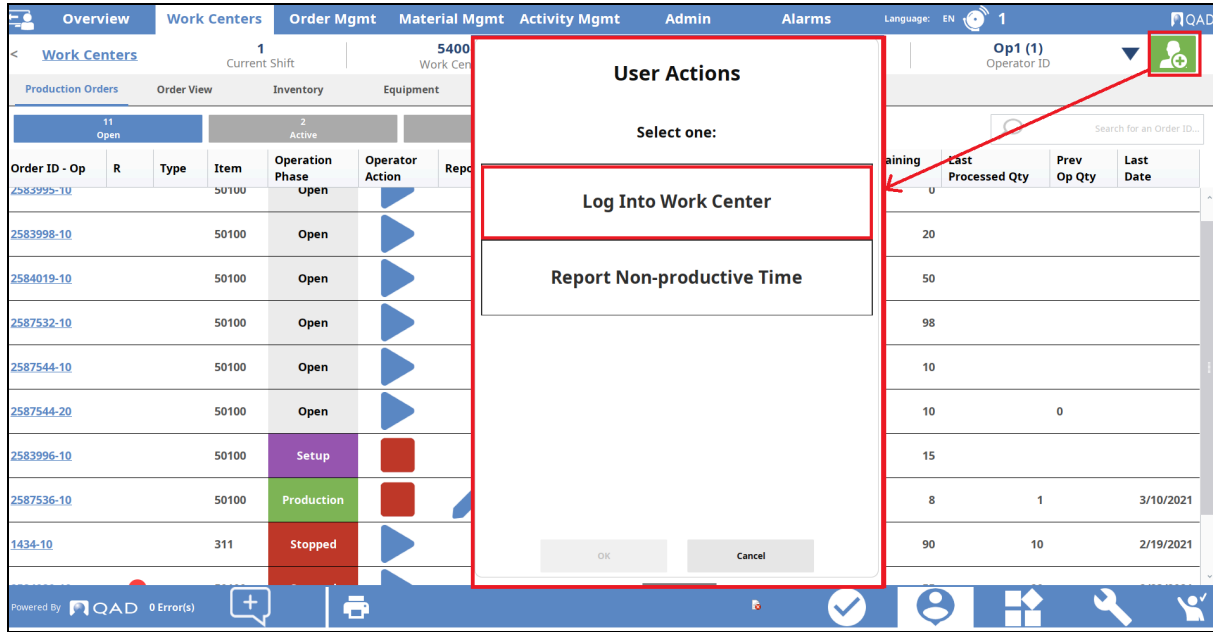
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report
2583995-10			50100	Open	▶	
2583998-10			50100	Open	▶	
2584019-10			50100	Open	▶	
2587532-10			50100	Open	▶	
2587544-10			50100	Open	▶	
2587544-20			50100	Open	▶	
2583996-10			50100	Setup	■	
2587536-10			50100	Production	■	
1434-10			311	Stopped	▶	



5. Verify that the first operator is logged in at the work center.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583995-10			50100	Open			●●●	10/11/2020		100	10	0			
2583998-10			50100	Open			●●●	11/5/2020		100	20	20			
2584019-10			50100	Open			●●●	2/18/2021		100	50	50			
2587532-10			50100	Open			●●●	3/1/2021		100	100	98			
2587544-10			50100	Open			●●●	3/10/2021		100	10	10			
2587544-20			50100	Open			●●●	3/10/2021	0		10	10	0		
2583996-10			50100	Setup			●●●	10/9/2020		100	15	15			
2587536-10			50100	Production			●●●	3/2/2021	0.01%	100	10	8	1		3/10/2021
1434-10			311	Stopped			●●●	2/1/2021	0.48%	25	100	90	10		2/19/2021

6. Log in as the second operator.



7. Verify the system does not allow the second user to log in as the next operator and that a failure message is displayed.



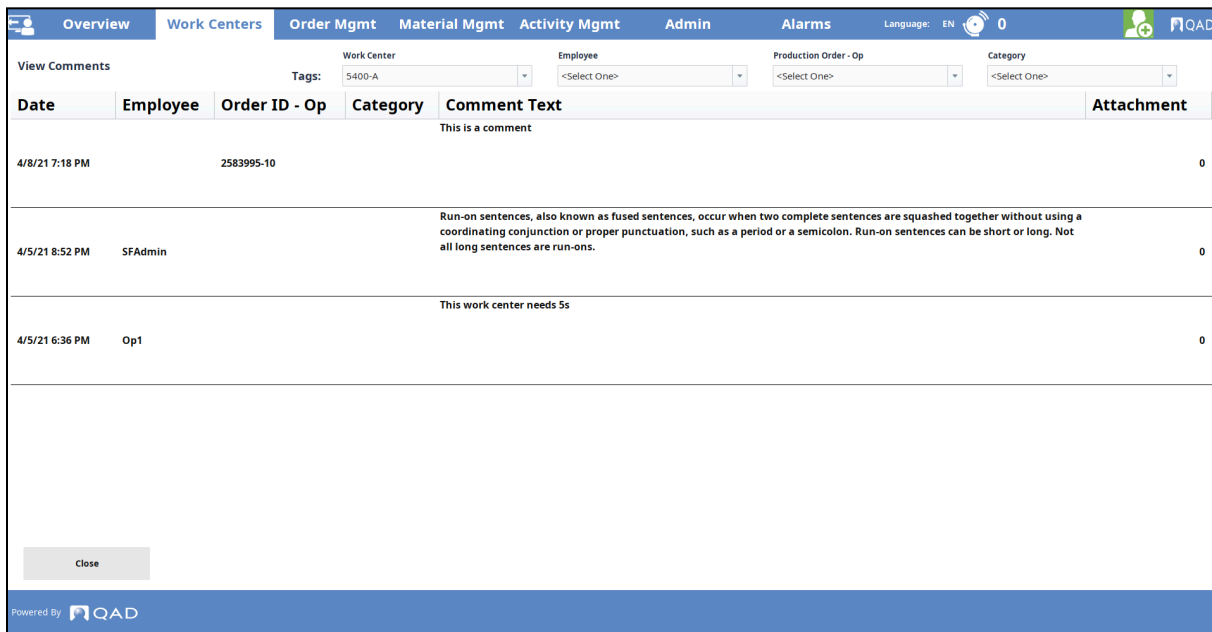
## Role Can View Comments

### Purpose

The Role Can View Comments production option allows the user to specify if a certain role can view comments from the Work Center kiosk view.

### Where

The production option is applied to the Work Center kiosk, when navigating to the comments section and opening the comments view.



### Setting

Enter the Role ID and Boolean Value for this option:

- **Role ID.** Specifies the PE user role that can or cannot view the comments.
- **Boolean Value.** Specifies if the user with a specified role can view the comments list from the Work Center kiosk view. The following options are available:
  - If Boolean =1, all users with the specified role can view the comments.
  - If Boolean = 0, users with the specified role can NOT view comments.

## Setup

Field	Setting
Parameter ID	27
Parameter	RoleCanViewComments
Description	Uses the Boolean column to specify whether a specific Role ID can view comments from the Work Center Kiosk. True allows the role to view comments, false or no match does not.
Role ID (KEY)	Enter the Role ID for which the comments view will be available.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Role Can View Comments Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value that specifies if the user with a specified role can view the comments list from the Work Center kiosk view. The following options are available: <ul style="list-style-type: none"> <li>● <b>1.</b> All users with the specified role can view the comments.</li> <li>● <b>0.</b> Users with the specified role can NOT view comments.</li> </ul>

## Example

Follow these steps to view the “Comments” section at the Work Center kiosk view:

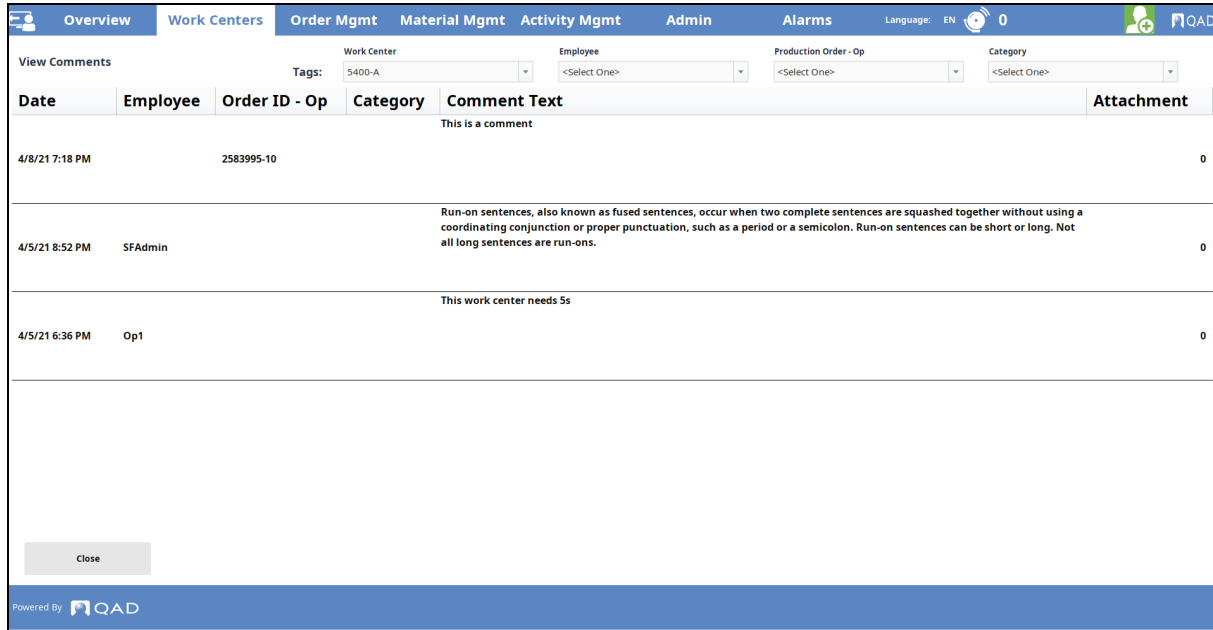
1. In **Production Options** (RoleCanViewComments), enter the following Role ID and Boolean Value:
  - Role ID = 11 (Shop Floor Operator)
  - Boolean Value = 1
2. Log into PE.
3. Log into the Site against which you applied the setting.

Overview		Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD	
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments		
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.86363636363636%	5	Production	Available			0	
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.18181818181818%	5	Open	Available			0	
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.4545454545454545%	5	Open	Available			0	
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available			0	
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.589%	40	Production	Available	Op2 - Blue (2)		0	
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available			0	
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available			0	
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available			0	
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available			0	
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.29666666666667%	3		Available			0	
5500-A Assembly Cell A	2			0.0%	0		Available			0	
5500-B		2502531	00100	12.08000000000000%	2	Open	Available			0	

4. Navigate to the Comments section by selecting one of the Comments fields.

Overview		Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD	
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments		
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.86363636363636%	5	Production	Available			0	
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.18181818181818%	5	Open	Available			0	
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.4545454545454545%	5	Open	Available			0	
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available			0	
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.589%	40	Production	Available	Op2 - Blue (2)		0	
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available			0	
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available			0	
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available			0	
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available			0	
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.29666666666667%	3		Available			0	
5500-A Assembly Cell A	2			0.0%	0		Available			0	
5500-B		2502531	00100	12.08000000000000%	2	Open	Available			0	

5. Verify that the Comments View is available, as shown below.



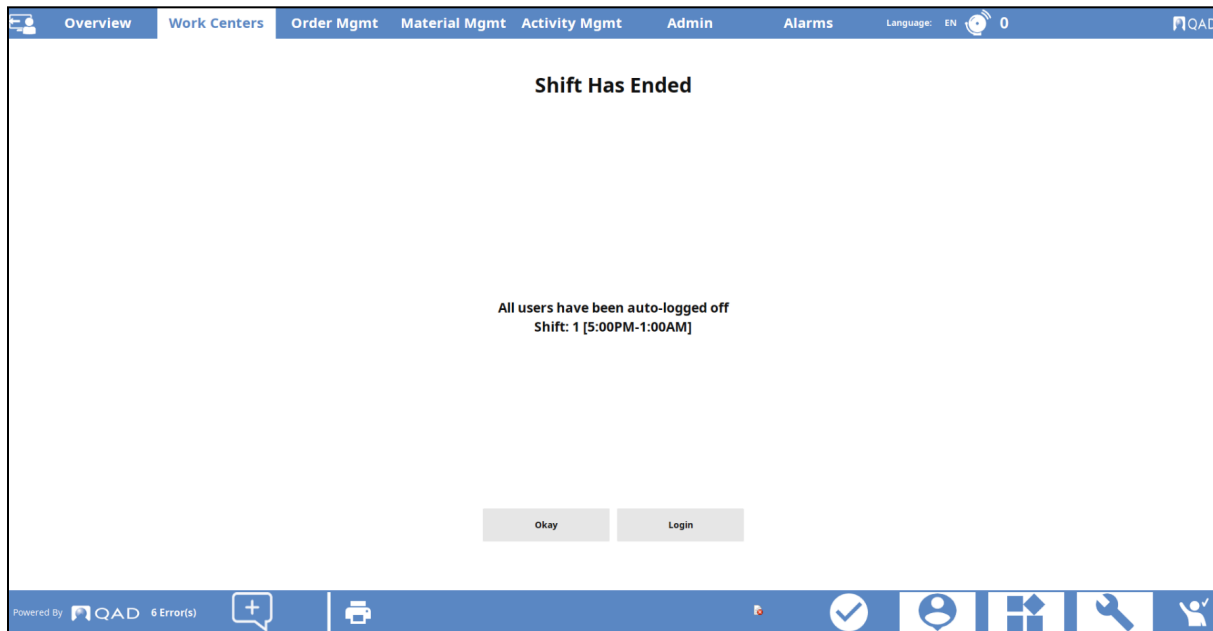
## Roles for Auto Logout

### Purpose

The Roles for Auto Logout production option allows the user to specify if a user with a certain role is automatically logged out after a shift change for the specified work center.

### Where

The production option is applied to any screen when the user is logged in. The user is prompted automatically with information about being logged off due to the shift change.



### Setting

Enter the Role ID and Boolean Value for this option:

- **Role ID.** Specifies the PE user role that is logged out of PE when the shift change occurs.
- **Boolean Value.** Specifies if the user with the specified Role ID is automatically logged off after a shift change:
  - If Boolean =1, the users with the specified Role ID are automatically logged out of PE. This is the default setting.
  - If Boolean = 0, the users with the specified Role ID are not logged out of PE.

## Setup

Field	Setting
Parameter ID	28
Parameter	RolesforAutoLogout
Description	Uses the Boolean column to specify whether the RoleID in the Int column will be auto logged off at shift change for the specified production entity. 1 = auto logoff, if nothing is set up default is 1.
Role ID (KEY)	Enter the Role ID that is logged out of PE when the shift change occurs.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Roles for Auto Logout Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value that specifies if the user with the specified Role ID is automatically logged off after a shift change: <ul style="list-style-type: none"> <li>● <b>1.</b> The users with the specified Role ID are automatically logged out of PE. This is the default setting.</li> <li>● <b>0.</b> The users with the specified Role ID are not logged out of PE.</li> </ul>

## Example

Follow these steps to verify that the user with specified role is automatically logged off from the work center after the shift change:

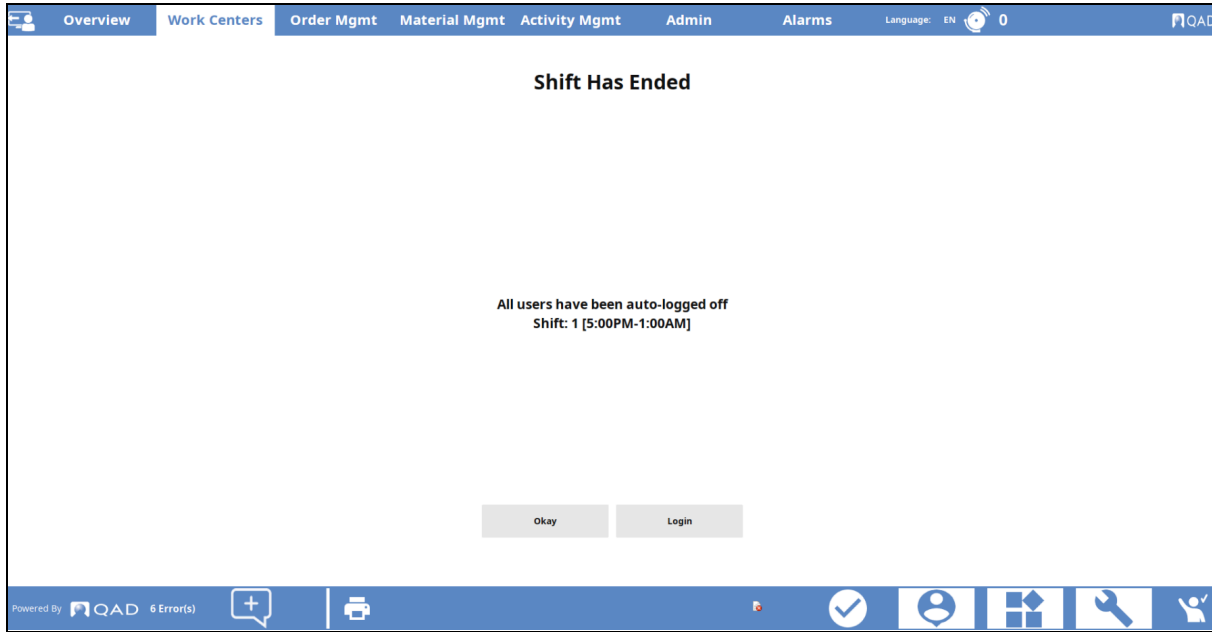
1. In **Production Options** (RolesforAutoLogout), enter the following Role ID and Boolean Value:
  - Role ID = 33 (Shop Floor Operator)
  - Boolean Value = 1
2. Log into PE.
3. Log into the site against which you applied the setting.

Overview		Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD	
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments		
5400-A Injection Mold Mach A		2584021 (4)	50200 Large Bushing	12.0%		4 Production	Available			0	
5400-C Injection Mold Mach C				0.0%		0	Available			0	
5500-B Assembly Cell B				0.0%		0	Available			0	
5900 Heat Treat				0.0%		0	Available			0	

4. Check the time when the shift ends.

SHIFT_CALENDAR														
Default View More														
Work Center = "5400" Search														
Work Center #1	Day of Week	Machine	Start 1	Start 2	Start 3	Start 4	Hours 1	Hours 2	Hours 3	Hours 4	END_1	END_2	END_3	END_4
5400	2	A	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	3	A	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	4	A	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	5	A	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	6	A	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	2	B	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	3	B	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	4	B	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	5	B	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	6	B	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	2	C	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	3	C	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00
5400	4	C	08:00	00:00	00:00	00:00	8.0	0.0	0.0	0.0	0.0 16:00	00:00	00:00	00:00

5. Verify if the system logs out all the users from the work center when the setup shift ends. The system displays information about the end of the shift and the users that are logged out.



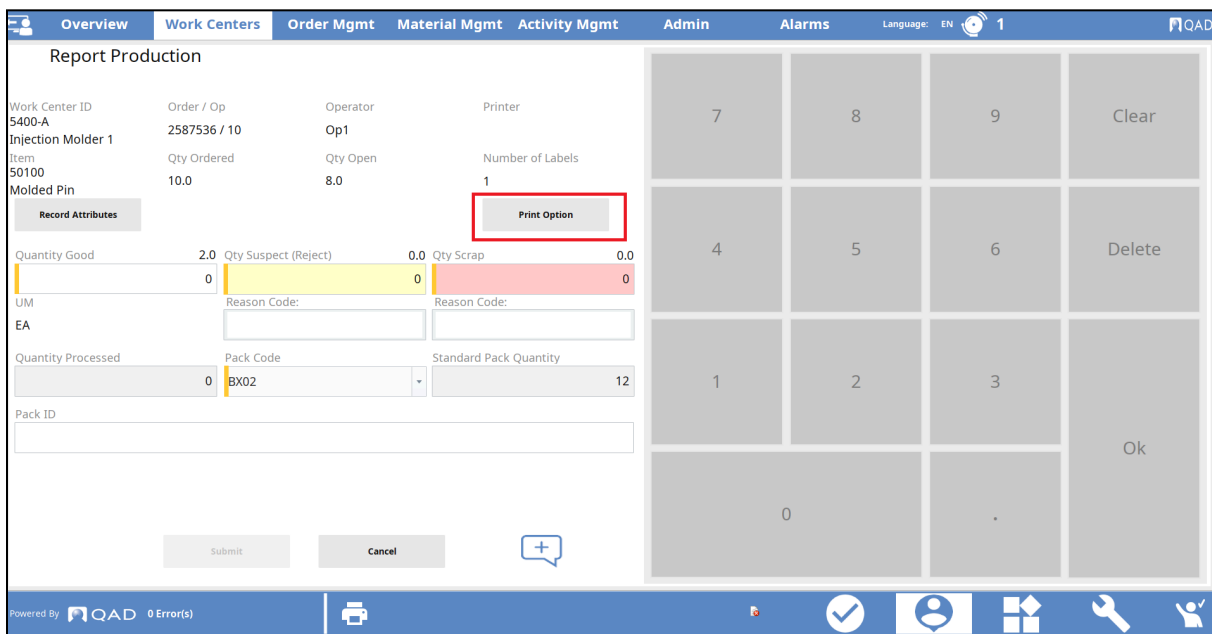
## Show Production Report Buttons

### Purpose

The Show Production Report Buttons production option allows the user to specify if a user with a certain role is able to view all buttons on the Report Production screen. This includes the ability to change the printer and number of labels for the production report.

### Where

The production option is applied to the Production Report screen.



### Setting

Enter the Role ID and Boolean Value for this option:

- **Role ID.** Specifies the PE user role for which the extra report production options are enabled/disabled.
- **Boolean Value.** Specifies if users with specified Role ID have access to the extra production report screen options. The following options are available:
  - If Boolean =1, then the users with the specified Role ID are able to change the printer and the number of labels.
  - If Boolean = 0, then the users with the specified Role ID will only have access to the default print values.

## Setup

Field	Setting
Parameter ID	44
Parameter	ShowProductionReportButtons
Description	Uses the Boolean column to specify whether the role will be able to change the printer and number of labels for a production report. If false, the role will only be able to use the default values.
Role ID (KEY)	Enter the Role ID for which the extra report production options are enabled/disabled.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Show Production Report Buttons Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value that specifies if users with specified Role ID have access to the extra production report screen options. The following options are available: <ul style="list-style-type: none"> <li>● <b>1.</b> The users with the specified Role ID are able to change the printer and the number of labels.</li> <li>● <b>0.</b> The users with the specified Role ID will only have access to the default print values.</li> </ul>

## Example

Follow these steps to report production and verify if the extra report production options are available:

1. In **Production Options** (ShowProductionReportButtons), enter the following Role ID and Boolean Value:
  - Role ID = 11 (Shop Floor Operator)
  - Boolean Value = 1
2. Log into PE.
3. Log into the site against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	1	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1	1	2583995	50100 Molded Pin	1270.0%	11	Open	Available	SFAdmin	0
5400-B Injection Molder 2		2587540	50100 Molded Pin	0.0%	4	Open	Available	SFAdmin	0
5400-C Injection Molder 3				0.0%	0		Available		0
5500-A Assembly Cell 1	5	2584016 (3)	00100 Pin Assembly - Star	0.0%	8	Open	Down	Supervisor	0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	0.0%	3	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

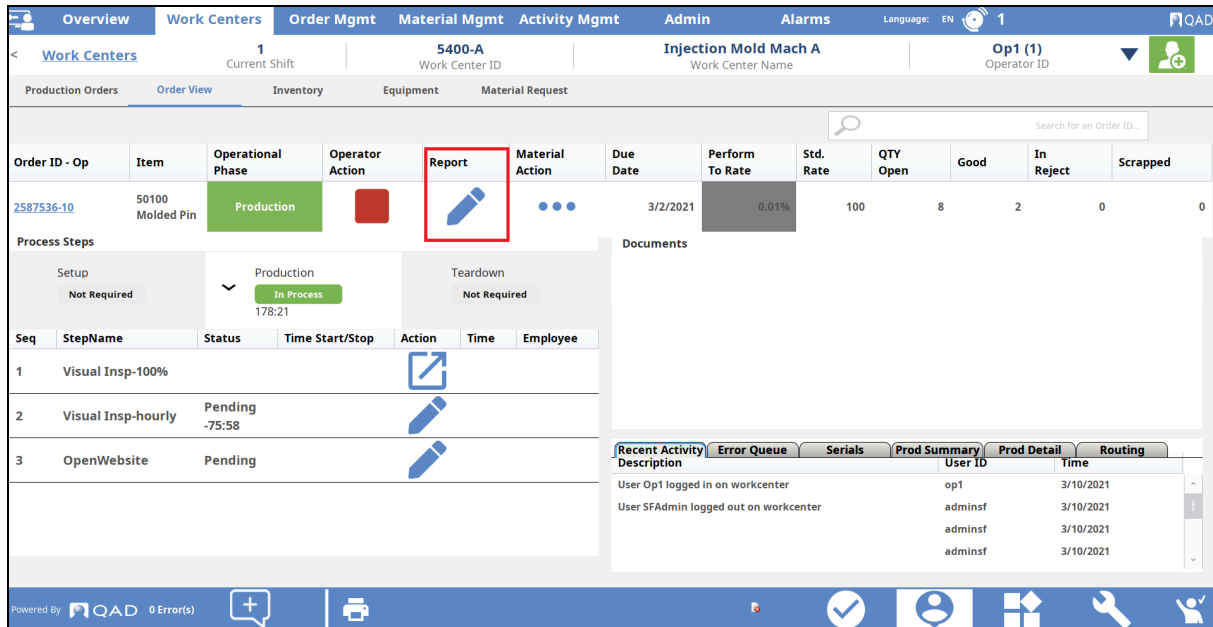
Powered By QAD

4. Select the production order you would like to report against.

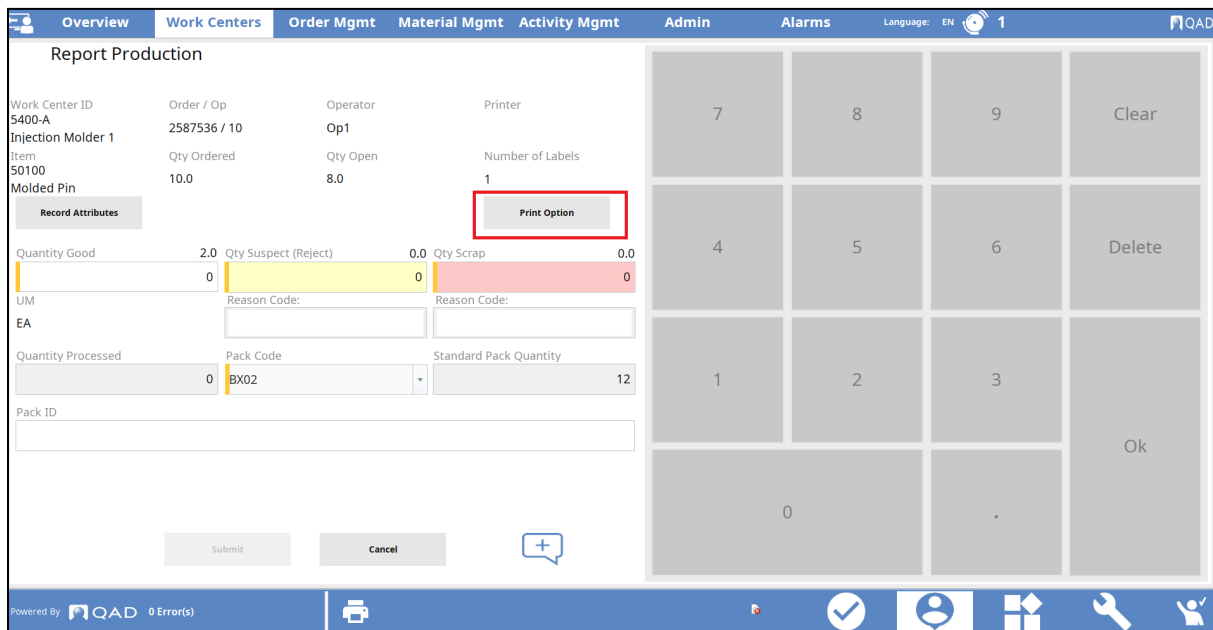
Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	1	QAD						
Work Centers		1 Current Shift	5400-A Work Center ID	Injection Mold Mach A Work Center Name		Op1 (1) Operator ID									
Production Orders		Order View	Inventory	Equipment	Material Request										
11 Open		2 Active		2 Rework						Search for an Order ID...					
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583996-10			50100	Setup			●●●	10/9/2020		100	15	15			
2587536-10			50100	Production			●●●	3/2/2021	0.01%	100	10	8	1		3/10/2021

Powered By QAD 0 Error(s)

5. Navigate to the Order View screen and report production against the production order.



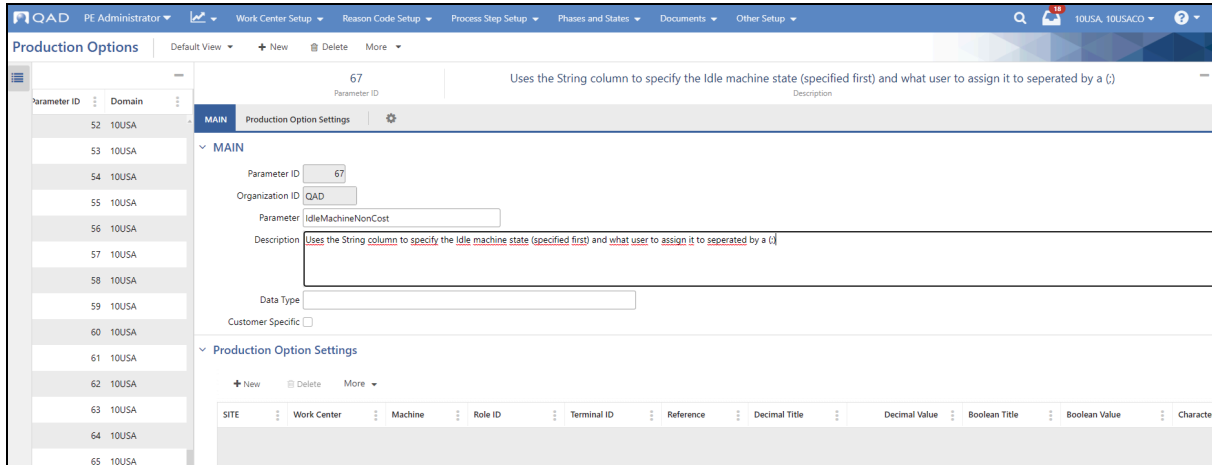
6. Verify that the user has access to Print Options when reporting production.



## Idle Machine Non Cost

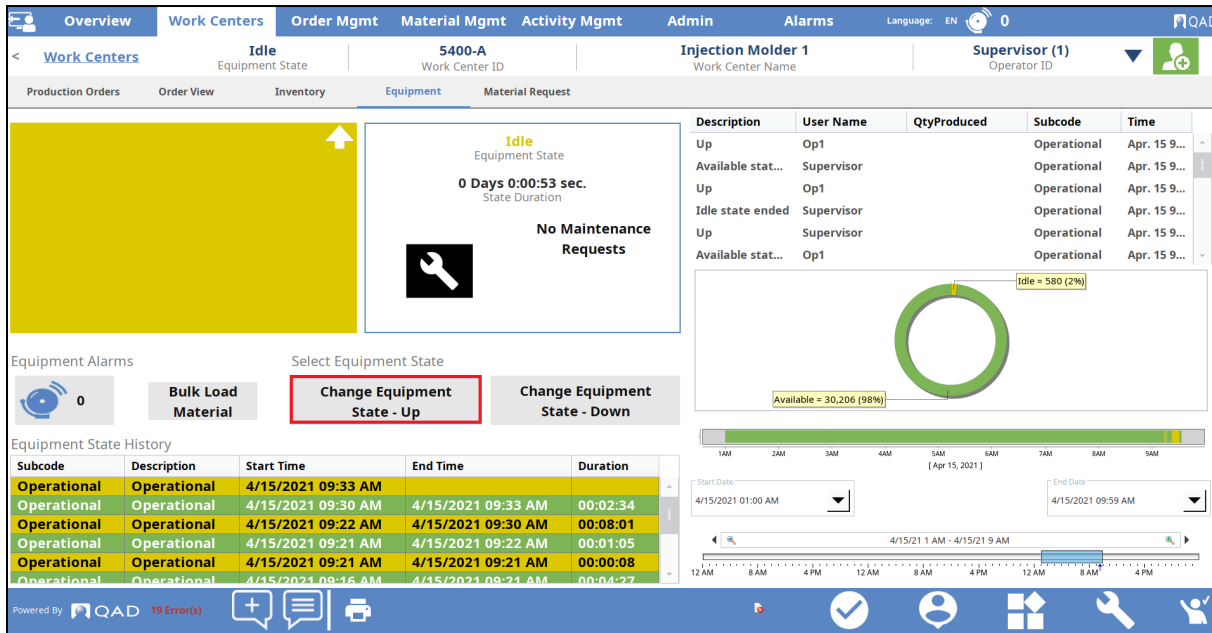
### Purpose

The Idle Machine Non Cost production option allows the user to specify the user that is assigned to a specified equipment state.



**Where**

The production option is applied to the Equipment tab, when changing the equipment state into Idle.



**Setting**

Enter the Character Value which specifies the Idle machine state and the user that is assigned to this state. Separate the values by a semicolon ( ; ):

*<machine state>;<user ID>*

For example, if the Character Value = Idle;Op1, then the OP1 user is assigned the machine when it is in Idle state.

**Setup**

Field	Setting
-------	---------

Parameter ID	67
Parameter	IdleMachineNonCost
Description	Uses the String column to specify the Idle machine state (specified first) and what user to assign it to separated by a (;)
Character Title	Enter the setup details associated with the Character Value. The Character value is critical for the Idle Machine Non Cost Option, therefore entering the instructions is useful.
Character Value	Enter the Character Value which specifies the Idle machine state and the user that is assigned to this state. Separate the values by a semicolon (;): <machine state>;<user ID> For example, if the Character Value = Idle;Op1, then the OP1 user is assigned the machine when it is in Idle state.

### Example

Follow these steps to change the equipment state to Idle and then verify that the specified user is assigned to this event:

1. In **Production Options** (IdleMachineNonCost), enter Character Value = Idle;Op1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (10)	50100 Molded Pin	1.0%		52 Open	Available		0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%		30 Open	Available		0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%		11 Open	Available	SFAdmin	0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%		16 Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%		6 Open	Available		0
5900 Heat Treat				0.0%		0	Available		0

4. Navigate to the Equipment tab.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587532-10				50100	Open	▶		●●●	3/1/2021 3/1/2021	3/1/2021		100	100	97			
2587544-20				50100	Open	▶		●●●	3/10/2021 3/10/2021	3/10/2021		0	10	10		0	
mgw0317a-10				50100	Open	▶		●●●	3/17/2021 3/17/2021	3/17/2021		100	100	100			
mgw0317b-10				50100	Open	▶		●●●	3/17/2021 3/17/2021	3/17/2021		100	100	100			
mgw0317c-10				50100	Open	▶		●●●	3/17/2021 3/17/2021	3/17/2021		100	100	100			
mgw0317d-10				50100	Open	▶		●●●	3/17/2021 3/17/2021	3/17/2021		100	100	100			
mgw0317e-10				50100	Open	▶		●●●	3/17/2021 3/17/2021	3/17/2021		100	100	100			
mgw0318a-10				50100	Open	▶		●●●	3/18/2021 3/18/2021	3/18/2021		100	100	100			
2587562-10				50100	Open	▶		●●●	3/24/2021 3/31/2021	3/31/2021		100	10	10			

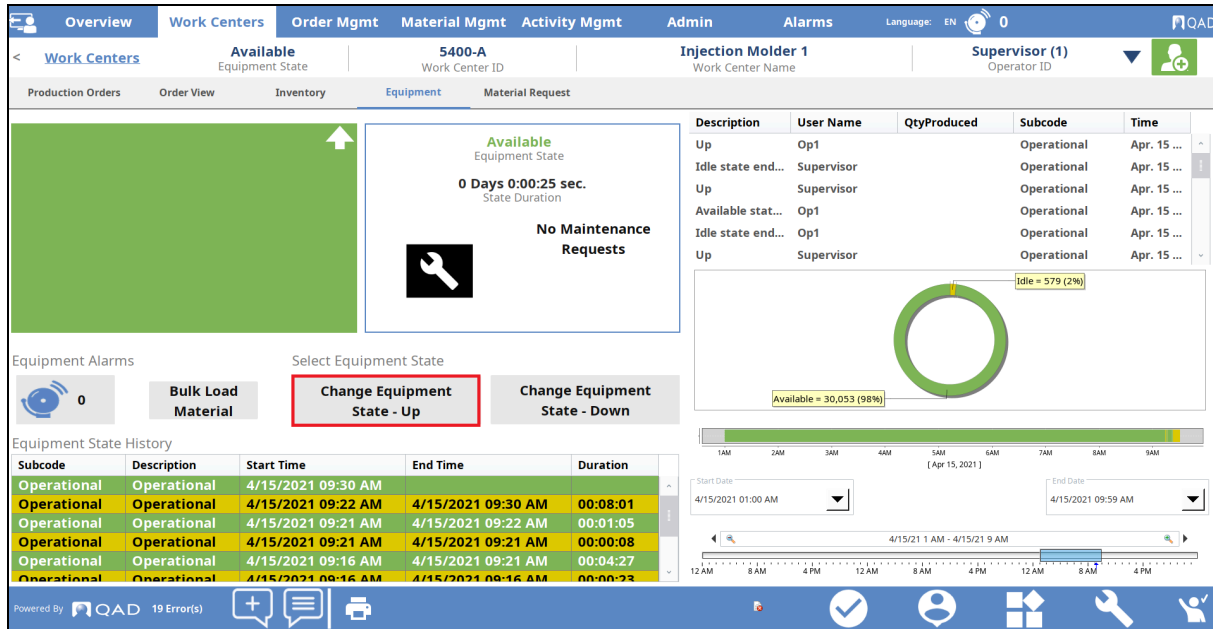
5. Change the equipment state to Idle.

**Idle**  
Equipment State  
0 Days 0:00:53 sec.  
State Duration  
No Maintenance Requests

**Change Equipment State - Up**

Subcode	Description	Start Time	End Time	Duration
Operational	Operational	4/15/2021 09:33 AM	4/15/2021 09:33 AM	00:02:34
Operational	Operational	4/15/2021 09:22 AM	4/15/2021 09:30 AM	00:08:01
Operational	Operational	4/15/2021 09:21 AM	4/15/2021 09:22 AM	00:01:05
Operational	Operational	4/15/2021 09:21 AM	4/15/2021 09:21 AM	00:00:08
Operational	Operational	4/15/2021 09:16 AM	4/15/2021 09:21 AM	00:04:27

6. After a couple minutes, change the equipment state back to Available.



7. In Production Execution Events, verify that the correct user was assigned to machine when it was in Idle state.

The screenshot shows the 'Production Execution Events' table with the following data rows:

Create Date	Create Date by User	Timezone	Type	Type	Duration	Site	Production Line	Work Center	Work Machine	Employee ID	Op	Reason Type	Reason Code	Sub Type	Reason description
15.04.2021 00:39:41			Equipment State Change	Available	0.00	10-200		5400	A	supv1	0	Uptime	Avail	Operational	Operational
15.04.2021 00:39:41			Equipment State Duration	Idle	6.58	10-200		5400	A	op1	0	Uptime	Avail	Operational	Operational
15.04.2021 00:33:05			Equipment State Change	Idle	0.00	10-200		5400	A	op1	0	Uptime	Avail	Operational	Operational

## View Category

The following production options are related to how the user interacts and sees data on the PE screens.

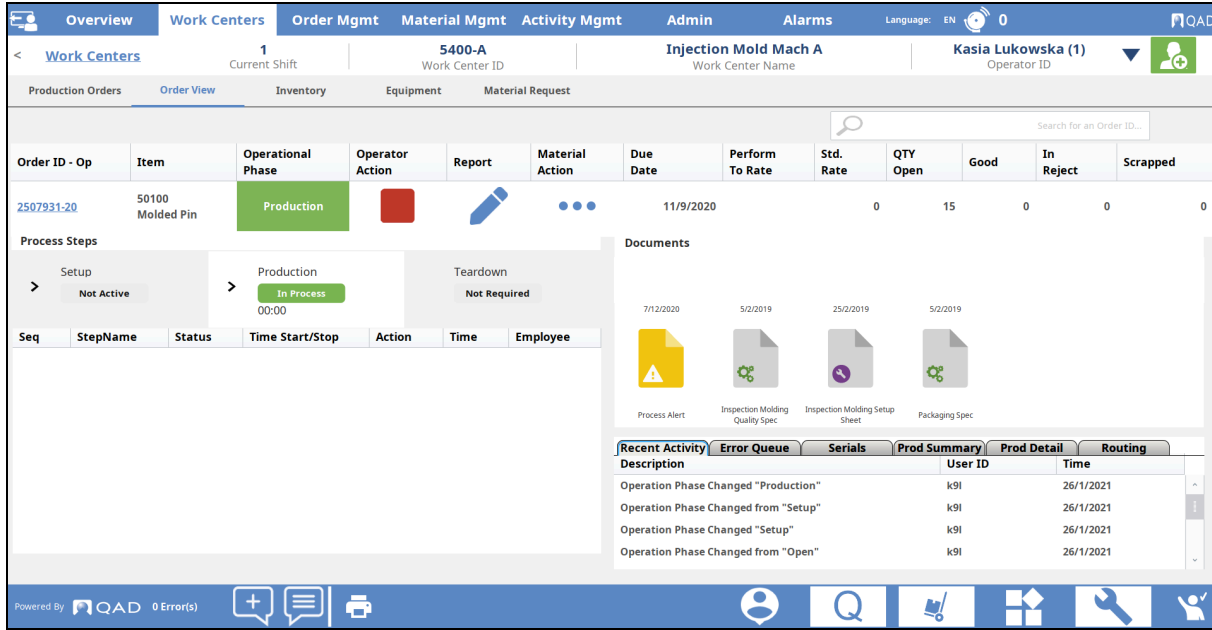
### Order View On Order Active

#### Purpose

The Order View On Order Archive production option allows the user to specify whether the Order View tab is automatically shown to the user when the production order is changed to an active state.

#### Where

The production option is applied to the Production Orders tab in PE.



### Setting

Enter the Boolean Value which determines whether the user is automatically directed to the Order View tab after moving the production order to the Active state:

- If Boolean = 1, the user is automatically directed to the Order View tab.
- If Boolean = 0, the user is NOT automatically directed to the Order View tab.

### Setup

Field	Setting
Parameter ID	4
Parameter	OrderViewOnOrderActivate
Description	Uses the Boolean column to specify whether the Order View will be automatically shown to the user when an order is changed to an active state at the specified production entity.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the OrderViewOnOrderActivate Option, therefore entering the instructions would be useful.
Boolean Value	Enter the Boolean Value which determines whether the user is automatically directed to the Order View tab after moving the production order to the Active state. Select from the following options: <ul style="list-style-type: none"> <li>• 1. The user is automatically prompted to the Order View tab.</li> <li>• 0. The user is NOT automatically prompted to the Order View tab.</li> </ul>

### Example

Follow these steps to move a production order from an Open phase to a Production phase and then verify that the user is automatically directed to the Order View tab:

1. In **Production Options** (OrderViewOnOrderActivate), enter Boolean Value = 1.

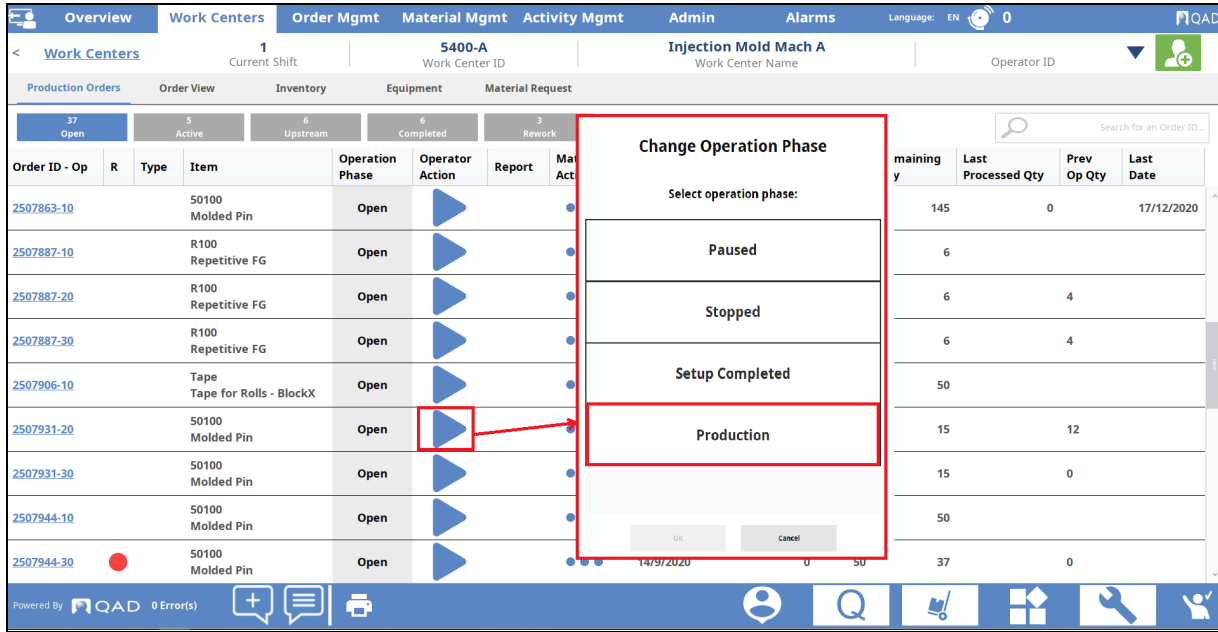
2. Log into PE.
3. Log in to the work center against which you applied the setting.

Work Center	Active Requests	ID Zamówienia	Indeks	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Komentarze
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.8036330308%	5	Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.1819181918%	5	Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.454545454545%	5	Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.589%	40	Production	Available		0
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available		0
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available		0
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available		0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%	3		Available		0
5500-A Assembly Cell A	2			0.0%	0		Available		0
5500-B		2502531	00100	14.0000000000%	2	Open	Available		0

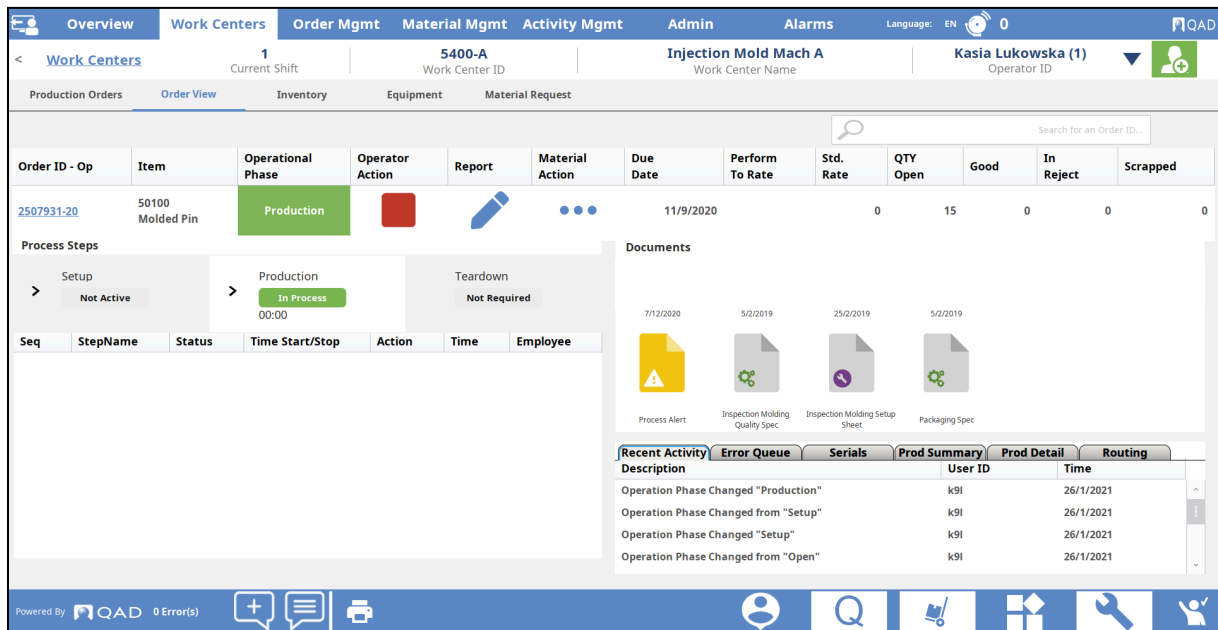
4. Find a production order in the Open phase.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2507863-10			50100 Molded Pin	Open	▶		●●●	3/8/2020	0.00%	100	200	145	0		17/12/2020
2507887-10			R100 Repetitive FG	Open	▶		●●●	31/8/2020		100	10	6			
2507887-20			R100 Repetitive FG	Open	▶		●●●	31/8/2020		110	10	6	4		
2507887-30			R100 Repetitive FG	Open	▶		●●●	31/8/2020		0	10	6	4		
2507906-10			Tape Tape for Rolls - BlockX	Open	▶		●●●	25/8/2020		0.1	50	50			
2507931-20			50100 Molded Pin	Open	▶		●●●	11/9/2020		0	15	15	12		
2507931-30			50100 Molded Pin	Open	▶		●●●	11/9/2020		0	15	15	0		
2507944-10			50100 Molded Pin	Open	▶		●●●	14/9/2020		0	50	50			
2507944-30	●		50100 Molded Pin	Open	▶		●●●	14/9/2020		0	50	37	0		

5. Start working on the production order by moving it to the Production phase.



6. Verify that the user is automatically directed to the Order View tab.



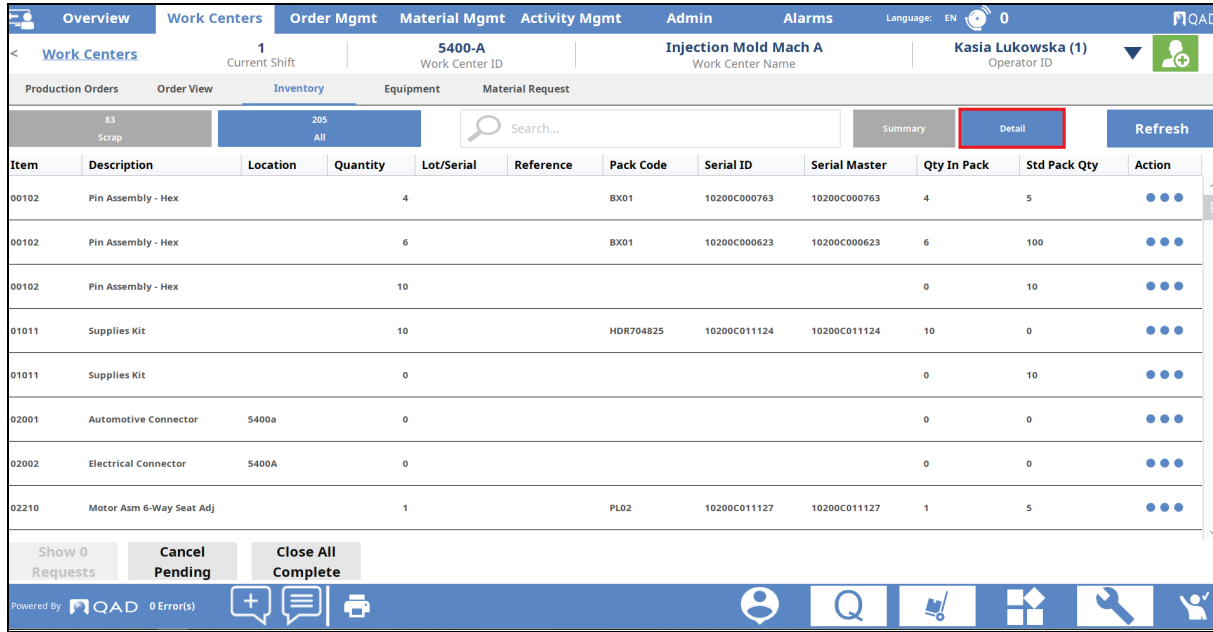
## Default Inventory View

### Purpose

The Default Inventory View production option allows the user to specify whether the General or Detail view (Inventory summary or details) is displayed when navigating to the Inventory tab.

### Where

The production option is applied to the Inventory tab.



### Setting

Enter the Boolean Value for this option which determines whether the General or Detail view is displayed when navigating to the Inventory tab:

- If Boolean =1, the Detailed view is displayed when navigating to the Inventory tab.
- If Boolean = 0, the General view is displayed when navigating to the Inventory tab. This is the default setting.

### Setup

Field	Setting
Parameter ID	9
Parameter	DefaultInventoryView
Description	Uses the Boolean column to specify whether the Inventory screen will default to the General or Detail view. 0 = General, 1 = Detail, defaults to General when not configured.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Default Inventory View Option, therefore entering the instructions would be useful.
Boolean Value	Enter the Boolean Value for this option which determines whether the General or Detail view is displayed when navigating to the Inventory tab: <ul style="list-style-type: none"> <li>• <b>1.</b> The Detailed view is displayed when navigating to the Inventory tab.</li> <li>• <b>0.</b> The General view is displayed when navigating to the Inventory tab. This is the default setting.</li> </ul>

### Example

Follow these steps to navigate to the Inventory tab and to verify the correct view is displayed:

1. In **Production Options** (DefaultInventoryView), enter Boolean Value = 1.
2. Log into PE.

3. Log in to the work center against which you applied the setting.

Widok ogólny		Gniazda produkcyjne		Order Mgmt	Material Mgmt	Activity Mgmt	Language: EN	0	QAD	
Work Center	Active Requests	ID Zamówienia	Indeks	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Komentarze	
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.863093333333%	5	Production	Available		0	
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.181818181818%	5	Open	Available		0	
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.45454545454545%	5	Open	Available		0	
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0	
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.580%	40	Production	Available		0	
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available		0	
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available		0	
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available		0	
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0	
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.296666666667%	3		Available		0	
5500-A Assembly Cell A	2			0.0%	0		Available		0	
5500-B		2502531	00100	12.890000000000%	2	Open	Available		0	

4. Navigate to the Inventory tab.

Overview		Work Centers		Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	0	QAD				
Work Centers		1 Current Shift	5400-A Work Center ID	Injection Mold Mach A Work Center Name		Kasia Lukowska (1) Operator ID									
Production Orders		Order View	<b>Inventory</b>	Equipment	Material Request										
96 Open		6 Active		7 Upstream		6 Completed		3 Rework							
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2502499-10	●		50100 Molded Pin	Production	■	🔧	●●●	18/9/2020	20.100%	100	80,000	73,928.8	0		22/1/2021
2507483-10			50201 Small Bushing	Production	■	🔧	●●●	18/9/2020		100	7,000	6,890			
2507608-10	●		50100 Molded Pin	Production	■	🔧	●●●	2/9/2020		100	10	-9			
2507655-10			50100 Molded Pin	Production	■	🔧	●●●	22/7/2020		0	150	-11	10		25/1/2021
2507931-20			50100 Molded Pin	Production	■	🔧	●●●	11/9/2020		0	15	15		12	
2507944-20			50100 Molded Pin	Production	■	🔧	●●●	14/9/2020		0	50	30		0	0

5. Verify that the Detailed view (as shown below) is displayed in the Inventory tab.

The screenshot shows the QAD Work Centers interface. At the top, there are tabs for Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt, Admin, and Alarms. The current view is 'Work Centers' for 'Injection Mold Mach A' at '5400-A' Work Center ID, operated by 'Kasia Lukowska (1)'. Below the header, there are buttons for 'Production Orders', 'Order View', 'Inventory', 'Equipment', and 'Material Request'. A search bar is present. The main table lists production orders with columns: Item, Description, Location, Quantity, Lot/Serial, Reference, Pack Code, Serial ID, Serial Master, Qty In Pack, Std Pack Qty, and Action. The 'Detail' button for the first row is highlighted in red. At the bottom, there are buttons for 'Show 0 Requests', 'Cancel Pending', and 'Close All Complete'.

Item	Description	Location	Quantity	Lot/Serial	Reference	Pack Code	Serial ID	Serial Master	Qty In Pack	Std Pack Qty	Action
00102	Pin Assembly - Hex		4			BX01	10200C000763	10200C000763	4	5	...
00102	Pin Assembly - Hex		6			BX01	10200C000623	10200C000623	6	100	...
00102	Pin Assembly - Hex		10						0	10	...
01011	Supplies Kit		10			HDR704825	10200C011124	10200C011124	10	0	...
01011	Supplies Kit		0						0	10	...
02001	Automotive Connector	5400a	0						0	0	...
02002	Electrical Connector	5400A	0						0	0	...
02210	Motor Asm 6-Way Seat Adj		1			PL02	10200C011127	10200C011127	1	5	...

## Count Scrap

### Purpose

The Count Scrap production option allows the user to specify whether the reported scrap quantity is included in the Performance Rate.

### Where

The production option is applied to the Production Orders tab when scrap quantities are reported and the Performance to Rate value changes.

The screenshot shows the QAD Work Centers interface in a detailed view for production order '2507483-10'. The 'Operational Phase' is 'Production'. The 'Perform To Rate' field is highlighted in red and shows a value of 7.00%. The 'Scrapped' quantity is 35. Below the main table, there are sections for 'Process Steps' and 'Documents'. The 'Process Steps' table shows three steps, all with a status of 'Pending'. The 'Documents' section shows four documents: 'Process Alert', 'Inspection Molding Quality Spec', 'Inspection Molding Setup Sheet', and 'Packaging Spec'. At the bottom, there is a 'Recent Activity' table showing several entries with descriptions like 'Order Condition Changed "Partially Complete"'.

Order ID - Op	Item	Operational Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	QTY Open	Good	In Reject	Scrapped
2507483-10	50201 Small Bushing	Production				18/9/2020	7.00%	100	6,855	110	0	35

Seq	StepName	Status	Time Start/Stop	Action	Time	Employee
1	SharedTemplate	Launched			16:01	
2	SharedTemplate	Pending				
3	SharedTemplate	Pending				

Recent Activity	Error Queue	Serials	Prod Summary	Prod Detail	Routing
Order Condition Changed "Partially Complete"				k9l	26/1/2021
Rule Threshold Broken				k9l	26/1/2021
Order Condition Changed "Partially Complete"				k9l	26/1/2021
Order Condition Changed "Partially Complete"				k9l	26/1/2021

### Setting

Enter the Boolean Value for this option which determines whether the scrap quantity is included in the

Performance to Rate:

- If Boolean =1, the reported scrap quantities are included in the Performance to Rate calculation.
- If Boolean = 0, the reported scrap quantities are NOT included in the Performance to Rate calculation.

Setup

Field	Setting
Parameter ID	17
Parameter	CountScrap
Description	Uses the Boolean column to specify whether scrap is included in the Performance Rate.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Count Scrap Option, therefore entering the instructions would be useful.
Boolean Value	Enter the Boolean Value for this option which determines whether the scrap quantity is included in the Performance to Rate: <ul style="list-style-type: none"> <li>• <b>1.</b> The reported scrap quantities are included in the Performance to Rate calculation.</li> <li>• <b>0.</b> The reported scrap quantities are NOT included in the Performance to Rate calculation.</li> </ul>

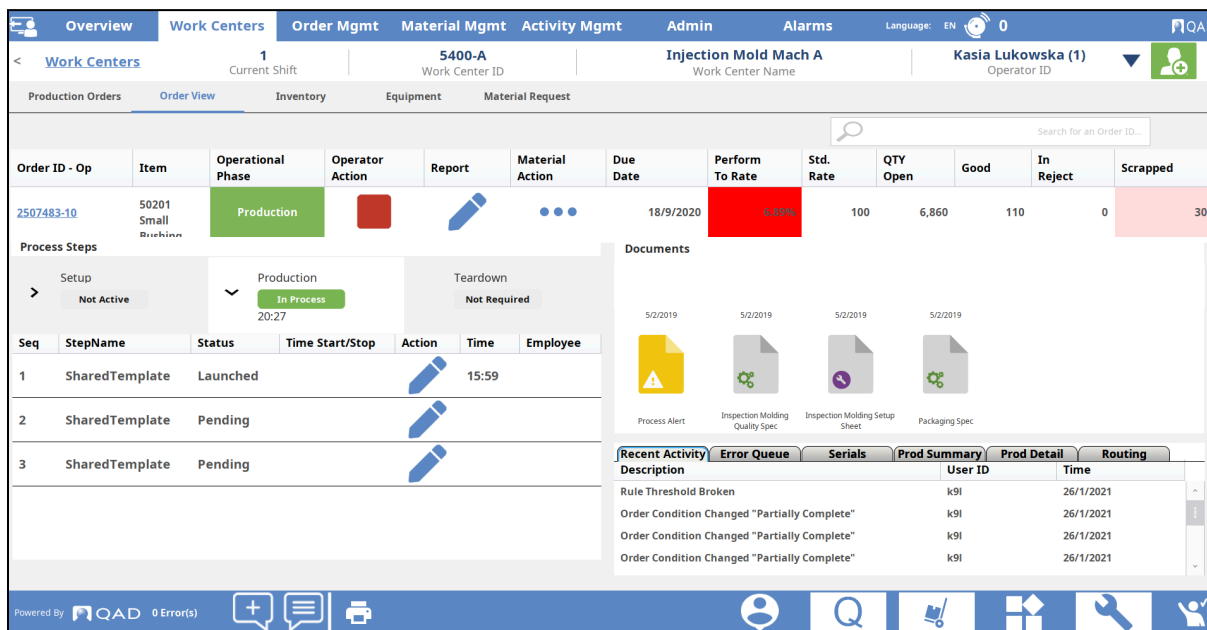
Example

Follow these steps to report production with scrap quantities and verify that those quantities are included in the Performance to Rate calculation:

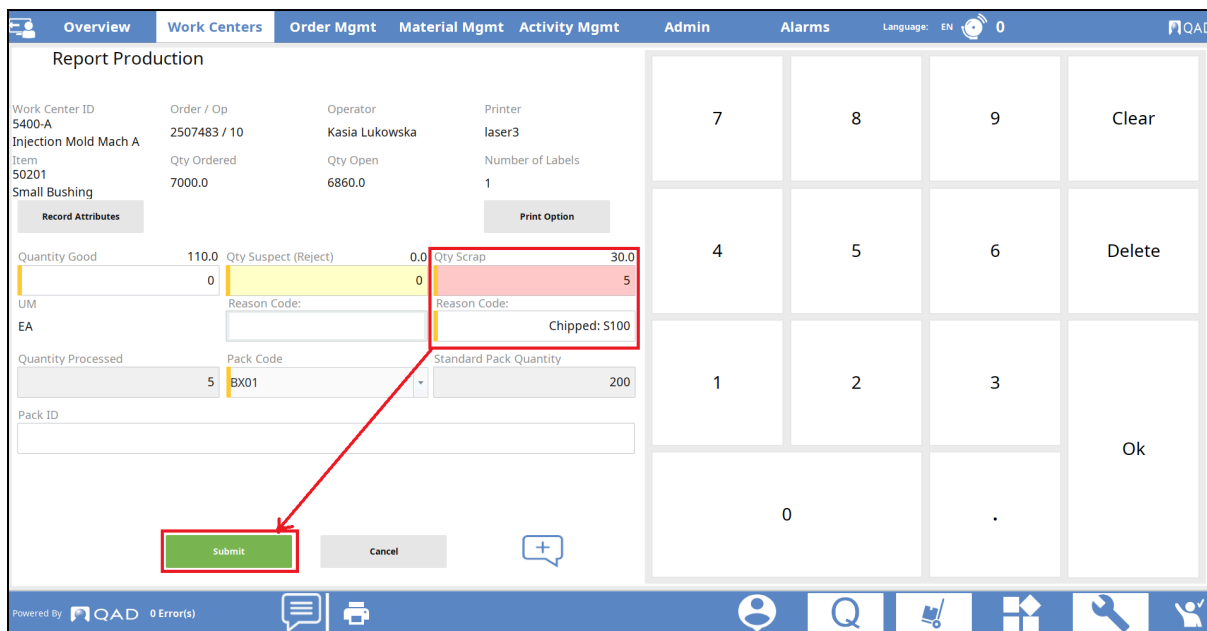
1. In **Production Options** (CountScrap), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Widok ogólny		Gniazda produkcyjne		Order Mgmt	Material Mgmt	Activity Mgmt	Language: EN	0	QAD
Work Center	Active Requests	ID Zamówienia	Indeks	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Komentarze
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.863633636%		5 Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.1818181818%		5 Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.454545454545%		5 Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%		5 Open	Available		0
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.589%		40 Production	Available		0
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%		14 Production	Available		0
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%		15 Production	Available		0
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%		9 Production	Available		0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%		1 Open	Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%		3 Open	Available		0
5500-A Assembly Cell A	2			0.0%		0 Open	Available		0
5500-B		2502531	00100	24.0000000000%		2 Open	Available		0

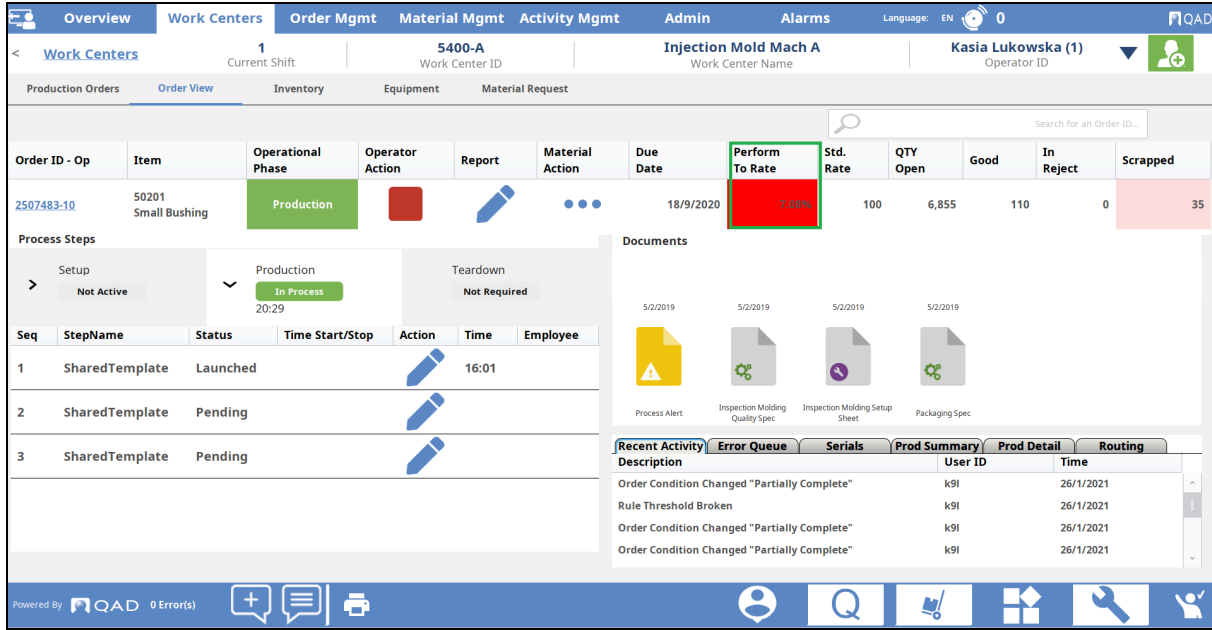
4. Select the production order to report against. Check the Performance to Rate value.



5. Report production with the scrap quantities.



6. Verify the Performance To Rate was recounted and the scrap quantity was included in the calculation.



## Performance Band

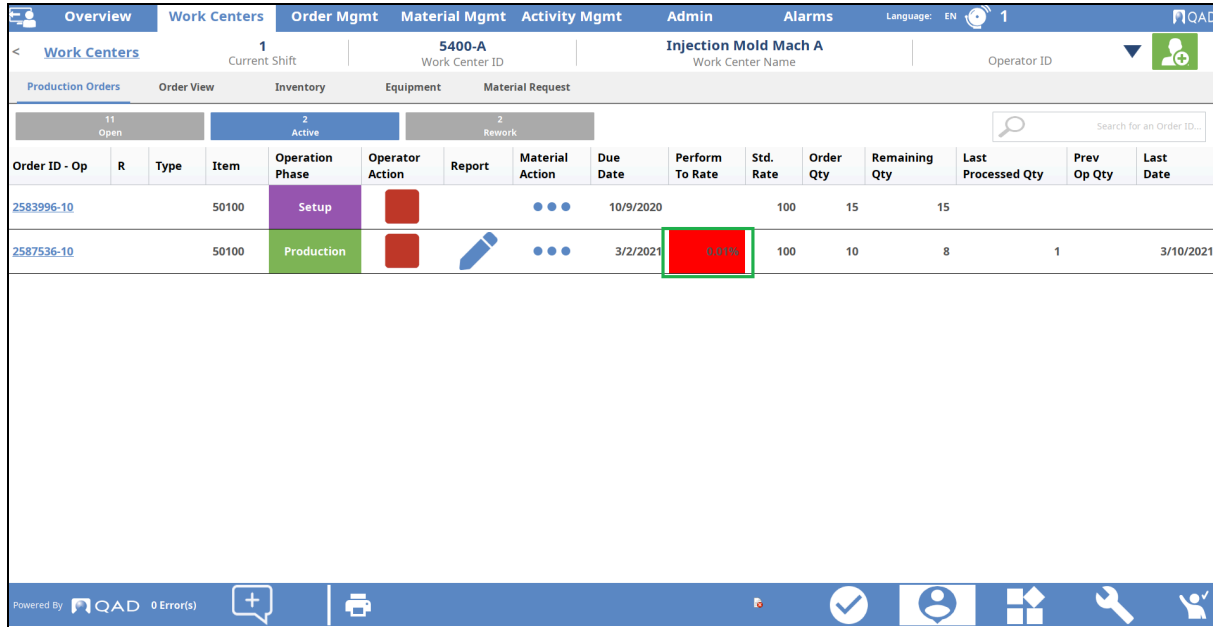
### Purpose

The Performance Band production option allows the user to specify the ranges in which the Performance to Rate field is displayed in different colors. For example, you can specify that the production Performance To Rate value turns a red when the rate falls within the 50%- 70% range. The following color options are available:

- Red
- Yellow
- Green
- Blue
- Magenta

### Where

The production option is applied to the Performance to Rate field on the Production Orders tab.



### Setting

In the following format, enter the Character Value which determines which background color is used for the Performance to Rate field based on the value range:

*<min value>;<max value>;<color code>*

For example, if you want the Performance To Rate field to display a Red background when the value is 80%-95%, you would enter the following: 80;95;255,0,0

The last three of the values represent the color. The following list is are the color options available and their color codes:

- Red (255,0,0)
- Yellow (255,255,0)
- Green (0,255,0)
- Blue (0,0,225)
- Magenta (255,0,255)

### Setup

Field	Setting
Parameter ID	18
Parameter	PerformanceBand
Description	Uses the char column to specify a range and a color in rgb for a performance band. For example, 80%-95% in red would be 80;95;255,0,0
Character Title	Enter the setup details associated with the Character Value. The Character Value is critical for the Performance Band Option, therefore entering the instructions is useful.
Character Value	In the following format, enter the Character Value which determines which background color

is used for the Performance to Rate field based on the value range:  
 <min value>;<max value>;<color code>  
 For example, if you want the Performance To Rate field to display a Red background when the value is 80%-95%, you would enter the following: 80;95;255,0,0  
 The last three of the values represent the color. The following list is are the color options available and their color codes:

- Red (255,0,0)
- Yellow (255,255,0)
- Green (0,255,0)
- Blue (0,0,225)
- Magenta (255,0,255)

**Example**

Follow these steps to set the Performance to Rate field to turn a specific color when the value falls within the specified range:

1. In **Production Options** (PerformanceBand), enter Character Value = 0;1;255,0,0 ( Performance To Rate turns Red if the value is between 0%-1%).
2. Log into PE.
3. Log into the work center against which you applied the setting.

Overview	Work Centers	Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN	1	QAD
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1	1	2583995 (2)	50100 Molded Pin	1270.0%	11	Open	Available		0
5400-B Injection Molder 2		2587540	50100 Molded Pin	0.0%	4	Open	Available	SFAdmin	0
5400-C Injection Molder 3				0.0%	0		Available		0
5500-A Assembly Cell 1	5	2584016 (3)	00100 Pin Assembly - Star	0.0%	8	Open	Down	SFAdmin	0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	0.0%	3	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

4. Navigate to the work center where there are active production orders and quantities have been reported against them and verify that the Performance To Rate column displays the correct color. In the image below, the Performance to Rate is 0.01% so therefore it is displayed in red.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583996-10			50100	Setup				10/9/2020		100	15	15			
2587536-10			50100	Production				3/2/2021	0.00%	100	10	8		1	3/10/2021

## Overview Style

### Purpose

The Overview Style production option allows the user to specify which display format is used for the Overview screen on a specified terminal. The format options include Default and Global Equipment.

### Where

The production option is applied to the Overview tab.

Work Center	Orders	Active
Injection Mold Mach A	43	1
Injection Mold Mach B	14	0
Injection Mold Mach C	15	0
Injection Mold Mach D	9	0
Injection Mold Mach E	1	0
Injection Mold Mach F	3	0
Assembly Cell A	2	0
Assembly Cell B	2	0
Assembly Cell C	3	0
Wire Trimming	5	0
Electrical Testing	5	0
Plate Assembly	5	0
Inspection	5	0
Heat Treat	12	0

### Setting

Enter the Terminal ID and Character Value for this option:

- Terminal ID.** Specifies which computer terminal displays the specified Overview screen format.

- **Character Value.** Specifies if the computer terminal displays the Default or Global Equipment view:

**Default View**



**Global Equipment View**



**Setup**

Field	Setting
Parameter ID	32
Parameter	OverviewStyle
Description	Uses the Character column to specify which style of overview appears in the application

	based on the terminal. Options available are 'default' and 'global equipment'. If not specified 'default' will be used.
Terminal ID (KEY)	Enter the computer name which displays the specified Overview screen format.
Character Title	Enter the setup details associated with the Character Value. The Character value is critical for the Overview Style Option, therefore entering the instructions would be useful.
Character Value	Enter the Character Value that determines the Overview screen format. The following options are available: <ul style="list-style-type: none"> <li>• Default</li> <li>• Global equipment</li> </ul>

### Example

Follow these steps to set the Overview screen format and then verify that the correct format is displayed:

1. In **Production Options** (OverviewStyle), enter Character Value = Global Equipment.
2. Log into PE and navigate to the Overview tab.
3. Verify the Overview screen is displayed in the Global Equipment format.



## US Date Format

### Purpose

The US Date Format allows the user to specify whether dates in PE are displayed in the US (mm/dd/yy) or European (dd/mm/yy) format.

### Where

The production option is applied to any screen where the date is displayed.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2502499-10	●		50100 Molded Pin	Production				18/9/2020	20.00%	100	80,000	73,928.8	0		22/1/2021
2507483-10			50201 Small Bushing	Production				18/9/2020	6.00%	100	7,000	6,855	0		26/1/2021
2507608-10	●		50100 Molded Pin	Production				2/9/2020		100	10	-9			
2507655-10			50100 Molded Pin	Production				22/7/2020		0	150	-11	10		25/1/2021
2507931-20			50100 Molded Pin	Production				11/9/2020		0	15	4	0	12	26/1/2021
2507944-20			50100 Molded Pin	Production				14/9/2020		0	50	30	0	0	25/1/2021

### Setting

Enter the Boolean Value for this option which specifies if the dates in PE are displayed in the US (mm/dd/yy) or European (dd/mm/yy) format:

- If Boolean =1, dates are displayed in the US format (mm/dd/yy).
- If Boolean = 0, dates are displayed in the European format (dd/mm/yy).

### Setup

Field	Setting
Parameter ID	35
Parameter	USDateFormat
Description	Uses the Boolean column to specify whether dates will be displayed as mm/dd/yy (true) or dd/mm/yy (false).
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Us Date Format Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option which specifies if the dates in PE are displayed in the US (mm/dd/yy) or European (dd/mm/yy) format: <ul style="list-style-type: none"> <li>● 1. The dates are displayed in the US format (mm/dd/yy).</li> <li>● 0. The dates are displayed in the European format (dd/mm/yy).</li> </ul>

### Example

Follow these steps to set up the date format and then verify they are displayed correctly:

1. In **Production Options** (USDateFormat), enter Boolean Value = 0.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Widok ogólny		Gniazda produkcyjne		Order Mgmt	Material Mgmt	Activity Mgmt		Language: EN 0		QAD
Work Center	Active Requests	ID Zamówienia	Indeks	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Komentarze	
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	95.8636103330%	5	Production	Available		0	
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	25.1818181818%	5	Open	Available		0	
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.454545454545%	5	Open	Available		0	
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0	
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.589%	40	Production	Available		0	
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available		0	
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available		0	
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available		0	
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0	
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2066666667%	3		Available		0	
5500-A Assembly Cell A	2			0.0%	0		Available		0	
5500-B		2502531	00100	12.0000000000%	2	Open	Available		0	

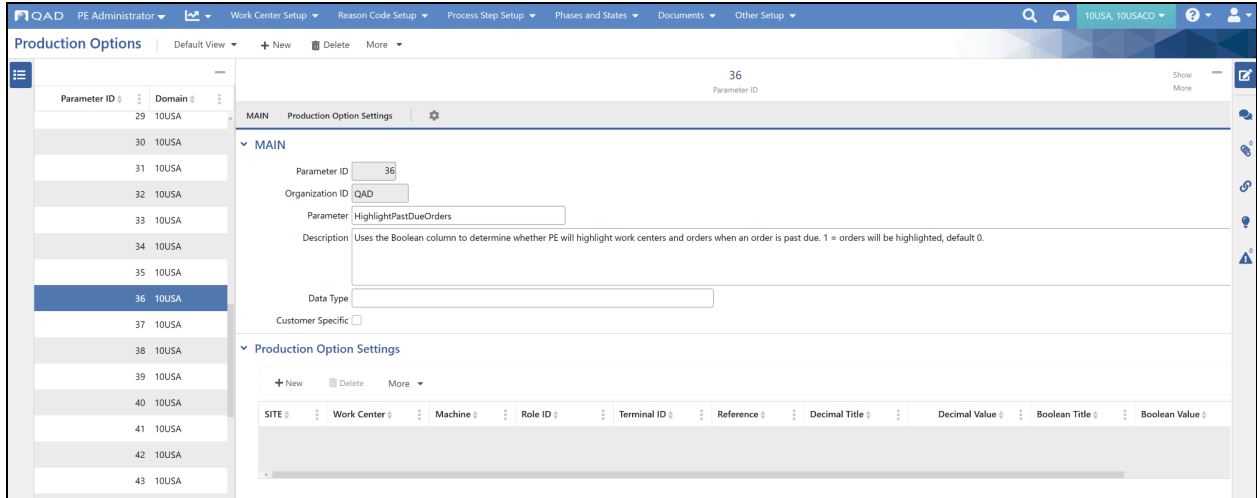
4. Navigate to the Production Order tab and verify the date is displayed in the European format (dd/mm/yy).

Overview		Work Centers		Order Mgmt	Material Mgmt	Activity Mgmt	Admin	Alarms	Language: EN 0		QAD				
Work Centers		1	5400-A	Injection Mold Mach A		Kasia Lukowska (1)									
Production Orders		Order View	Inventory	Equipment	Material Request										
36 Open		6 Active		7 Upstream		6 Completed		3 Rework							
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2502499-10	●		50100 Molded Pin	Production			●●●	18/9/2020	20.00%	100	80,000	73,928.8	0		22/1/2021
2507483-10			50201 Small Bushing	Production			●●●	18/9/2020	6.00%	100	7,000	6,855	0		26/1/2021
2507608-10	●		50100 Molded Pin	Production			●●●	2/9/2020		100	10	-9			
2507655-10			50100 Molded Pin	Production			●●●	22/7/2020		0	150	-11	10		25/1/2021
2507931-20			50100 Molded Pin	Production			●●●	11/9/2020		0	15	4	0	12	26/1/2021
2507944-20			50100 Molded Pin	Production			●●●	14/9/2020		0	50	30	0	0	25/1/2021

## Highlight Past Due Orders

### Purpose

The Highlight Past Due Orders production option allows the user to determine whether work centers and production orders that are past due date are highlighted in order to alarm the user.



**Where**

The production option is applied to the Production Orders tab for production orders that are past due.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2502499-10	●		50100 Molded Pin	Production	■	🔧	●●●	10/9/2021	50.00%	100	80,000	73,928.8	0		22/1/2021
2507483-10			50201 Small Bushing	Production	■	🔧	●●●	10/9/2021	5.00%	100	7,000	6,855	0		26/1/2021
2507608-10	●		50100 Molded Pin	Production	■	🔧	●●●	2/9/2020		100	10	-9			
2507655-10			50100 Molded Pin	Production	■	🔧	●●●	20/7/2020		0	150	-11	10		25/1/2021
2507931-20			50100 Molded Pin	Production	■	🔧	●●●	11/9/2020		0	15	4	0	12	26/1/2021
2507944-20			50100 Molded Pin	Production	■	🔧	●●●	10/9/2021		0	50	30	0	0	25/1/2021

**Setting**

Enter the Boolean Value for this option which specifies if PE highlights work centers and production orders that are past due:

- If Boolean =1, then production orders that are past due are highlighted.
- If Boolean = 0, then production orders that are past due are NOT highlighted.

**Setup**

Field	Setting
Parameter ID	36

Parameter	HighlightPastDueOrders
Description	Uses the Boolean column to determine whether PE will highlight work centers and orders when an order is past due. 1 = orders will be highlighted, default 0.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Highlight Past Due Orders Option, therefore entering the instructions would be useful.
Boolean Value	Enter the Boolean Value for this option which specifies if PE highlights work centers and production orders that are past due: <ul style="list-style-type: none"> <li>• 1. Production orders that are past due are highlighted.</li> <li>• 0. Production orders that are past due are NOT highlighted.</li> </ul>

**Examples**

Follow these steps to navigate to the Production Orders tab and verify that production orders that are past due are displayed correctly:

1. In **Production Options** (HighlightPastDueOrders), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.863629330%	5	Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.1818181818%	5	Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.454545454545%	5	Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.589%	40	Production	Available	Op2 - Blue (2)	0
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available		0
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available		0
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available		0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%	3		Available		0
5500-A Assembly Cell A	2			0.0%	0		Available		0
5500-B		2502531	00100	1.0000000000%	2	Open	Available		0

4. Navigate to the Production Order tab and verify that any production order with a past due date is highlighted in red.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2502499-10	●		50100 Molded Pin	Production	■	🔍	●●●	10/9/2020	100%	100	80,000	73,928.8	0		22/1/2021
2507483-10			50201 Small Bushing	Production	■	🔍	●●●	10/9/2020	100%	100	7,000	6,855	0		26/1/2021
2507608-10	●		50100 Molded Pin	Production	■	🔍	●●●	10/9/2020		100	10	-9			
2507655-10			50100 Molded Pin	Production	■	🔍	●●●	10/9/2020		0	150	-11	10		25/1/2021
2507931-20			50100 Molded Pin	Production	■	🔍	●●●	10/9/2020		0	15	4	0	12	26/1/2021
2507944-20			50100 Molded Pin	Production	■	🔍	●●●	10/9/2020		0	50	30	0	0	25/1/2021

## Use Order Number

### Purpose

The Use Order Number production option allows the user to specify whether the system uses the production order ID or the production order number to identify production orders.

### Where

The production option is applied to the Production Order and Order View tabs.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583996-10			50100	Setup	■		●●●	10/9/2020		100	15	15			
2587536-10			50100	Production	■	🔍	●●●	3/2/2021	100%	100	10	8	1		3/10/2021

### Setting

Enter the Boolean Value for this option which determines whether production orders are identified by the production order ID or the production order number:

- If Boolean = 1, then the production order number is used.
- If Boolean = 0, then the production order ID is used. This is the default setting.

**Setup**

Field	Setting
Parameter ID	42
Parameter	UseOrderNumber
Description	Uses the Boolean column to specify whether the Order ID is replaced with the Order Number within PE. (1 = Order Number. 0 = Order ID. Default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Use Order Number Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option which determines whether production orders are identified by the production order ID or the production order number: <ul style="list-style-type: none"> <li>• <b>1.</b> The production order number is used.</li> <li>• <b>0.</b> The production order ID is used. This is the default setting.</li> </ul>

**Example**

Follow these steps to navigate to the Production Order tab and verify the production order ID or number is used to identify production orders:

1. In **Production Options** (UseOrderNumber), enter Boolean Value = 0.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.82033333333333%	5	Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.18181818181818%	5	Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.4545454545454545%	5	Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.580%	40	Production	Available	Op2 - Blue (2)	0
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available		0
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available		0
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available		0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666666667%	3		Available		0
5500-A Assembly Cell A	2			0.0%	0		Available		0
5500-B		2502531	00100	14.00000000000000%	2	Open	Available		0

4. Navigate to the Production Order tab and verify that the production order ID is displayed.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583996-10			50100	Setup				10/9/2020		100	15	15			
2587536-10			50100	Production				3/2/2021	0.00%	100	10	8	1		3/10/2021

## Production Order Filter Priority

### Purpose

The Production Order Filter Priority production option allows the user to specify the order that the production order filters are displayed in the Production Order tab.

### Where

The production option is applied to the Production Order tab.

Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
<div style="display: flex; justify-content: space-between; border: 1px solid red; padding: 2px;"> <span>36 Open</span> <span>6 Active</span> <span>7 Upstream</span> <span>6 Completed</span> <span>3 Rework</span> </div>															
2502499-10	●		50100 Molded Pin	Production				18/9/2020	20.00%	100	80,000	73,928.8	0		22/1/2021
2507608-10	●		50100 Molded Pin	Production				2/9/2020		100	10	-9			
2507931-10	●		50100 Molded Pin	Complete				11/9/2020		0	15	-5	0		17/12/2020

### Setting

Enter the Character Value which determines the order the production order filters are displayed on the

Production Orders tab. Separate each filter name with a comma:

*<filter 1>,<filter 2>,<filter 3>,<filter 4>,<filter 5>,<filter 6>*

The following filter options are available:

- Open
- Active
- Completed
- Past Due
- Upstream
- Rework

**Note:** All values must be included.

### Setup

Field	Setting
Parameter ID	48
Parameter	ProductionOrderFilterPriority
Description	Uses the char column to create a comma separated list of Production Order screen filters in order of priority. Possible values are Open, Active, Completed, Past Due, Upstream, and Rework. All values should be included.
Character Title	Enter the setup details associated with the Character Value. The Character value is critical for the Production Order Filter Priority Option, therefore entering the instructions is useful.
Character Value	<p>Enter the Character Value which determines the order the production order filters are displayed on the Production Orders tab. Separate each filter name with a comma:</p> <p style="text-align: center;"><i>&lt;filter 1&gt;,&lt;filter 2&gt;,&lt;filter 3&gt;,&lt;filter 4&gt;,&lt;filter 5&gt;,&lt;filter 6&gt;</i></p> <p>The following filter options are available:</p> <ul style="list-style-type: none"> <li>● Open</li> <li>● Active</li> <li>● Completed</li> <li>● Past Due</li> <li>● Upstream</li> <li>● Rework</li> </ul> <p><b>Note:</b> All values must be included.</p>

### Example

Follow these steps to set up the order of the production order filters and then verify they are displayed in the correct order:

1. In **Production Options** (ProductionOrderFilterPriority), set the Character Value to the following:

Open, Active, Upstream, Completed, Rework, Past Due

2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operational Phase	Equipment State	Logged In User	Comments
1000-1 Wire Trimming	1	2507469	02200 Motor Asm 8 Way Seat Adj	55.8636363636%	5	Production	Available		0
1000-2 Electrical Testing		2507469	02200 Motor Asm 8 Way Seat Adj	23.1818181818%	5	Open	Available		0
1000-3 Plate Assembly		2507469	02200 Motor Asm 8 Way Seat Adj	0.454545454545%	5	Open	Available		0
1000-4 Inspection		2507469	02200 Motor Asm 8 Way Seat Adj	0.0%	5	Open	Available		0
5400-A Injection Mold Mach A	3	2502499 (5)	50100 Molded Pin	7.589%	40	Production	Available	Op2 - Blue (2)	0
5400-B Injection Mold Mach B	1	2502473 (2)	50100 Molded Pin	1200.0%	14	Production	Available		0
5400-C Injection Mold Mach C		2502479 (3)	50100 Molded Pin	2400.0%	15	Production	Available		0
5400-D Injection Mold Mach D	2	2507869 (2)	50100 Molded Pin	100.0%	9	Production	Available		0
5400-E Injection Mold Mach E		2502569	50100 Molded Pin	6.125%	1		Available		0
5400-F Injection Mold Mach F		2502505	50100 Molded Pin	12.2966666667%	3		Available		0
5500-A Assembly Cell A	2			0.0%	0		Available		0
5500-B		2502531	00100	74.0909090909%	2	Open	Available		0

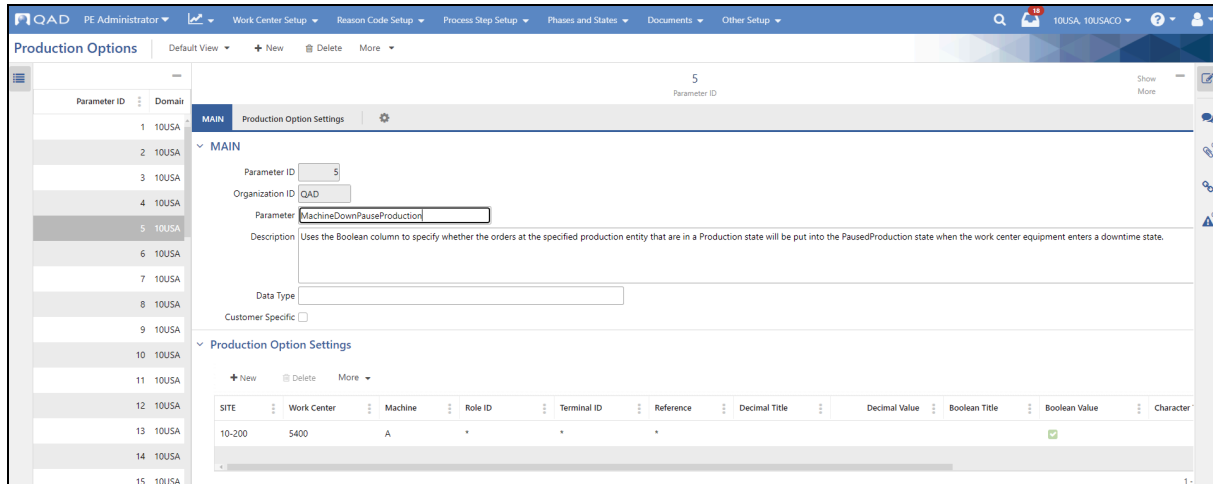
4. Navigate to the Production Order tab and verify the production order filters are displayed in the correct order.

Production Orders		Order View	Inventory	Equipment	Material Request										
36 Open	6 Active	7 Upstream	6 Completed	3 Rework											
Order ID - Op	R	Type	Item	Operation Phase	Operator Action	Report	Material Action	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2502499-10	●		50100 Molded Pin	Production				18/9/2020	20.00%	100	80,000	73,928.8	0		22/1/2021
2507608-10	●		50100 Molded Pin	Production				2/9/2020		100	10	-9			
2507931-10	●		50100 Molded Pin	Complete				11/9/2020		0	15	-5	0		17/12/2020

## Machine Down Pause Production

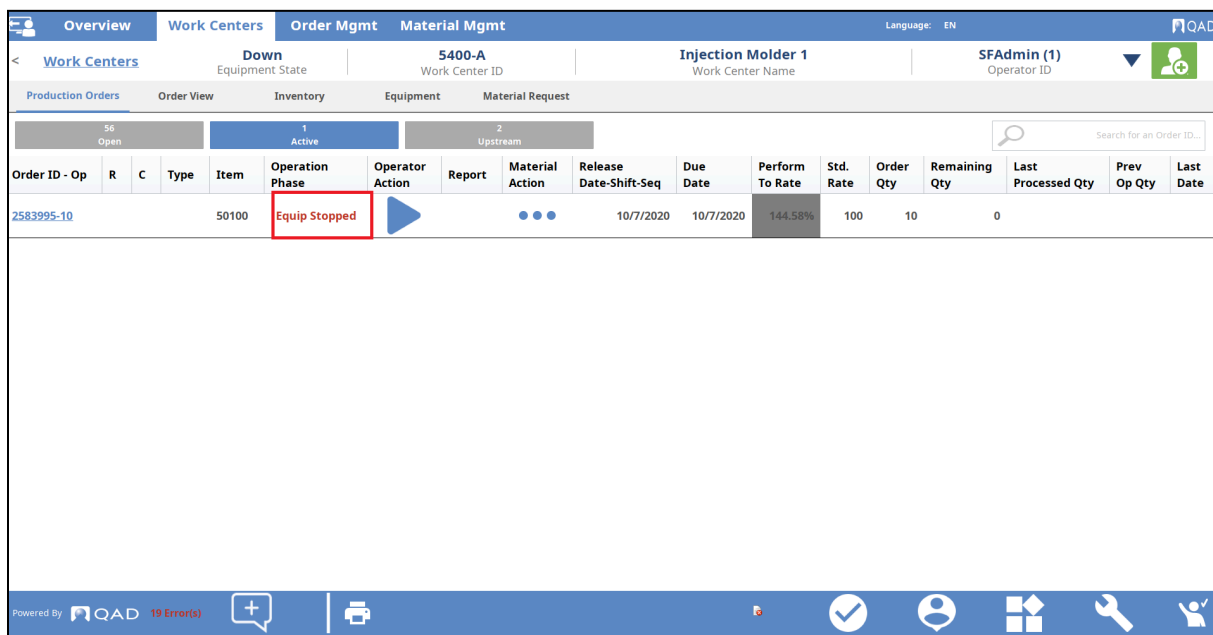
### Purpose

The Machine Down Pause Production option allows the user to specify whether orders in a Production operation phase are put into the Paused Production phase when the work center equipment enters a downtime state.



**Where**

The production option is applied to the Production Orders and Order View tab. The production order’s operation phase is updated when the work center equipment is moved into a Downtime state.



**Setting**

Enter the Boolean Value for this option which determines whether orders in a Production operation phase are put into the Paused Production phase when the work center equipment enters a downtime state:

- If Boolean =1, then the production order’s phase is automatically changed to Paused.
- If Boolean = 0, then the production order’s phase does not change.

**Setup**

Field	Setting
Parameter ID	5

Parameter	MachineDownPauseProduction
Description	Uses the Boolean column to specify whether the orders at the specified production entity that are in a Production state will be put into the PausedProduction state when the work center equipment enters a downtime state.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the MachineDownPauseProduction Option, therefore entering the instructions is useful.
Boolean Value	<p>Enter the Boolean Value for this option which determines whether orders in a Production operation phase are put into the Paused Production phase when the work center equipment enters a downtime state:</p> <ul style="list-style-type: none"> <li>• If Boolean =1, then the production order’s phase is automatically changed to Paused.</li> <li>• If Boolean = 0, then the production order’s phase does not change.</li> </ul>

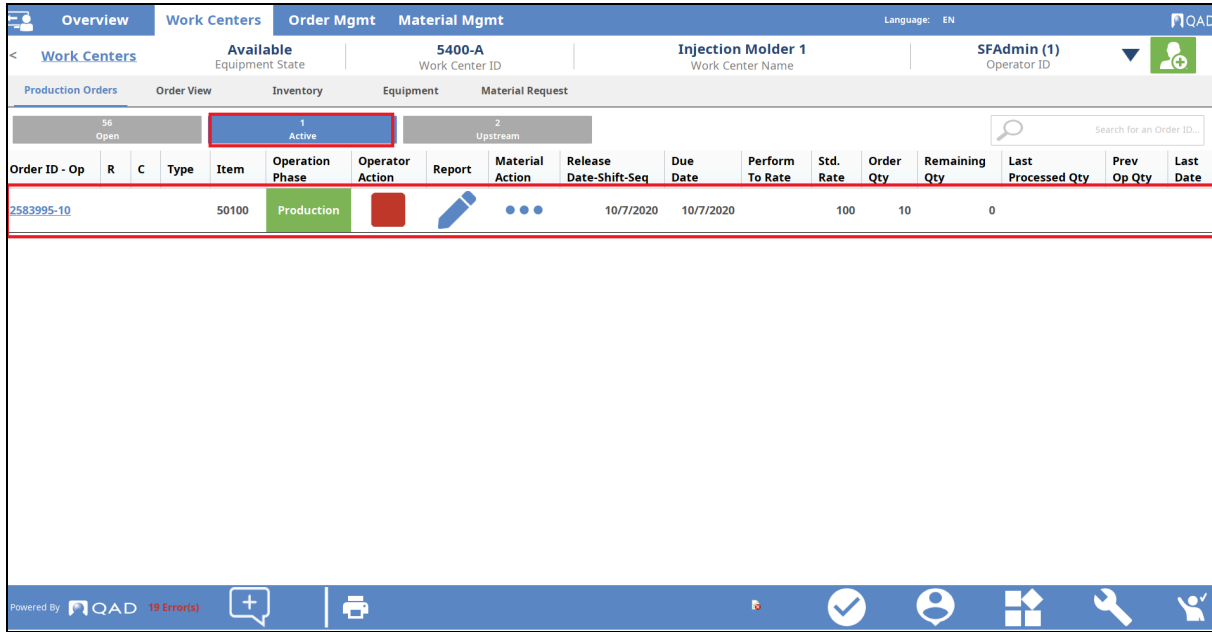
**Example**

Follow these steps to move a work center’s equipment to Downtime and then verify that the production order’s phase changes to Paused:

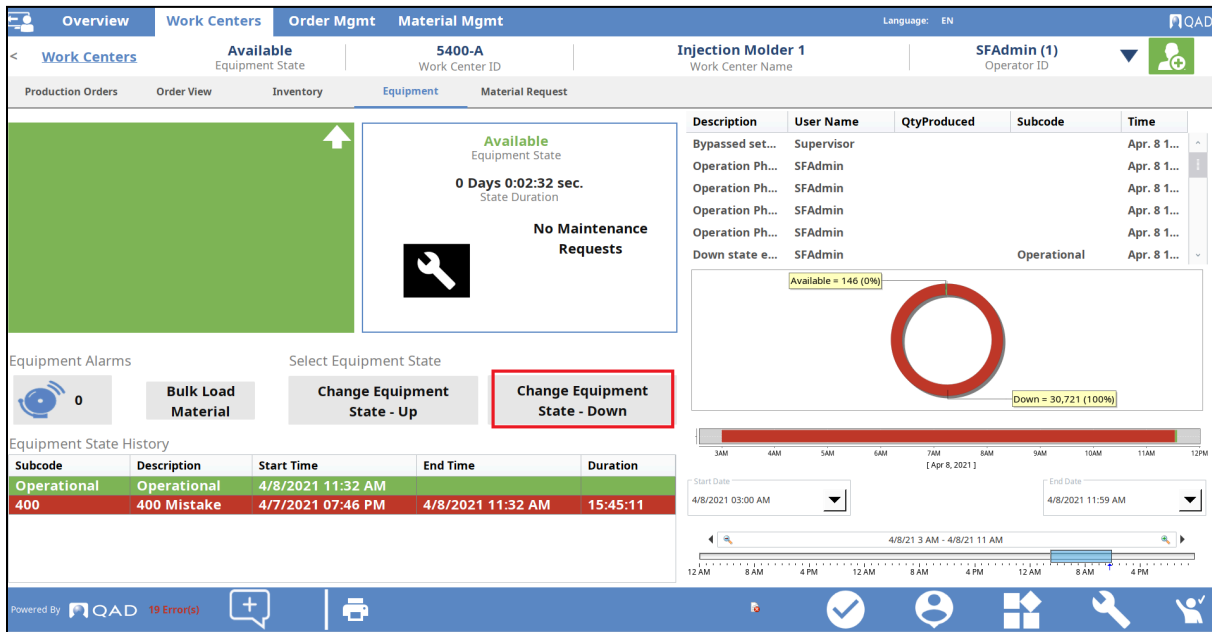
1. In **Production Options** (MachineDownPauseProduction), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587544 (13)	50100 Molded Pin	0.0%	28	Open	Available	Op1	0
5400-B Injection Molder 2		2587567 (8)	50100 Molded Pin	0.0%	13	Open	Available	Op1 (2)	0
5400-C Injection Molder 3		mgw0406b (2)	mgw-fg Testing Finished Good	0.0%	2	Setup	Available	Op1	0
5500-A Assembly Cell 1		2584016 (6)	00100 Pin Assembly - Star	0.0%	8	Open	Available	Op1	0
5500-B Assembly Cell 2		2587542	00101 Pin Assembly - Gear	0.0%	3	Open	Down	Op1	0
5900 Heat Treat				0.0%	0		Available		0

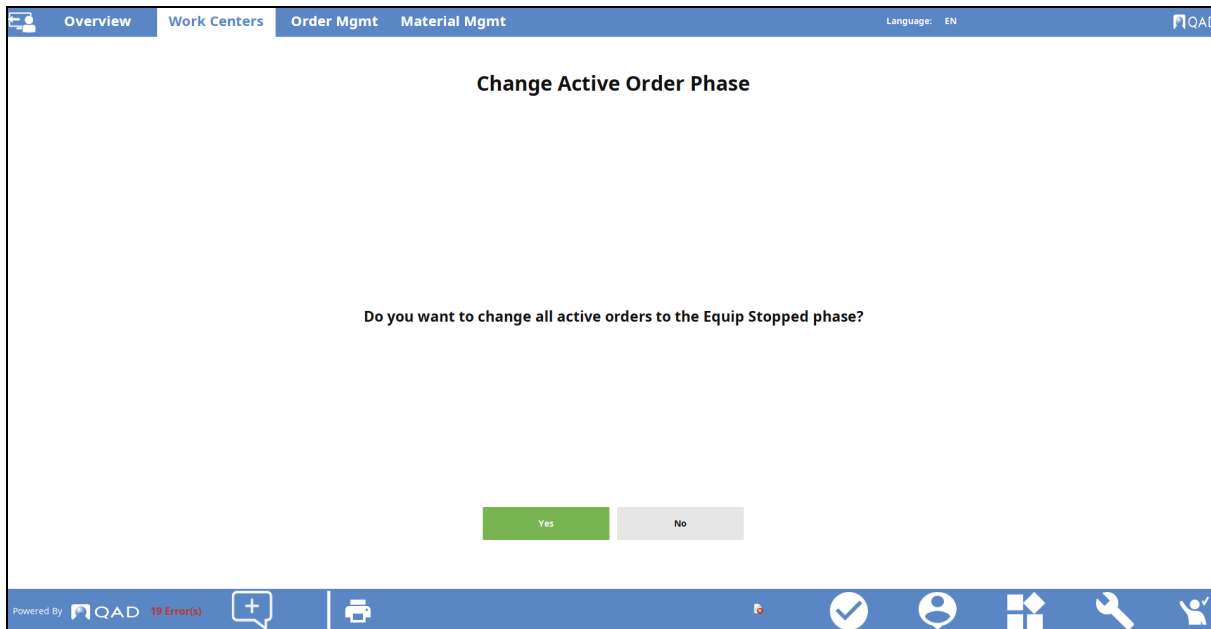
4. Navigate to the Production Orders tab and find production order in the Production (Active) phase.



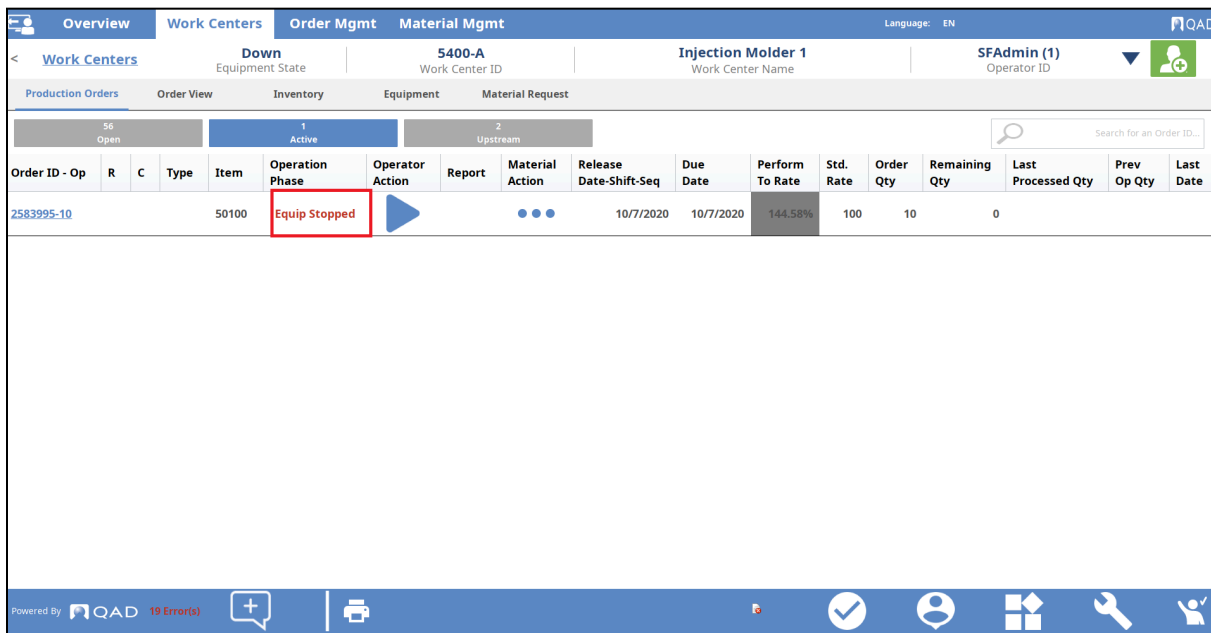
5. Navigate to the Equipment tab and change the equipment state to Downtime.



6. Select Yes to confirm that the active production orders are changed to the Equip Stopped phase.



7. Navigate to the Production Orders > Active Tab and verify the operation phase changed to Stopped.



### Production Order Bottom States

This is an obsolete Production Option. Not in use anymore.

### Performance Rate States

This is an obsolete Production Option. Not in use anymore.

### Phases For Op Assignment (PhasesForOpAssignment)

This is an obsolete Production Option. Not in use anymore.

## Work Center Description

### Purpose

The Work Center Description production option allows the user to specify whether a work center's description is displayed rather than the work center name.

### Where

The production option is applied to any PE screen where the work center name is displayed.

### Setting

Enter the Boolean Value for this option to specify whether a work center's description is displayed rather than the work center name.

- If Boolean =1, then the work center description name is displayed.
- If Boolean = 0, then the work center name is displayed.

### Setup

Field	Setting
Parameter ID	49
Parameter	ShowWorkCenterDescription
Description	Uses the Boolean column to specify whether a Work Center's description will be displayed to the user on screen rather than the name. If true (1) description will show. Default 0.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Show Work Center Description Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option to specify whether a work center's description is displayed rather than the work center name. <ul style="list-style-type: none"> <li>• <b>1.</b> The work center description name is displayed.</li> <li>• <b>0.</b> The work center name is displayed.</li> </ul>

## Example

Follow these steps to verify the work center description or name is displayed:

1. In **Production Options** (ShowWorkCenterDescription), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting and verify that the work center description is displayed.

## Use Generic Document Banner

### Purpose

The Use Generic Document Banner production option allows the user to specify whether the Generic or Standard version of the document banner is displayed. This is based on the QMSItemXref setup.

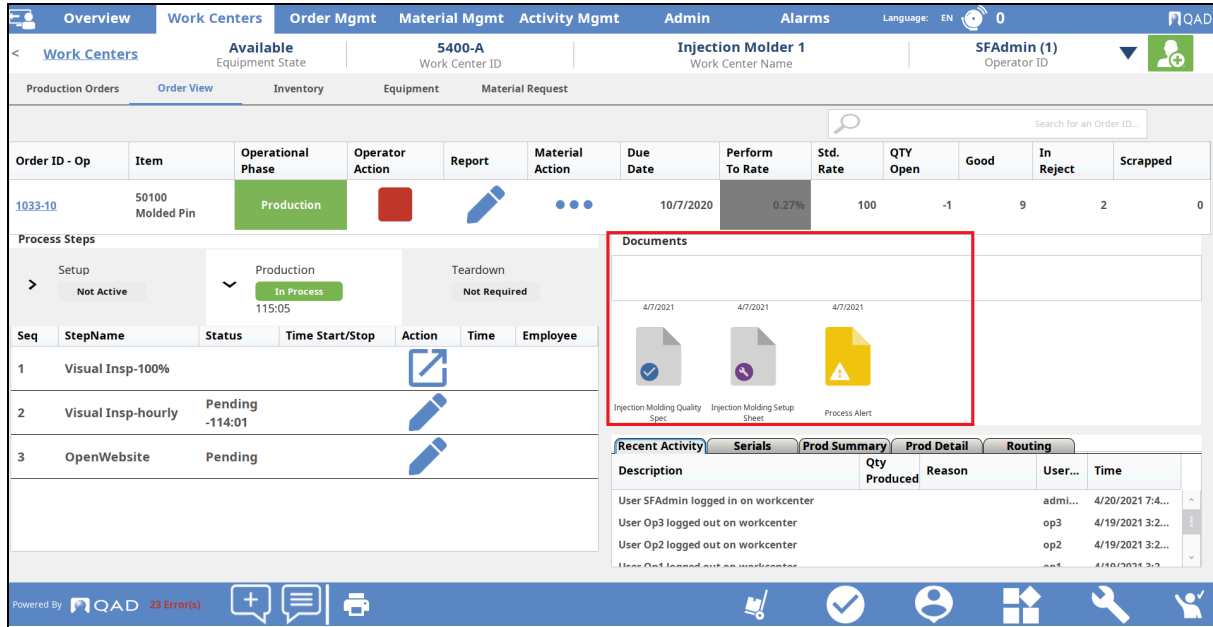
By default, users must build a document banner to display shop floor documents. QMS users have the option to dynamically generate the document banner, based on the documents and document types received from EQMS.

The screenshot displays the QAD PE Administrator interface for setting up a production option. The main area shows the configuration for parameter ID 54, 'UseGenericDocumentBanner', which is set to 'Generic'. The description explains that this option uses a Boolean column to specify whether the generic version of the document banner is shown for relevant parts in QMSItemXref (1 = Generic, 0 = Standard, default: 0). The interface includes a navigation menu on the left, a main settings area, and a table at the bottom for Production Option Settings.

SITE	Work Center	Machine	Role ID	Terminal ID	Reference	Decimal Title	Decimal Value	Boolean Title	Boolean Value	Character
10USA										

### Where

The production option is applied to the Document Banner section on the Order View Layout screen.



### Setting

Enter the Boolean Value for this option to specify if the Generic or Standard version of the document banner is displayed:

- If Boolean =1, then the Generic document banner is displayed.
- If Boolean = 0, then the Standard document banner is displayed. This is the default setting.

### Setup

Field	Setting
Parameter ID	54
Parameter	UseGenericDocumentBanner
Description	Uses the Boolean column to specify whether the generic version of the document banner that shows all documents for the relevant part in QMSItemXref. (1 = Generic, 0 = Standard, default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Use Generic Document Banner Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option to specify if the Generic or Standard version of the document banner is displayed: <ul style="list-style-type: none"> <li>● If Boolean =1, then the Generic document banner is displayed.</li> <li>● If Boolean = 0, then the Standard document banner is displayed. This is the default setting.</li> </ul>

### Example

Follow these steps to navigate to the Order View screen and verify the document banner is displayed correctly:

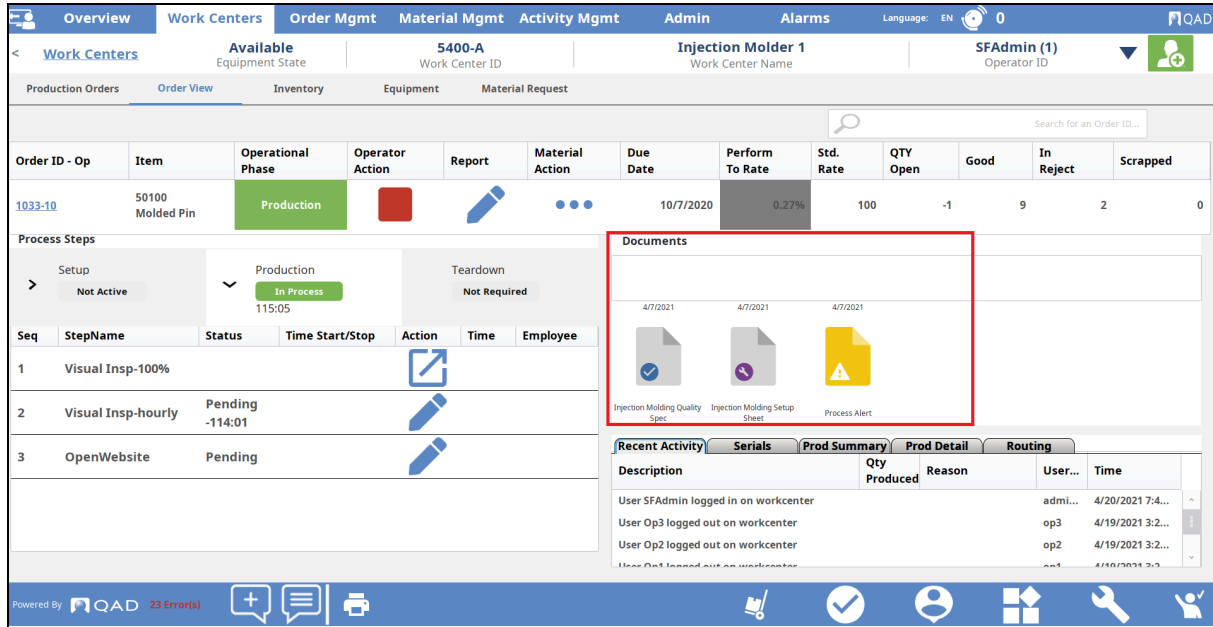
1. In **Production Options** (UseGenericDocumentBanner), enter Boolean Value = 0 (Standard).
2. Log into PE.
3. Navigate to the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (7)	50100 Molded Pin	3.0%		51 Open	Available	Supervisor	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%		30 Open	Available	Supervisor	0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%		10 Open	Available		0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%		16 Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%		6 Open	Available		0
5900 Heat Treat				0.0%		0	Available		0

4. Navigate to the Order View screen for a production order.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2583995-10	●			50100	Production	■	✎	●●●	10/7/2020	10/7/2020	0.27%	100	10	4	1	4/16/2021	
2587532-10				50100	Production	■	✎	●●●	3/1/2021	3/1/2021		100	100	97			
2587544-10				50100	Production	■	✎	●●●	3/10/2021	3/10/2021	0%	100	10	10			
2583996-10				50100	Equip Stopped	▶		●●●	10/9/2020	10/9/2020		100	15	10			
2583998-10				50100	Equip Stopped	▶		●●●	11/5/2020	11/5/2020		100	20	19			
2584019-10				50100	Equip Stopped	▶		●●●	2/18/2021	2/18/2021		100	50	50			
2584022-10	●			50100	Equip Stopped	▶		●●●	2/23/2021	2/23/2021		100	50	38			
2587536-10	●			50100	Equip Stopped	▶		●●●	3/2/2021	3/2/2021	0.08%	100	10	1	2	4/9/2021	
mgw0406b-10	●			mgw-fg	Equip Stopped	▶		●●●	4/6/2021	4/6/2021	0.01%	100	100	97			

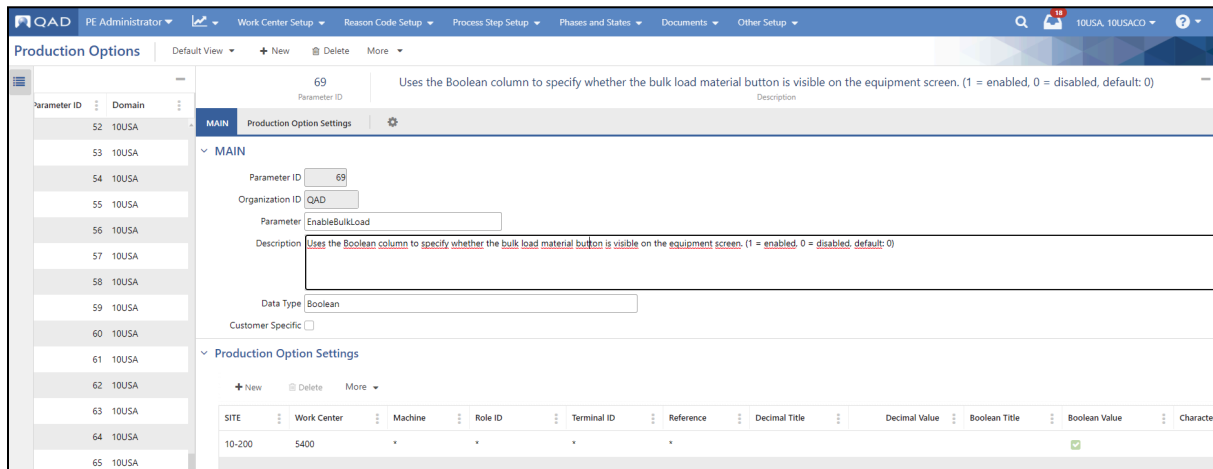
5. Verify that the document banner is displayed in Standard format.



## Enable Bulk Load

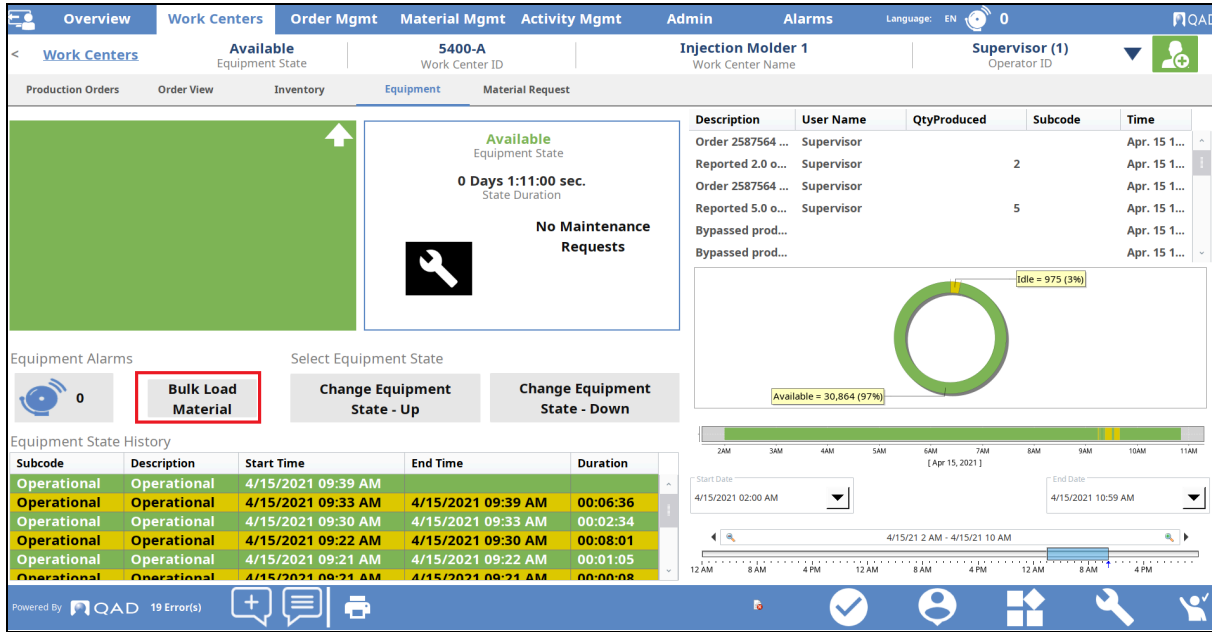
### Purpose

The Enable Bulk Load production option allows the user to specify whether the Bulk Load Material button is accessible on the Equipment screen.



### Where

The production option is applied to the Equipment tab.



**Setting**

Enter the Boolean Value for this option to specify whether the Bulk Load Material button is available on the Equipment screen:

- If Boolean =1, then the Bulk Load Material button is enabled.
- If Boolean = 0, then the Bulk Load Material button is not accessible. This is the default setting.

**Setup**

Field	Setting
Parameter ID	69
Parameter	EnableBulkLoad
Description	Uses the Boolean column to specify whether the bulk load material button is visible on the equipment screen. (1 = enabled, 0 = disabled, default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Enable Bulk Load Option, therefore entering the instructions would be useful.
Boolean Value	Enter the Boolean Value for this option to specify whether the Bulk Load Material button is available on the Equipment screen: <ul style="list-style-type: none"> <li>• If Boolean =1, then the Bulk Load Material button is enabled.</li> <li>• If Boolean = 0, then the Bulk Load Material button is not accessible. This is the default setting.</li> </ul>

**Example**

Follow these steps to navigate to the Equipment Tab and verify if the Bulk Load Material button is accessible:

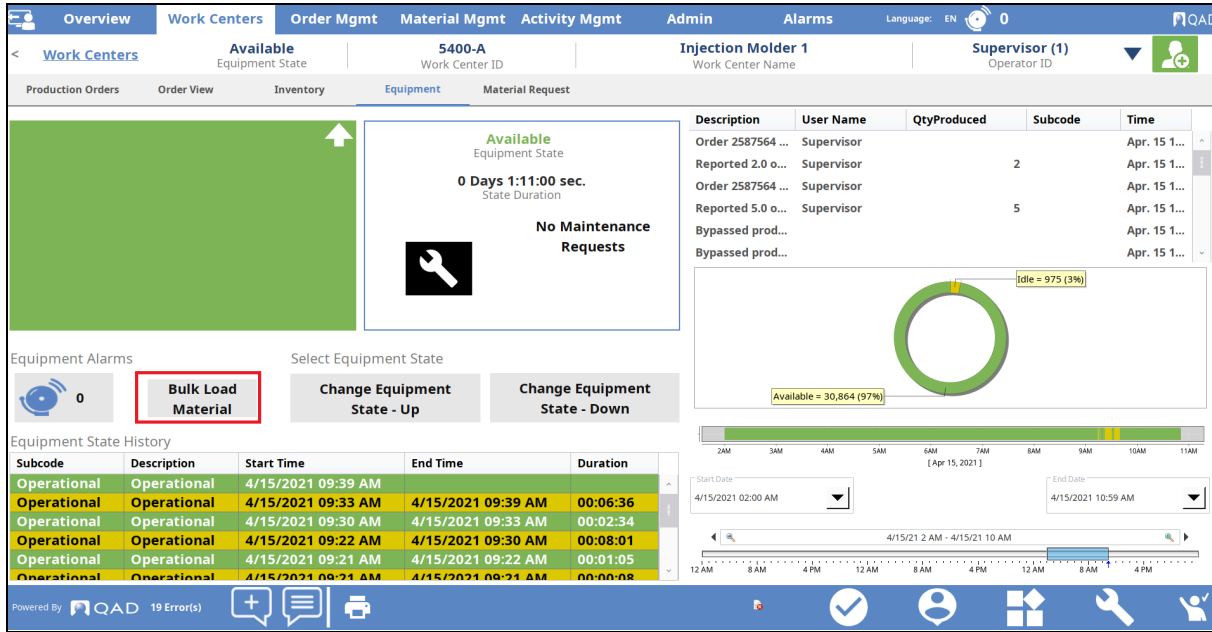
1. In **Production Options** (EnableBulkLoad), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.

Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (10)	50100 Molded Pin	1.0%	52	Open	Available		0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available		0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	11	Open	Available	SFAdmin	0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

4. Navigate to the Equipment tab.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587564-20				50100	Production				3/17/2021	3/31/2021			10	0	2	26	4/15/2021
2583995-10				50100	Equip Stopped				10/7/2020	10/7/2020	144.58%	100	10	0			
2583996-10				50100	Equip Stopped				10/9/2020	10/9/2020		100	15	10			
2583998-10				50100	Equip Stopped				11/5/2020	11/5/2020		100	20	19			
2584019-10				50100	Equip Stopped				2/18/2021	2/18/2021		100	50	50			
2584022-10				50100	Equip Stopped				2/23/2021	2/23/2021		100	50	38			
2587536-10				50100	Equip Stopped				3/2/2021	3/2/2021	0.08%	100	10	1	2		4/9/2021
2587544-10				50100	Equip Stopped				3/10/2021	3/10/2021	0%	100	10	10			
mgw0406b-10				mgw-fg	Equip Stopped				4/6/2021	4/6/2021	0.01%	100	100	97			

5. Verify that the Bulk Load Material button is available and that the user can perform this function.



## Login Category

The following production options are related to how users log into PE.

### Auto Login Screen

#### Purpose

The Auto Login Screen production option allows the user to specify if the docked windows (upper and lower headers) are open or closed after a user logs into PE.

#### Where

The production option is applied to the screen that is displayed after logging into the PE.

#### Setting

Enter the Boolean Value for this option to decide if the docked windows are open or closed after the user logs into PE:

- If Boolean =1, then the docked windows (upper and lower headers appear) are open . This is the default setting.
- If Boolean = 0, then the docked windows are closed.

#### Setup

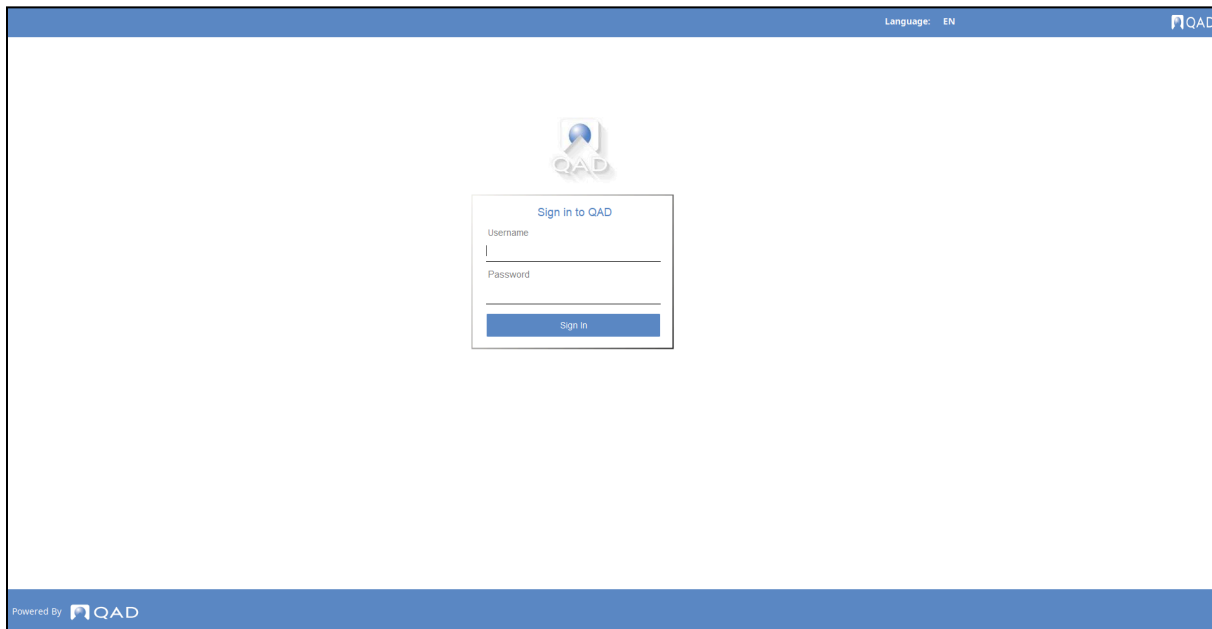
Field	Setting
Parameter ID	50
Parameter	AutoLoginScreen

Description	Uses the Boolean column to specify what screen to open on auto login. The boolean column is used to specify if the docked windows should be closed or not.
Terminal ID (KEY)	Enter the computer name at which the Overview tab style is to be applied for.
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Auto Login Screen Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option to decide if the docked windows are open or closed after the user logs into PE: <ul style="list-style-type: none"> <li>• <b>1.</b> The docked windows (upper and lower headers appear) are open . This is the default setting.</li> <li>• <b>0.</b> The docked windows are closed.</li> </ul>

### Example

Follow these steps to log into PE and verify the docked windows are open or closed:

1. In **Production Options** (AutoLoginScreen), enter Boolean Value = 1.
2. Log into PE.



3. Verify that the docked windows (upper and lower headers) are displayed correctly.

## Shift Login Grace Period

### Purpose

The Shift Login Grace Period production option allows the user to specify the amount of time (in minutes) before the next shift starts that a user is logged into the next shift instead of being logged into the current shift.

### Where

The production option is applied to the Login screen.

**Setting**

Enter the Integer Value for this option which specifies the amount of time (in minutes) before the next shift starts that a user is logged into the next shift instead of being logged into the current shift. For example, if Integer = 10, then if the user logs into PE 10 minutes (or less) before Shift #2 begins, the user is automatically logged into Shift #2 instead of Shift #1 (the current shift).

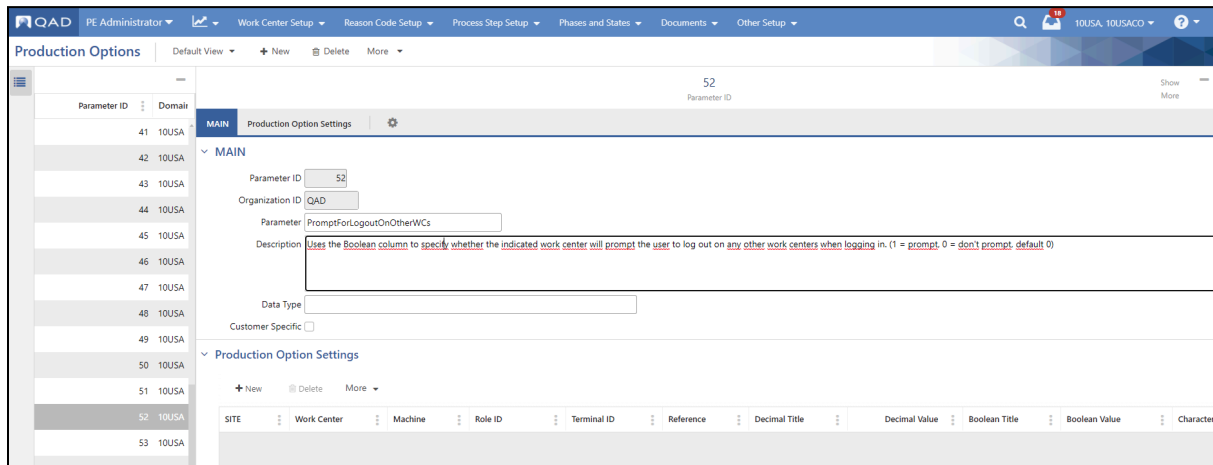
**Setup**

Field	Setting
Parameter ID	39
Parameter	ShiftLoginGracePeriod
Description	Uses the Integer column to specify a number of minutes before the next shift starts that a user will be logged into that shift rather than the current shift for the specified domain/site.
Integer Title	Enter the setup details associated with the Integer Value. For Shift Login Grace Period Option the integer value is critical, therefore entering instruction is useful.
Integer Value	Enter the Integer Value for this option which specifies the amount of time (in minutes) before the next shift starts that a user is logged into the next shift instead of being logged into the current shift. For example, if Integer = 10, then if the user logs into PE 10 minutes (or less) before Shift #2 begins, the user is automatically logged into Shift #2 instead of Shift #1 (the current shift).

**Prompt For Logout On Other WCs**

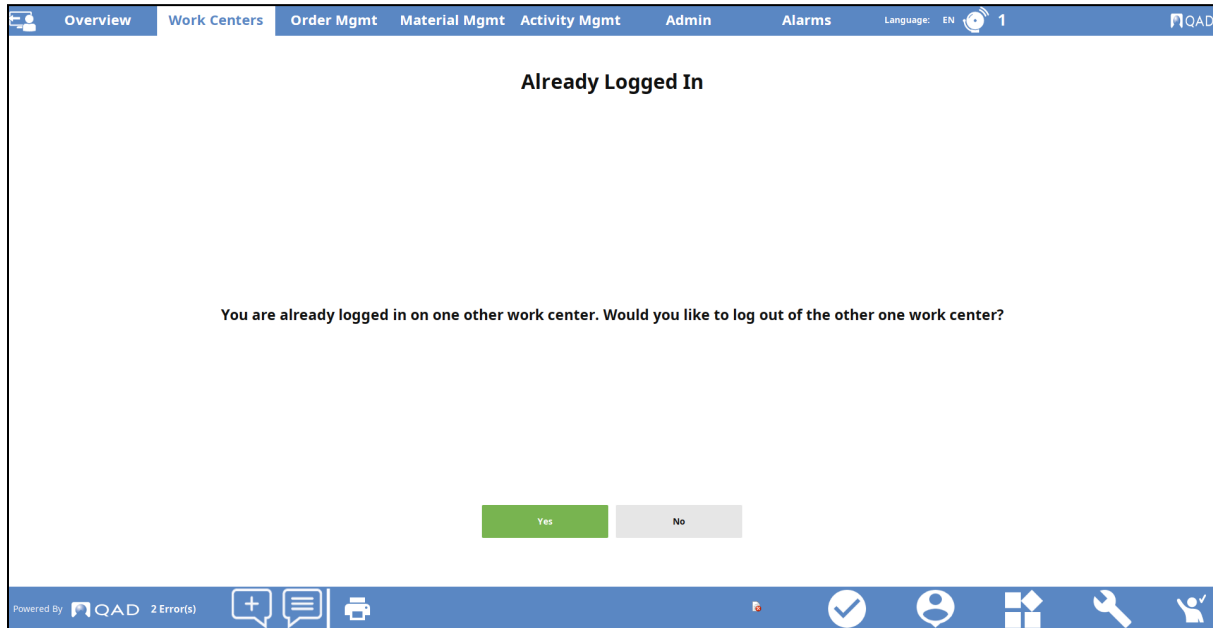
**Purpose**

The Prompt For Logout On Other WCs production option allows the user to specify if a user is logged out of their current work center when they log into a different work center.



**Where**

The production option is applied to the work center login screen.



### Setting

Enter the Boolean Value for this option which specifies if the user is prompted to log out of any other work centers when logging into a new work center:

- If Boolean = 1, the system prompts the user to log out of other work centers.
- If Boolean = 0, the system does NOT prompt the user to log out of other work centers. This is the default setting.

### Setup

Field	Setting
Parameter ID	52
Parameter	PromptForLogoutOnOtherWCs
Description	Uses the Boolean column to specify whether the indicated work center will prompt the user to log out on any other work centers when logging in. (1 = prompt, 0 = don't prompt, default 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Prompt For Logout On Other WCs Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option which specifies if the user is prompted to log out of any other work centers when logging into a new work center: <ul style="list-style-type: none"> <li>• <b>1.</b> The system prompts the user to log out of other work centers.</li> <li>• <b>0.</b> The system does NOT prompt the user to log out of other work centers. This is the default setting.</li> </ul>

### Example

Follow these steps to log into a work center using the same user ID that is already logged into another work center:

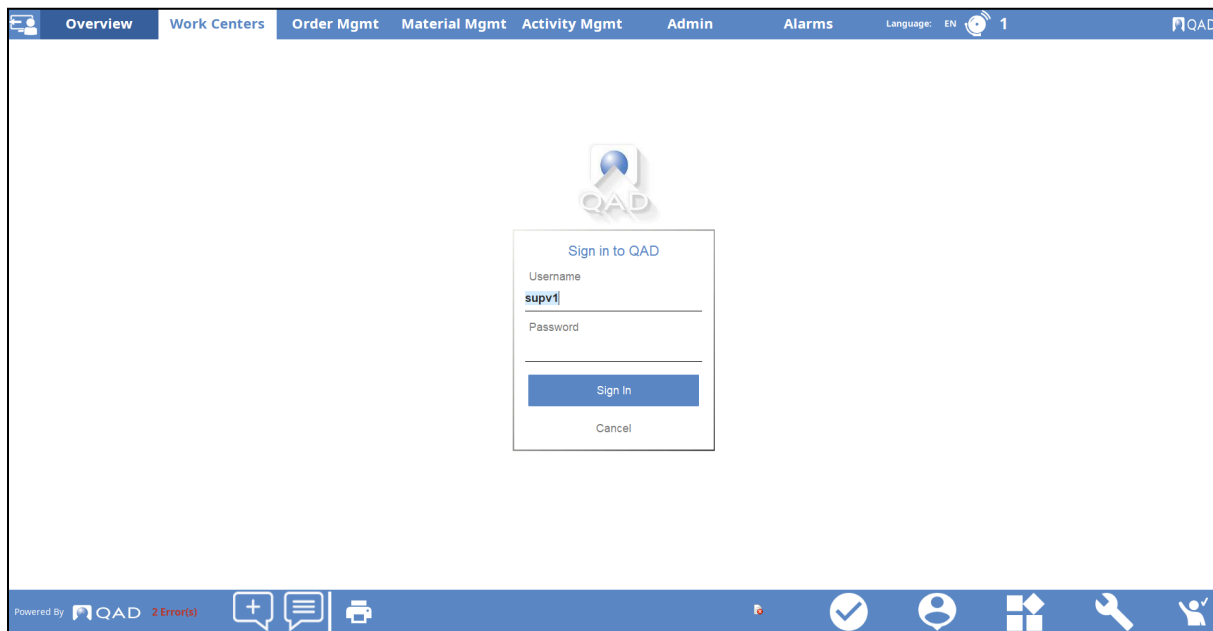
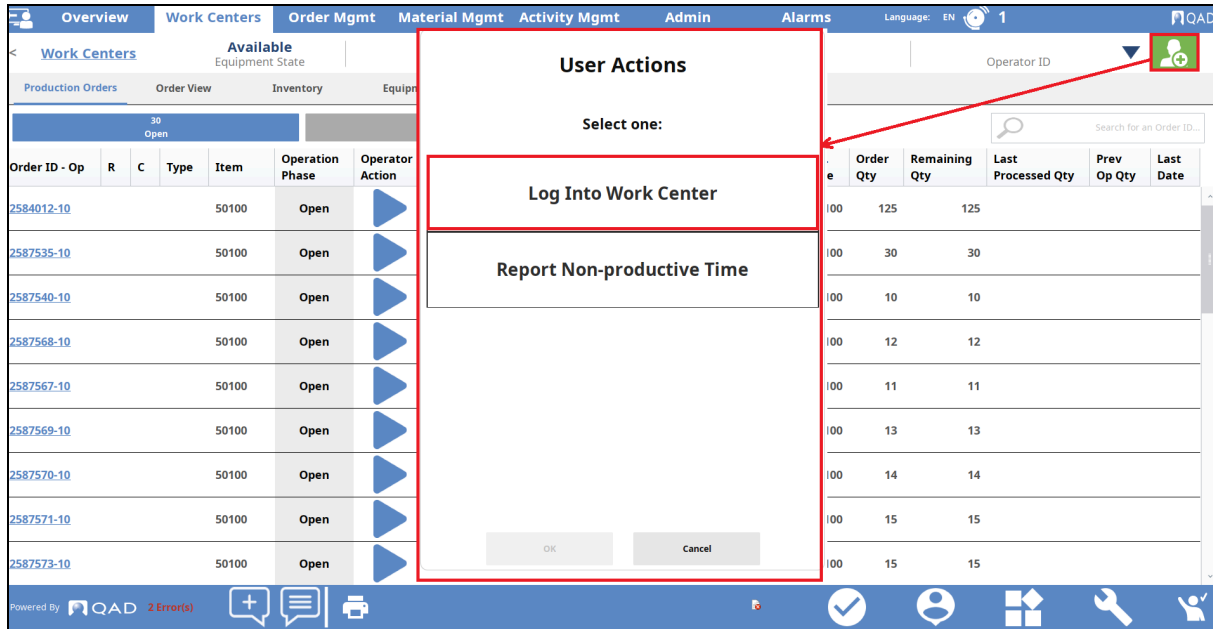
1. In **Production Options** (PromptForLogoutOnOtherWCs), enter Boolean Value = 1.
2. Log into PE.
3. Log into the site against which you applied the setting and navigate to the Work Center tab to view who is currently logged in.

Overview Work Centers Order Mgmt Material Mgmt Activity Mgmt Admin Alarms Language: EN 1 QAD									
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (7)	50100 Molded Pin	3.0%	51	Open	Down	Supervisor	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available		0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	10	Open	Available		0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

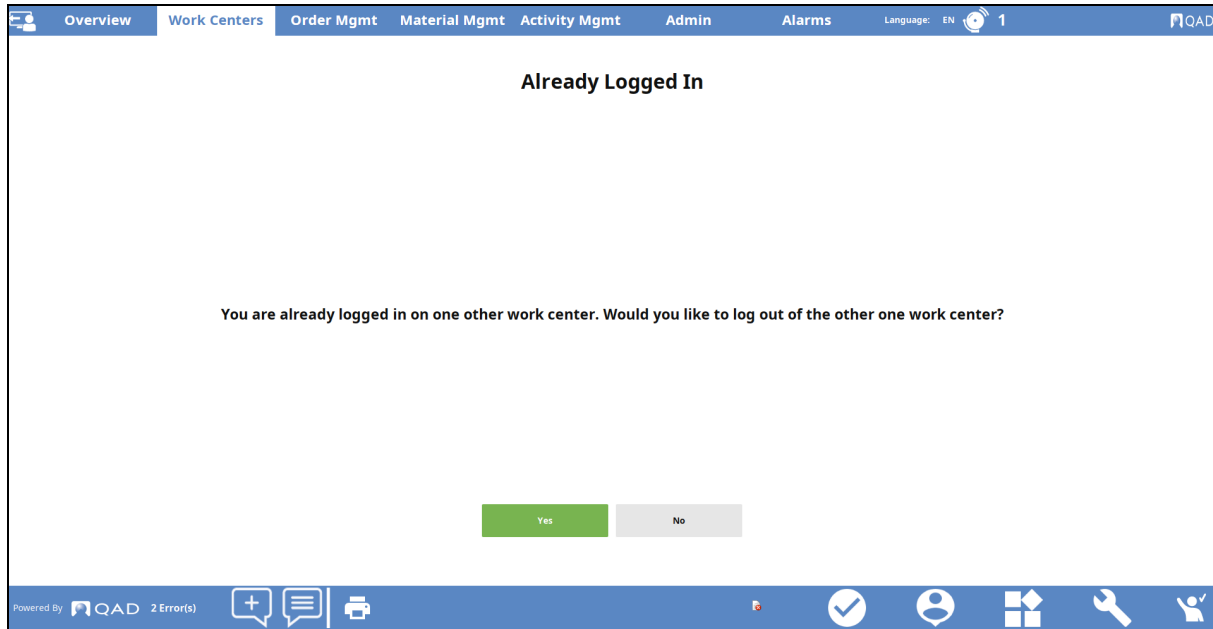
4. Navigate to another work center.

Overview Work Centers Order Mgmt Material Mgmt Activity Mgmt Admin Alarms Language: EN 1 QAD									
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (7)	50100 Molded Pin	3.0%	51	Open	Down	Supervisor	0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available		0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	10	Open	Available		0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available		0
5900 Heat Treat				0.0%	0		Available		0

5. Log into the selected work center using the same user ID that is currently logged in at the other work center.



6. Verify if the system prompts the user to log out of the other work center before logging into the new work center.

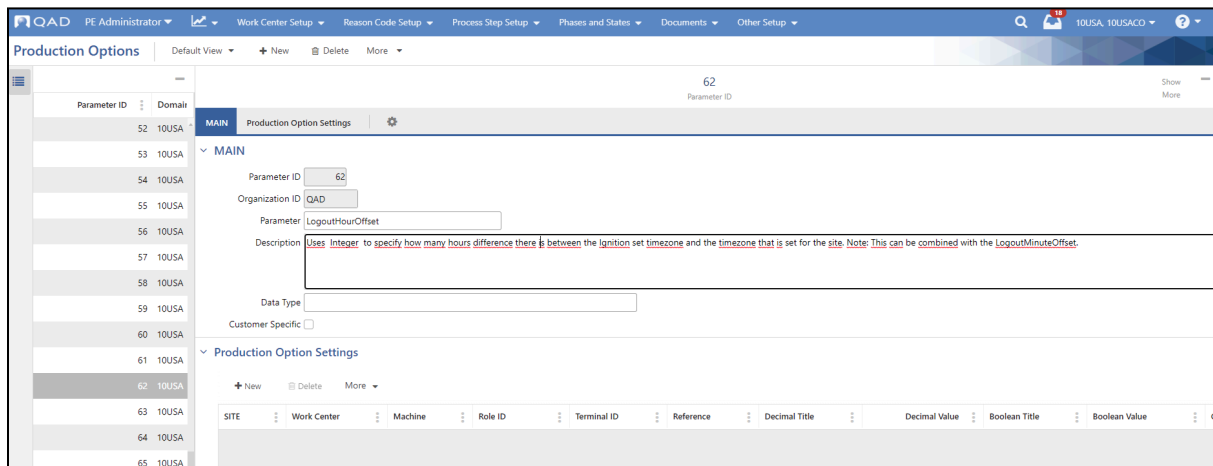


## Logout Hour Offset

### Purpose

The Logout Hour Offset production option allows the user to specify how much time difference (in hours) there is between the timezone set by Ignition and the timezone set for the site.

**Note:** This option can be used in combination with the LogoutMinuteOffset production option.



### Where

The production option is applied to the timestamps on all screens.

### Setting

Enter the Integer Value for this option to specify the time difference (in hours) between the timezone set by Ignition and the time zone that is set up for the site where PE was installed. For example, if the Integer Value = 4, then the difference between the Ignition time zone and the timezone of the local site is 4 hours.

### Setup

Field	Setting
Parameter ID	62
Parameter	LogoutHourOffset
Description	Uses Integer to specify how many hours difference there is between the Ignition set timezone and the timezone that is set for the site. Note: This can be combined with the LogoutMinuteOffset.
Integer Title	Enter the setup details associated with the Integer Value. For Logout Hour Offset Option the integer value is critical, therefore entering instruction is useful.
Integer Value	Enter the Integer Value for this option to specify the time difference (in hours) between the timezone set by Ignition and the time zone that is set up for the site where PE was installed. For example, if the Integer Value = 4, then the difference between the Ignition time zone and the timezone of the local site is 4 hours.

## Logout Minute Offset

### Purpose

The Logout Minute Offset production option allows the user to specify how much time difference (in minutes) there is between the timezone set by Ignition and the timezone set for the site.

**Note:** This option can be used in combination with the LogoutHourOffset production option.

The screenshot shows the QAD PE Administrator interface. The main window displays the 'Production Options' setup for Parameter ID 63. The 'MAIN' tab is active, showing the following details:

- Parameter ID: 63
- Organization ID: QAD
- Parameter: LogoutMinuteOffset
- Description: Uses Integer to specify how many minutes difference there is between the Ignition set timezone and the timezone that is set for the site. Note: This can be combined with the LogoutHourOffset.
- Data Type: (empty field)
- Customer Specific:

Below the main form, there is a section for 'Production Option Settings' with a table header:

SITE	Work Center	Machine	Role ID	Terminal ID	Reference	Decimal Title	Decimal Value	Boolean Title	Boolean Value
------	-------------	---------	---------	-------------	-----------	---------------	---------------	---------------	---------------

### Where

The production option is applied to the timestamps on all screens.

### Setting

Enter the Integer Value for this option to specify the time difference (in minutes) between the timezone set by Ignition and the time zone that is set up for the site where PE was installed. For example, if the Integer Value = 30, then the difference between the Ignition time zone and the timezone of the local site is 30 minutes.

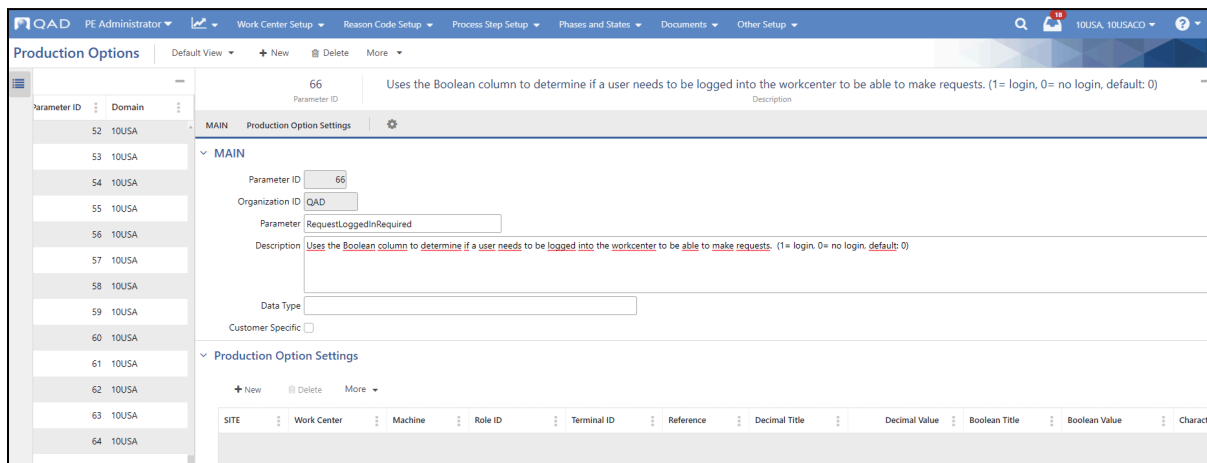
### Setup

Field	Setting
Parameter ID	63
Parameter	LogoutMinuteOffset
Description	Uses Integer to specify how many minutes difference there is between the Ignition set timezone and the timezone that is set for the site. Note: This can be combined with the LogoutHourOffset.
Integer Title	Enter the setup details associated with the Integer Value. For Logout Minute Offset Option the integer value is critical, therefore entering instruction is useful.
Integer Value	Enter the Integer Value for this option to specify the time difference (in minutes) between the timezone set by Ignition and the time zone that is set up for the site where PE was installed. For example, if the Integer Value = 30, then the difference between the Ignition time zone and the timezone of the local site is 30 minutes.

## Request Logged In Required

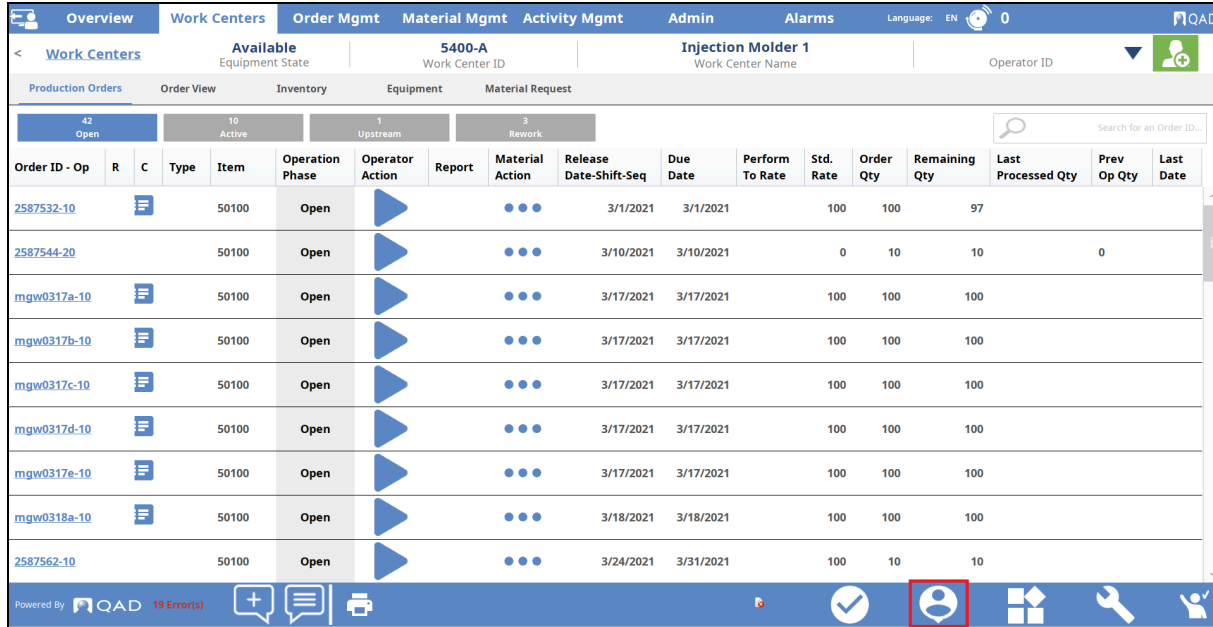
### Purpose

The Request Logged In Required production option allows the user to specify if a user needs to be logged into the work center to make requests from the Request Banner.



### Where

The production option is applied to the Request Banner.



### Setting

Enter the Boolean Value for this option which specifies if a user needs to be logged into the work center to make requests from the Request Banner:

- If Boolean =1, then the user is required to be logged into the work center.
- If Boolean = 0, then the user is NOT required to be logged into the work center. This is the default setting.

### Setup

Field	Setting
Parameter ID	66
Parameter	RequestLoggedInRequired
Description	Uses the Boolean column to determine if a user needs to be logged into the workcenter to be able to make requests. (1= login, 0= no login, default: 0)
Boolean Title	Enter the setup details associated with the Boolean Value. The Boolean value is critical for the Request Logged In Required Option, therefore entering the instructions is useful.
Boolean Value	Enter the Boolean Value for this option which specifies if a user needs to be logged into the work center to make requests from the Request Banner: <ul style="list-style-type: none"> <li>• <b>1</b>. The user is required to be logged into the work center.</li> <li>• <b>0</b>. The user is NOT required to be logged into the work center. This is the default setting.</li> </ul>

### Example

Follow these steps to make a request from the Request Banner while not logged into the work center:

1. In **Production Options** (RequestLoggedInRequired), enter Boolean Value = 1.
2. Log into PE.
3. Log into the work center against which you applied the setting.


Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments
5400-A Injection Molder 1		2587532 (10)	50100 Molded Pin	1.0%		52 Open	Available		0
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%		30 Open	Available		0
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%		11 Open	Available	SFAdmin	0
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%		16 Open	Available		0
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%		6 Open	Available		0
5900 Heat Treat				0.0%		0	Available		0

4. Make sure there are no users logged in at the work center.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587532-10				50100	Open	▶		●●●	3/1/2021	3/1/2021		100	100	97			
2587544-20				50100	Open	▶		●●●	3/10/2021	3/10/2021		0	10	10		0	
mgw0317a-10				50100	Open	▶		●●●	3/17/2021	3/17/2021		100	100	100			
mgw0317b-10				50100	Open	▶		●●●	3/17/2021	3/17/2021		100	100	100			
mgw0317c-10				50100	Open	▶		●●●	3/17/2021	3/17/2021		100	100	100			
mgw0317d-10				50100	Open	▶		●●●	3/17/2021	3/17/2021		100	100	100			
mgw0317e-10				50100	Open	▶		●●●	3/17/2021	3/17/2021		100	100	100			
mgw0318a-10				50100	Open	▶		●●●	3/18/2021	3/18/2021		100	100	100			
2587562-10				50100	Open	▶		●●●	3/24/2021	3/31/2021		100	10	10			

5. Request a supervisor at this work center and verify that the user is prompted to log in before activating the request.

Order ID - Op	R	C	Type	Item	Operation Phase	Operator Action	Report	Material Action	Release Date-Shift-Seq	Due Date	Perform To Rate	Std. Rate	Order Qty	Remaining Qty	Last Processed Qty	Prev Op Qty	Last Date
2587532-10				50100	Open			● ● ●	3/1/2021	3/1/2021		100	100	97			
2587544-20				50100	Open			● ● ●	3/10/2021	3/10/2021		0	10	10		0	
mgw0317a-10				50100	Open			● ● ●	3/17/2021	3/17/2021		100	100	100			
mgw0317b-10				50100	Open			● ● ●	3/17/2021	3/17/2021		100	100	100			
mgw0317c-10				50100	Open			● ● ●	3/17/2021	3/17/2021		100	100	100			
mgw0317d-10				50100	Open			● ● ●	3/17/2021	3/17/2021		100	100	100			
mgw0317e-10				50100	Open			● ● ●	3/17/2021	3/17/2021		100	100	100			
mgw0318a-10				50100	Open			● ● ●	3/18/2021	3/18/2021		100	100	100			
2587562-10				50100	Open			● ● ●	3/24/2021	3/31/2021		100	10	10			



Sign in to QAD

Username  
|\_\_\_\_\_|

Password  
|\_\_\_\_\_|

Sign In

Cancel

## Processing Category

The following production options are related to how the system processes data.

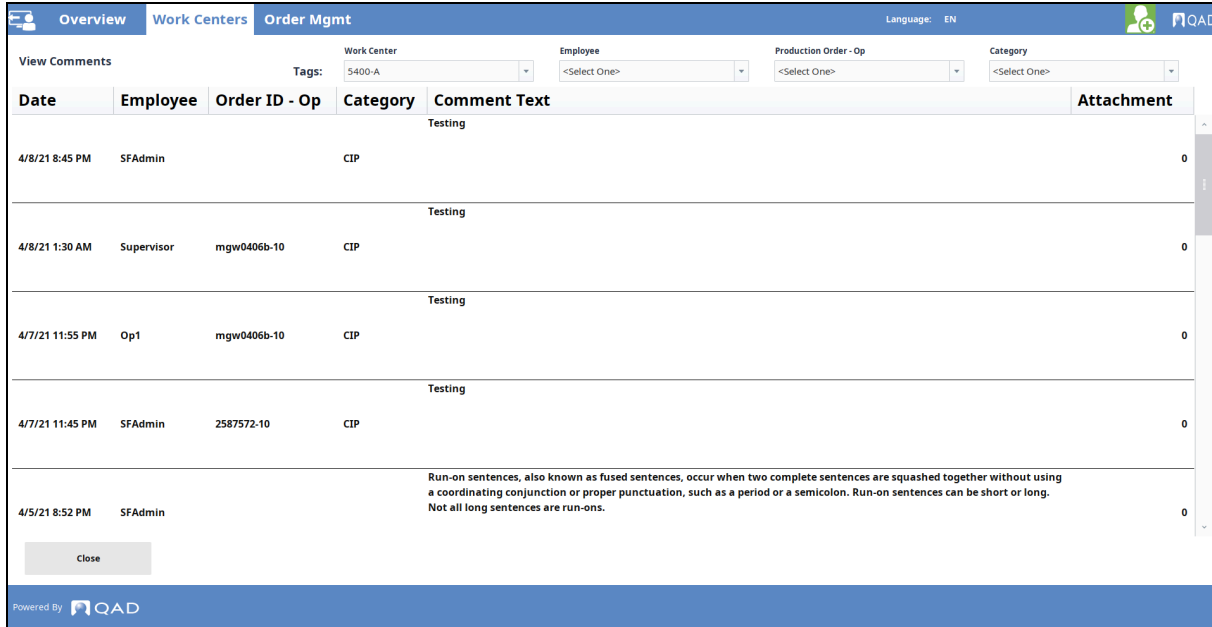
### Stale Comment Age

#### Purpose

The Stale Comment Age production option allows the user to specify the amount of time (in days) when a comment in the Comments screen is considered old and deleted automatically.

#### Where

The production option is applied to the Comments screen.



### Setting

Enter the Integer Value for this option which specifies the amount of time (in days) when a comment in the Comments screen is considered old and deleted automatically. For example, if the Integer Value = 30, then any comments in the Comments screen older than 30 days are automatically deleted from the system.

### Setup

Field	Setting
Parameter ID	41
Parameter	StaleCommentAge
Description	Uses the Integer column to specify the age in days that a comment is considered old to be selected and deleted.
Integer Title	Enter the setup details associated with the Integer Value. For Stale Comment Age Option the integer value is critical, therefore entering instruction is useful.
Integer Value	Enter the Integer Value for this option which specifies the amount of time (in days) when a comment in the Comments screen is considered old and deleted automatically. For example, if the Integer Value = 30, then any comments in the Comments screen older than 30 days are automatically deleted from the system.

### Example

Follow these steps to verify the system deletes comments from the Comments screen that are older than the specified time frame:

1. In **Production Options** (StaleCommentAge), enter Integer Value = 1 (comments are automatically deleted after 1 day).

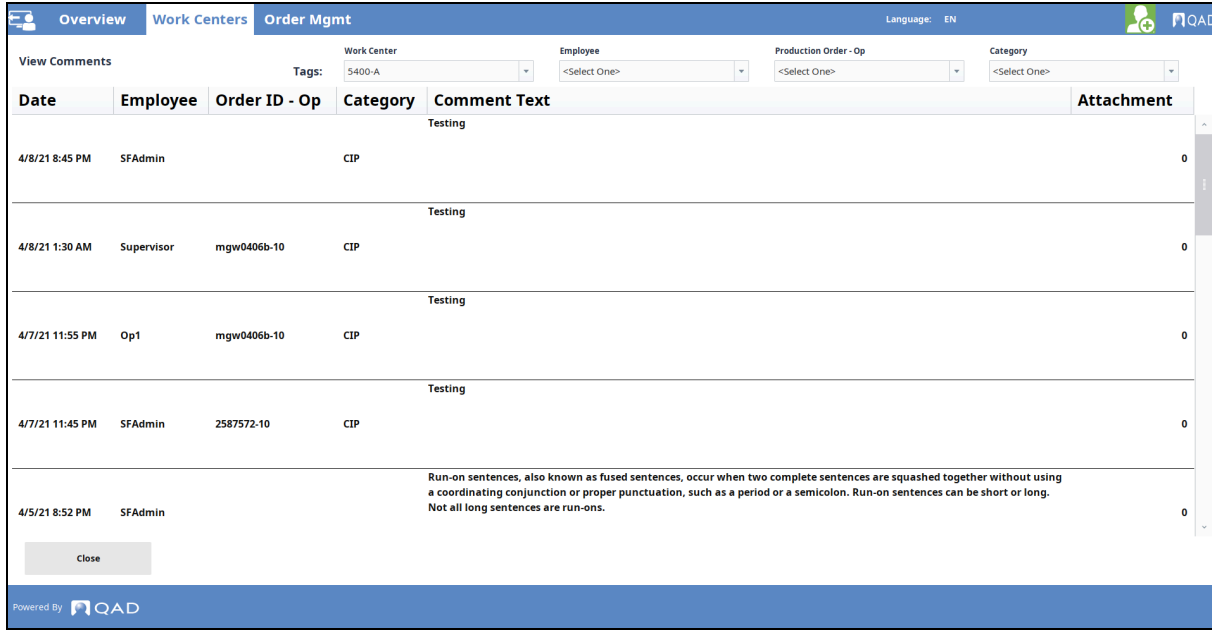
2. Log into PE.
3. Log into the site against which you applied the setting.

Overview		Work Centers		Order Mgmt			Language: EN		QAD	
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments	
5400-A Injection Molder 1		2583996	50100 Molded Pin	33.33%	57	Open	Down	SFAdmin	20	
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available	SFAdmin (3)	1	
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	10	Open	Available	Op1	0	
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available	Op1 (2)	0	
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available	Op1	0	
5900 Heat Treat				0.0%	0		Available		0	

4. Navigate to the Comments section by selecting the Comments column.

Overview		Work Centers		Order Mgmt			Language: EN		QAD	
Work Center	Active Requests	Order ID	Item	% Complete	Assigned Operations	Operation Phase	Equipment State	Logged In User	Comments	
5400-A Injection Molder 1		2583996	50100 Molded Pin	33.33%	57	Open	Down	SFAdmin	20	
5400-B Injection Molder 2		2584012	50100 Molded Pin	0.0%	30	Open	Available	SFAdmin (3)	1	
5400-C Injection Molder 3		mgw0406b	mgw-fg Testing Finished Good	0.0%	10	Open	Available	Op1	0	
5500-A Assembly Cell 1		2584016	00100 Pin Assembly - Star	0.0%	16	Open	Available	Op1 (2)	0	
5500-B Assembly Cell 2		2587539	00101 Pin Assembly - Gear	1.0%	6	Open	Available	Op1	0	
5900 Heat Treat				0.0%	0		Available		0	

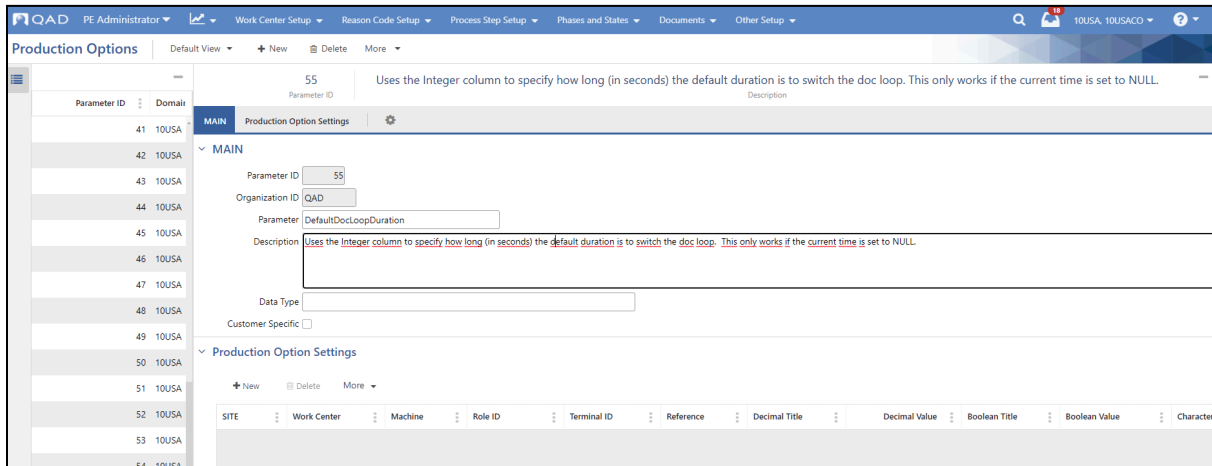
5. Verify that any comments older than 1 day have been deleted.



## Default Doc Loop Duration

### Purpose

The Default Doc Loop Duration production option allows the user to specify the amount of time (in seconds) before the system switches to the next document. This production option only applies to terminals that are set up for Document Looping. For more information, see [Setting up Document Looping on a Terminal](#).



### Where

The production option is applied to any terminal set up for Document Looping.

Issue	Acceptance Criteria	What to look for
FLASHING	Check finished parts to ensure there is no excess material along the edge of parts.	
AIR BUBBLES	Confirm there are no visible air bubbles	
SINK MARKS	Look at areas near thicker features to ensure that there aren't any depressions in adjacent surfaces caused by different rates of cooling.	
WELD LINE	Check for weaker areas where the two flow fronts meet and weld together (usually around holes).	

## Setting

Enter the Integer Value for this option to specify the amount of time (in seconds) before the system switches to the next document. This only applies to terminals set up for Document Looping. For example, if the Integer Value = 30, the documents switch/rotate every 30 seconds.

**Note:** This production option only functions if the current time is set to NULL.

## Setup

Field	Setting
Parameter ID	55
Parameter	DefaultDocLoopDuration
Description	Uses the Integer column to specify how long (in seconds) the default duration is to switch the doc loop. This only works if the current time is set to NULL.
Integer Title	Enter instruction about the setup of the integer value field. For Default Doc Loop Duration Option the integer value is critical, therefore entering instruction can be useful.
Integer Value	Enter the Integer Value for this option to specify the number of seconds for which the doc loop will be switched for. For example, when Integer Value = 10, the documents will switch/rotate every 10 seconds.

## Example

1. In **Production Options** (DefaultDocLoopDuration), enter Boolean Value = 5.
2. Log into PE.
3. Log into the work center against which you applied the setting.
4. On the terminal set up for Document Looping, verify the system switches to the next document every 5 seconds.



# **Administrator Setup in PE**

This chapter discusses the following functions that are performed by a system administrator:

## Administrator Setup Functions

This section covers the functions a system administrator performs when setting up QAD Production Execution.

### Starting PE and Setting up PE Admin Permissions

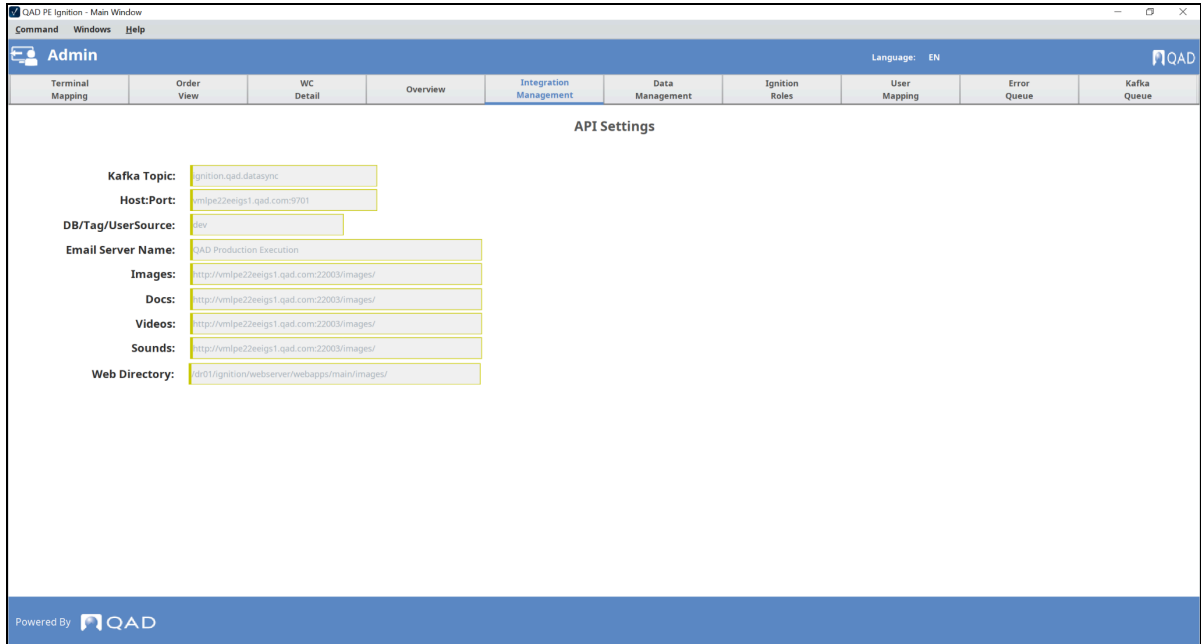
Before the system administrator can set up PE screens, terminals, Overview layouts, and so on, they must perform the following steps:

- Update the Admin > Integration Management screen with the required information.
- Perform a data-sync between PE and QAD Adaptive ERP for users and roles. This step can be performed after setting up the QAD Adaptive ERP base data for Users, Employees, and Roles or after all the ERP base data is set up. This step is required because until the data-sync is performed, there are no users in MariaDB.

Follow these steps to update the Integration Management screen with the required information and to perform a data sync for ERP user and role data:

1. Log in to the Vision Client using the Gateway Admin user ID and password that was created during the PE installation process.
2. Select the Admin > Integration tab and update the fields with the correct data syncing information.

Field	Value
Host: Port	<p>&lt;Nifi Local Hostname&gt;:&lt;PE RestAPI port&gt;</p> <p><b>Note:</b> The &lt;Nifi Local Hostname &gt; variable needs to be replaced with the hostname where the Nifi local package is installed. The &lt;PE RestAPI port&gt; variable needs to be replaced with the PE REST API port value. For more information on the PE REST API, see the <i>QAD Production Execution Installation Guide</i>.</p>
Images	<p>&lt;GatewayURL&gt;/images</p> <p><b>Note:</b> The &lt;Gateway URL&gt; variable needs to be replaced with the Ignition Gateway URL.</p>
Docs	<GatewayURL>/docs
Videos	<GatewayURL>/videos
Sounds	<GatewayURL>/sounds
Web Directory	<p>&lt;Ignition Install Dir&gt;/webserver/webapps/main/</p> <p><b>Note:</b> The &lt;Ignition Install Dir&gt; variable needs to be replaced with the directory where Ignition is installed on the server.</p>



3. Select the Admin > Data Management tab and sync the PE Database with QAD Adaptive ERP user and role data. For more information, see [Data Management](#).
4. Select the Admin > Ignition Roles tab and assign the correct permissions to each role. For more information, see [Define Role Functions](#).
5. Log out of PE and then log back in as the PE Administrator (SFAdmin) and complete the setup for screens, terminals, and so on.

## Downloading Data from QAD Adaptive ERP to PE

This section explains how to ensure the PE related data and settings from QAD Adaptive ERP are imported into PE. Downloading and syncing QAD Adaptive ERP data into PE must be performed by a system administrator. It is expected this process is performed periodically during the implementation phase and when then the customer project approaches Go-Live. It is likely to be coordinated during the Cut-Over Phase of the project. It is also expected that the system administrator may periodically sync the QAD Adaptive ERP and PE data after PE is successfully implemented. Some examples include:

- When modifications are made to work centers
- When employee headcount changes
- When additional reason codes and subcodes are added or modified.

In addition to understanding the process required to bring data into PE, it is also suggested that the system administrator understands the PE browses. When there are data issues within PE, the PE browses in QAD Adaptive ERP are the first place to investigate while troubleshooting. The management of this function can be done by opening the **Browse Definitions** screen in QAD Adaptive ERP and searching for the correct PE browse.

The following table lists the browses that provide data that is used in PE. For more information, see [Data Management](#).

Browse	Message Type	Purpose
mg225	Domain	Provides a list of all active domains in the current database.
gp348	Site	Provides a list of the sites defined in the current database.
sf014	Work Center	Provides a list of all work centers defined in the current database.
sf007	EDL	This is a dynamic browse that provides an updated status of the active production orders and the work centers where the work is being performed.
sf018	Shift	Contains shift calendar data that defines daily schedules for each process item.
pa019	BOP	Contains packaging structure data that determines the way goods are packaged and stored.
sf021	Line Items	Provides a list of the defined production lines and the specific items which are built on those lines. This is to support repetitive functionality, including scheduled and cumulative orders.
sf013	Inventory Browse	Contains location inventory detail for PE.
gp224	Reason Code	Contains reason codes that are used to categorize and describe different transactions and events. PE provides an additional frame to this QAD Adaptive ERP screen, which allows users to set up reason subcodes that give a more detailed explanation and analysis.
sf010	Employee	Contains employee ID records that are to be used in PE.
sf008	Role	Contains shop floor roles that are to be used in PE.
sf009	User Mapping	Provides the link between users and their associated roles.
sf012	Department	Contains a list of the departments defined in the database.
sf019	Pack Code	Contains pack code data that defines the way items and inventory are packaged and stored.
pa003	Item Pack	Contains item packaging data that indicates the packaging hierarchy for each specific item.

## Browse Definitions

Use **Browse Definitions** in QAD Adaptive ERP to identify the data that is expected to be sent from QAD Adaptive ERP to PE. The fields, filters and supporting programs found in each browse have been configured to supply critical data. It is recommended that you do not modify these browses in any way.

Use the filters to find the desired browse. The corresponding browses are linked so you can click the Browse Name or Definition and open that browse directly from this screen. The data that is displayed in the associated browse is the same data that is in the PE database, assuming there are no active issues with integration.

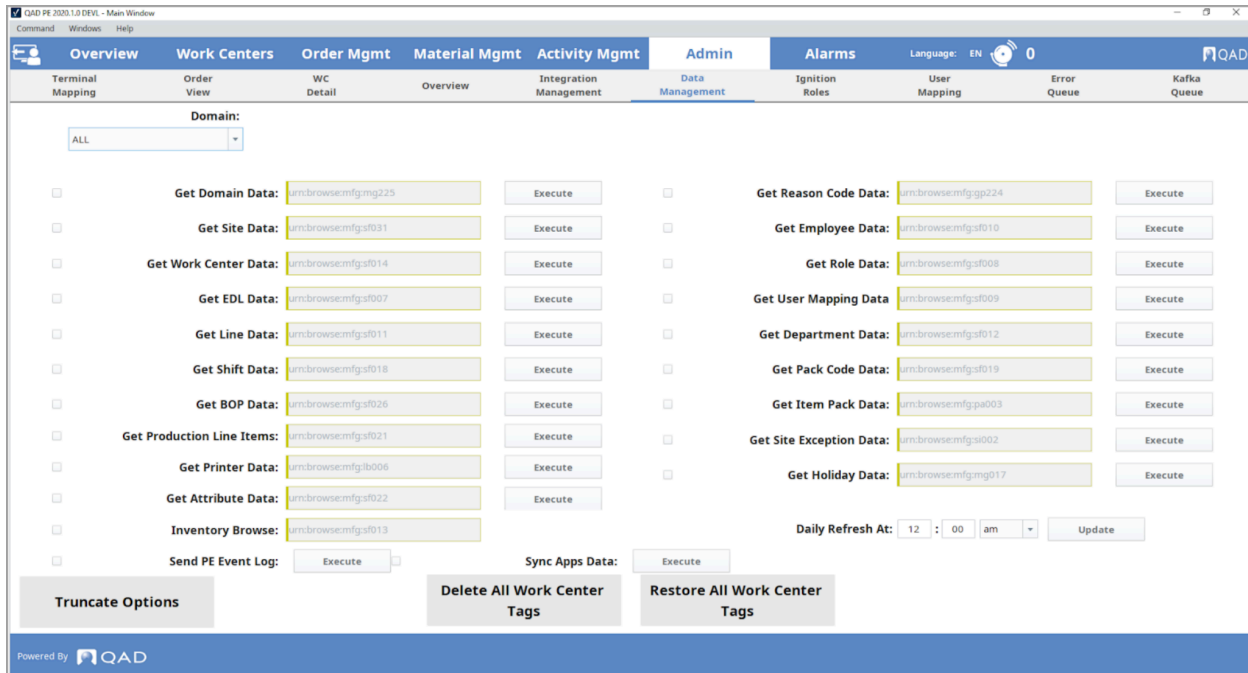
Browse Name	Description	View	.NET UI Menu	Power	Lookup	Drill Down	Menu Item	Calling Procedure	Tables	Sort Columns	User ID	Mod Date
s1001	Operation Transacti...	__wstf001	Yes	Yes	No	No	16.13.18		op_hist wo_mstr pt...		demo	5/2/...
s1002	Production Order C...	__wstf002	Yes	Yes	No	No	16.13.90.1.2		wod_det wo_mstr pt...		mfg	2/...
s1003	Non-Conforming Tr...	__wstf003	Yes	Yes	No	No	16.13.20.45		wr_route pt_mstr w...		demo	1/...
s1004	Reject	__wstf004	Yes	Yes	No	No	16.13.20.47		op_hist		demo	1/...
s1005	Rework	__wstf005	Yes	Yes	No	No	16.13.20.48		op_hist		demo	1/...
s1006	Scrap	__wstf006	Yes	Yes	No	No	16.13.20.46		op_hist pt_mstr		demo	1/...
s1007	Component Chk by...	__wstf007	Yes	Yes	No	No	16.13.90.1.7		dom_mstr In_mstr w...		mfg	2/...
s1008	Roles	__wstf008	Yes	Yes	Yes	Yes	16.13.90.1.8		Role Domains		qadvm	12/...
s1009	SF099	__wstf009	Yes	Yes	Yes	No	16.13.90.1.9		emp_mstr Employee...		mfg	4/1/...
s1010	Employees	__wstf010	Yes	Yes	Yes	No	16.13.90.1.10		emp_mstr		QAD	4/1/...
s1011	Production Line	__wstf011	Yes	Yes	Yes	No	16.13.90.1.11		In_mstr		demo	1/...
s1012	Department Master	__wstf012	Yes	Yes	Yes	No	16.13.90.1.12		dpt_mstr		QAD	1/...
s1013	Inventory Details	__wstf013	Yes	Yes	Yes	No	16.13.90.1.13	s1013			mfg	5/1/...

ID #1	Parent Item	Order Status	Backflush Location	Component Status	Work Center	Machine	Release Date	Due Date	Shift	Sequence	Quantity Ordered
mgw0525a	50100	R	WS400A	Available	5400	A	5/25/2022	5/25/2022			100.0
mgw0526a	50100	R	WS400B	Available	5400	B	5/26/2022	5/26/2022			100.0
mgw0526b	00100	R	WS500A	Shortage	5500	A	5/26/2022	5/26/2022			100.0
mgw0526b	00100	R	WS500A	Shortage	5500	A	5/26/2022	5/26/2022			100.0
mgw0526b	00100	R	WS600S	Shortage	5600	S	5/26/2022	5/26/2022			100.0
mgw0526c	50100	R	WS400A	Available	5400	A	5/26/2022	5/26/2022			100.0
mgw0526d	50100	R	WS400A	Available	5400	A	5/26/2022	5/26/2022			100.0
mgw0526e	50100	R	WS400A	Available	5400	A	5/26/2022	5/26/2022			100.0
mgw0526v	50100	R	WS400A	Available	5400	A	5/26/2022	5/26/2022			100.0

## Data Management

In PE, the Admin > Data Management tab provides system administrators the essential functions to manage PE. In the Data Management tab, administrators can:

- Refresh the PE database with updated data from QAD Adaptive ERP browses. This can be performed for specific PE datasets or all PE datasets at once and for specific domains or all domains at once.
- Configure PE to refresh PE datasets on a set schedule, such as each day at a specific time.
- Force refresh all PE datasets with QAD Adaptive ERP at once.
- Force send the PE Event Log data to the PE Events table in QAD Adaptive ERP.
- Delete and restore work center tags.
- Truncate tables within the PE MariaDB. This function is recommended for experts only.



## Data Management Fields and Buttons

*Domain.* Specify if you want to refresh the datasets for a specific domain or for all domains.

*Send PE Event Log.* Click Execute to force send any new PE Event log records to the Production Execution Events browse in QAD Adaptive ERP.

*Sync Apps Data.* Click the Execute button to import all the data that was entered in the PE screens in QAD Adaptive ERP into the PE platform.

**Note:** This option is different from the Get Data Execute buttons. The Get Data Execute buttons refresh the PE screens in QAD Adaptive ERP with updated QAD Adaptive ERP data. The Sync Apps Data button refreshes PE with updated data from the PE screens in QAD Adaptive ERP.

*Daily Refresh At.* Specify the time of day the system syncs the QAD Adaptive ERP and PE data. To refresh specific datasets, select the associated check boxes. To refresh all datasets, make sure to select all check boxes. After entering the daily refresh time, click Update to save the daily refresh schedule.

*Truncate Options.* Click this button to open the Truncate Options screen, which allows you to truncate specific PE tables. The truncating option deletes the existing records from the MariaDB table.

**Note:** This should only be performed by an experienced system administrator. For more information, see [Using the Truncate Option to Delete Data from MariaDB Tables](#).

*Delete All Work Center Tags.* Click this button to delete and clean up the work center tag data in PE. This option is used when setting up and adding new work centers in QAD Adaptive ERP.

**Note:** The Delete/Restore All Work Center Tags buttons should only be used when setting up and adding work centers in QAD Adaptive ERP. Use these buttons to ensure

that all necessary work center tags in PE are updated with the current tags from QAD Adaptive ERP. For more information, see [Deleting and Restoring Work Center Tags](#).

*Restore All Work Center Tags.* Click this button to import the updated work center tag data from QAD Adaptive ERP into PE. This option is used when setting up and adding new work centers in QAD Adaptive ERP.

**Note:** The Delete/Restore All Work Center Tags buttons should only be used when setting up and adding work centers in QAD Adaptive ERP. Use these buttons to ensure that all necessary work center tags in PE are updated with the current tags from QAD Adaptive ERP. For more information, see [Deleting and Restoring Work Center Tags](#).

### Get Data Fields.

The Get Data fields display the QAD Adaptive ERP browses, which contain the master data that will be imported into PE. When the associated Execute button is clicked, the PE dataset is refreshed with the updated data from the QAD Adaptive ERP browse. Use **Browse Definitions** to identify and view the browses that are displayed in each field. For more information, see [Browse Definitions](#).

*Get Domain Data.* Displays the **Domain** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Site Data.* Displays the **Sites** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Work Center Data.* Displays the **Work Centers** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get EDL Data.* Displays the **Component Chk by Order/Work Center** custom browse that is used to gather the necessary production order data that is imported into PE as an Electronic Dispatch List (EDL). Select Execute to import the data into PE.

*Get Line Data.* Displays the **Production Lines** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Shift Data.* Displays the **SHIFT\_CALENDAR** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get BOP Data.* Displays the **Item Packaging** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Production Line Items Data.* Displays the **ITEM PRODUCTION LINE DATA** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Printer Data.* Displays the **Label Printer Browse** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Attribute Data.* Displays the **PE\_Attribute\_Profile** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Inventory Browse.* Displays the **Inventory Details** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Reason Code Data.* Displays the **Reason Codes** browse containing QAD Adaptive ERP data

that is imported. Select Execute to import the data into PE.

*Get Employee Data.* Displays the **Employees** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Role Data.* Displays the **Roles** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get User Mapping Data.* Displays the **User Access** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Department Data.* Displays the **Departments** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Pack Code Data.* Displays the **Pack Code** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Item Pack Data.* Displays the **Item/BOM Code** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Site Exception Data.* Displays the **Site Calendar Exceptions** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

*Get Holiday Data.* Displays the **Holidays** browse containing QAD Adaptive ERP data that is imported. Select Execute to import the data into PE.

## Refreshing PE Database with QAD Adaptive ERP Data

Follow these steps to refresh the PE database with updated data from QAD Adaptive ERP browses:

1. In the Admin > Data Management tab, specify which domains will be updated. To update all domains set the Domain field to All; otherwise, select the specific domain.
2. Refresh the PE dataset with updated QAD Adaptive ERP data by clicking the associated Execute button.
3. After clicking the Execute button, there is a 5 minute delay before you can click it again.

## Configuring PE to Refresh QAD Adaptive ERP Data Daily

Follow these steps to configure PE to automatically refresh PE datasets each day at a specific time:

1. In the Admin > Data Management screen, select which datasets are refreshed daily by selecting the associated check boxes. To refresh all datasets, make sure to select all the check boxes.
2. Enter the daily refresh time in the Daily Refresh At field.
3. Click Update to save the daily refresh schedule.
4. The selected PE datasets will now be refreshed daily at the specified time.

## Deleting and Restoring Work Center Tags

When setting up or adding work centers for the first time, use the Delete/Restore All Work Center Tags options to ensure that all the necessary work center tags in PE are updated with the current tags from

## QAD Adaptive ERP.

Follow these steps to refresh PE work center tags with updated work center tags from QAD Adaptive ERP:

1. Add the new work centers in QAD Adaptive ERP. For more information, see [Work Center Setup](#).
2. From the Data Management tab, click the PE Apps Sync Execute button. This option imports all the data that was entered in the PE Apps screens into the PE platform.
3. Click the Delete All Work Center Tags button to delete the work center tag data in PE.
4. Click the Restore Work Center Tags button to import the updated work center tag data from QAD Adaptive ERP into PE.
5. The work center data in PE is now refreshed and reflects the updated work center data in QAD Adaptive ERP.

## Using the Truncate Option to Delete Data from MariaDB Tables

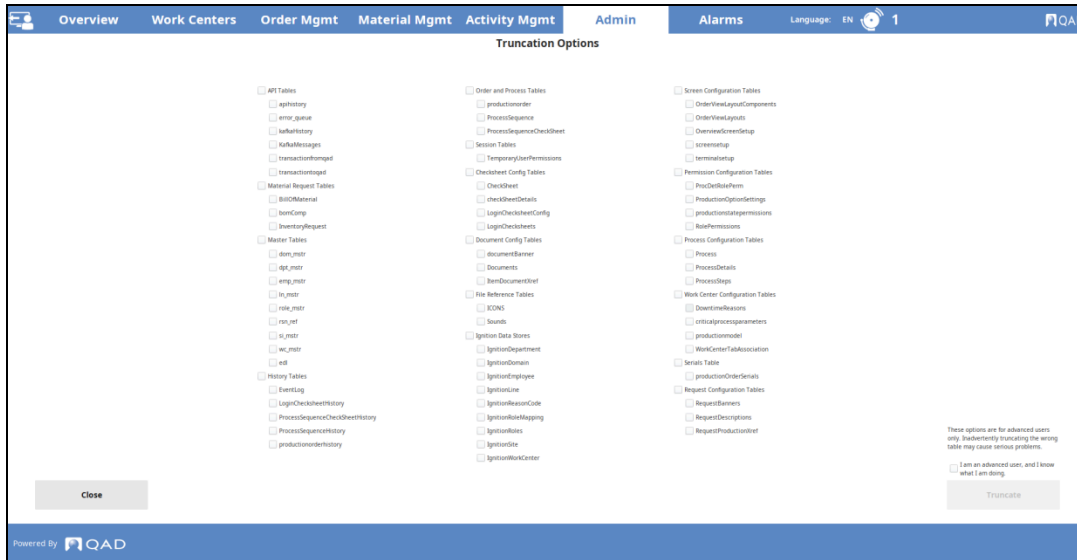
In the Admin > Data Management screen, use the Truncate Option to delete all data from the selected MariaDB tables.

**Important:** The Screen Configuration Tables should **never** be cleared/truncated.

**Important:** Only experienced system administrators should perform this procedure. It is recommended that the Truncate Option only be used in Dev or Test environments and not in Production. For example, if this is a brand new Dev or Test environment that requires no demo data, an administrator could run the Truncate Option to clear the PE database tables from any unwanted data.

Follow these steps to use the Truncate Option to delete data from selected MariaDB tables:

1. From the Data Management tab, click the Truncate Options button. The Truncate Options screen opens.
2. Specify which MariaDB table data will be deleted by selecting the check boxes.
3. Select the check box indicating that you are an advanced user and you know what you are doing.
4. Click the Truncate button.
5. After truncating the tables, click the associated Get Data Execute buttons to refresh the PE database with updated data from QAD Adaptive ERP browses. For more information, see [Refreshing PE Database with ERP Data](#).



## Work Center Configuration

**Note:** Setting up and configuring work centers in PE must be done **after** setting up work centers in QAD Adaptive ERP so that the work center data is correctly displayed in the WC Detail drop down list. For more information about setting up work centers in QAD Adaptive ERP, see [Work Center Setup](#).

Use the Admin > WC Detail tab to set up and configure work centers in PE. In the WC Detail tab, you can:

- Specify which tabs are displayed at a work center, such as the Equipment or Inventory tabs.
- Link a work center to a specific production line.
- Indicate that a work center reports production based on item numbers, rather than production order IDs.

Each work center that interacts with PE needs to be set up and configured in the WC Detail tab. Each work center set up in this screen can be added to layouts in the Terminal Mapping screen.

After configuring a work center, click Save to confirm the setup for that work center. Repeat this process until each unique work center has been correctly set up and configured.

After setting up each work center in the WC Detail tab, go to the Admin > Data Management tab and delete and restore the work center tags. For more information, see [Deleting and Restoring Work Center Tags](#).

Once the work center tags are restored, the Work Center Configuration exists in the PE database but it is not visible. To make the work center display in PE, the work centers must be mapped to a specific computer/terminal. For more information, see [Terminal Mapping Setup](#).

Site	Work Center Desc	Work Center	Machine
10-200	General Assembly	1000	
10-200	General Assembly-Ultra	1000	1001
10-200	Motor Assembly Alt 2	1000A2	1
10-200	Electrical Assembly	1010	
10-200	Electrical Test	1040	
10-200	Pack	1060	
10-200	Packaging -Ultra	1060	1001
10-200	51-100T Secondary Press	2024	
10-200	Roll Mill 1	2040	
10-200	Roll Form 1	2060	

Site	Work Center Desc	Work Center	Machine
1000A2			

*Domain Name.* Select the domain associated with the work center.

*Site Name.* Select the site associated with the domain and work center.

*Work Center Name.* Select the work center/machine to configure. Only work centers associated with the domain and site combination are displayed in the drop down list.

*Machine Name.* Displays the Machine ID, if one exists for the selected work center.

*Work Center Number.* This field is currently not used.

*Equipment ID.* This field is currently not used.

## Configure Tabs

To add a tab at a work center, highlight the tab in the Available Tabs field and click the bracket button (>) to move the tab to the Assigned tabs field. To remove a tab at a work center, highlight the tab in the Assigned Tabs field and click the bracket button (<) to move the tab to the Available tabs field.

*Available Tabs.* Displays the tabs that can be added and made available at the work center.

*Assigned Tabs.* Displays the tabs that are available and visible to the operator at the work center.

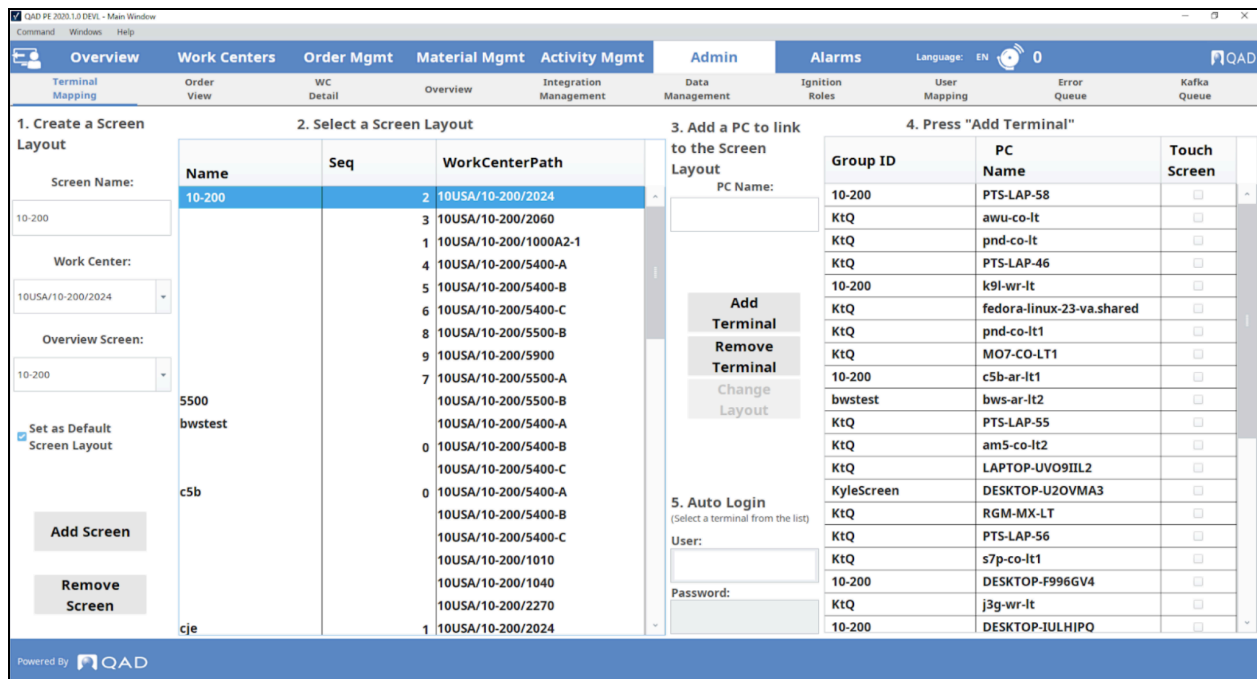
*Display Items on Production Line.* Select this check box if you use an external kanban system and want to run production at this work center based on the item, not the production order.

*Production Line.* Select the production line associated with this work center. Then click the Add Line button to confirm the link between the work center and the production line.

## Terminal Mapping Setup

Use the Admin > Terminal Mapping tab to set up work center computer terminals to work with PE. In the Terminal Mapping tab, you can:

- Register and connect the PC/terminal to PE.
- Specify the screen layout for the terminal, such as creating a Kiosk view or selecting a specific Overview screen.
- Specify if a terminal has touch screen enabled.
- Determine if Auto Login is used for the terminal.



## Create a New Screen Layout

Follow these steps to create a new screen layout for a work center terminal:

1. In the Admin > Terminal Mapping screen, enter the name of the screen layout in the Screen Name

field. You can enter a new or an existing screen name. In PE, the screen layouts are grouped together by the Screen Name.

2. From the Work Center drop down list, select which work center to associate with the screen layout.
3. From the Overview Screen drop down list, select a pre-configured Overview screen to associate with the screen layout. For information about creating an Overview screen, see [Overview Layout](#).
4. Click the Add Screen button to add the screen layout to the Screen Layout window.

## Add a New Computer

Follow these steps to add a new PC/terminal to the Terminal Mapping screen:

1. In the Admin > Terminal Mapping screen, enter the computer name in the PC Name field. To locate the computer name, right click My Computer/This PC and then select Properties > About.
2. Click the Add Terminal button to add the PC to the list of terminals.
3. Select the PC that was just added to the list of terminals.
4. Specify if the terminal is a touch screen. If the terminal is a touch screen, select the Touch Screen check box. Otherwise, leave the check box clear.
5. Specify if auto login is enabled for this terminal. To enable auto login for this terminal when PE is launched, enter the username and password in the User and Password fields.

## Change the Screen Layout for a Terminal

If necessary, you can change the screen layout for an existing work center terminal. For example, you may need to change the screen layout if a computer is moved to a different work center. Follow these steps to change the screen layout for a work center terminal:

1. In the Admin > Terminal Mapping > Screen Layout window, select the screen layout you want to change the computer to.
2. In the window listing the computer terminals, select the computer name.
3. Click the Change Layout button to apply the new screen layout to the work center terminal.

Name	Seq	WorkCenterPath
10-200	3	10USA/10-200/5400-C
	4	10USA/10-200/5500-A
	5	10USA/10-200/5500-B
	7	10USA/10-200/5500-Seal
	8	10USA/10-200/5600-S
	1	10USA/10-200/5400-A
	6	10USA/10-200/5900
	2	10USA/10-200/5400-B

Group ID	PC Name	Touch Screen
10-200	vmwvqkwina64f	<input type="checkbox"/>
10-200	mgw-co-it2	<input checked="" type="checkbox"/>
10-200	PTS-LAP-58	<input type="checkbox"/>
10-200	vmwpe0001	<input type="checkbox"/>
10-200	bct-ar-it	<input type="checkbox"/>

*Screen Name.* Enter a new screen name to associate to the work center or select an existing name. In PE, screen layouts are grouped by the Screen Name.

*Work Center.* Select the work center/machine to associate with the screen layout.

*Overview Screen.* Select the overview screen to associate with this layout.

*Set as Default Screen Layout.* Specify if this is the default screen layout. When this check box is selected, users will see this layout until they select something different.

*Add Screen.* Once you have entered the Screen Name, Work Center, and Overview Screen information, click this button to add the screen layout to the list of existing Screen Layouts.

*Remove Screen.* To remove a screen layout from the list of Screen Layouts, highlight the screen layout record and then click this button to remove it from the list.

*PC Name.* Enter the Device Name of the PC that serves as the terminal. To locate the Device Name, right click My Computer/This PC and then select Properties > About.

*Add Terminal.* After entering the computer name to the PC Name field, click this button to add the PC to the list of terminals.

*Remove Terminal.* To remove a PC from the list of terminals, highlight the terminal name and then click this button to remove it from the list.

*Change Layout.* Click this button to save any changes made to a terminal's screen layout.

*Auto Login User/Password.* Optionally, determine if operators are automatically logged into this terminal when the user launches PE.

- Auto Login (Enabled). To enable auto login for this PC when PE is launched, enter the username and password for this PC.

- Auto Login (Disabled). To disable auto login for this PC when PE is launched, leave these fields blank. When the user logs into the terminal at this work center, they will need to log in using the proper username and password.

*Touch Screen.* Select this check box so that PE recognizes that this screen is touch screen enabled.

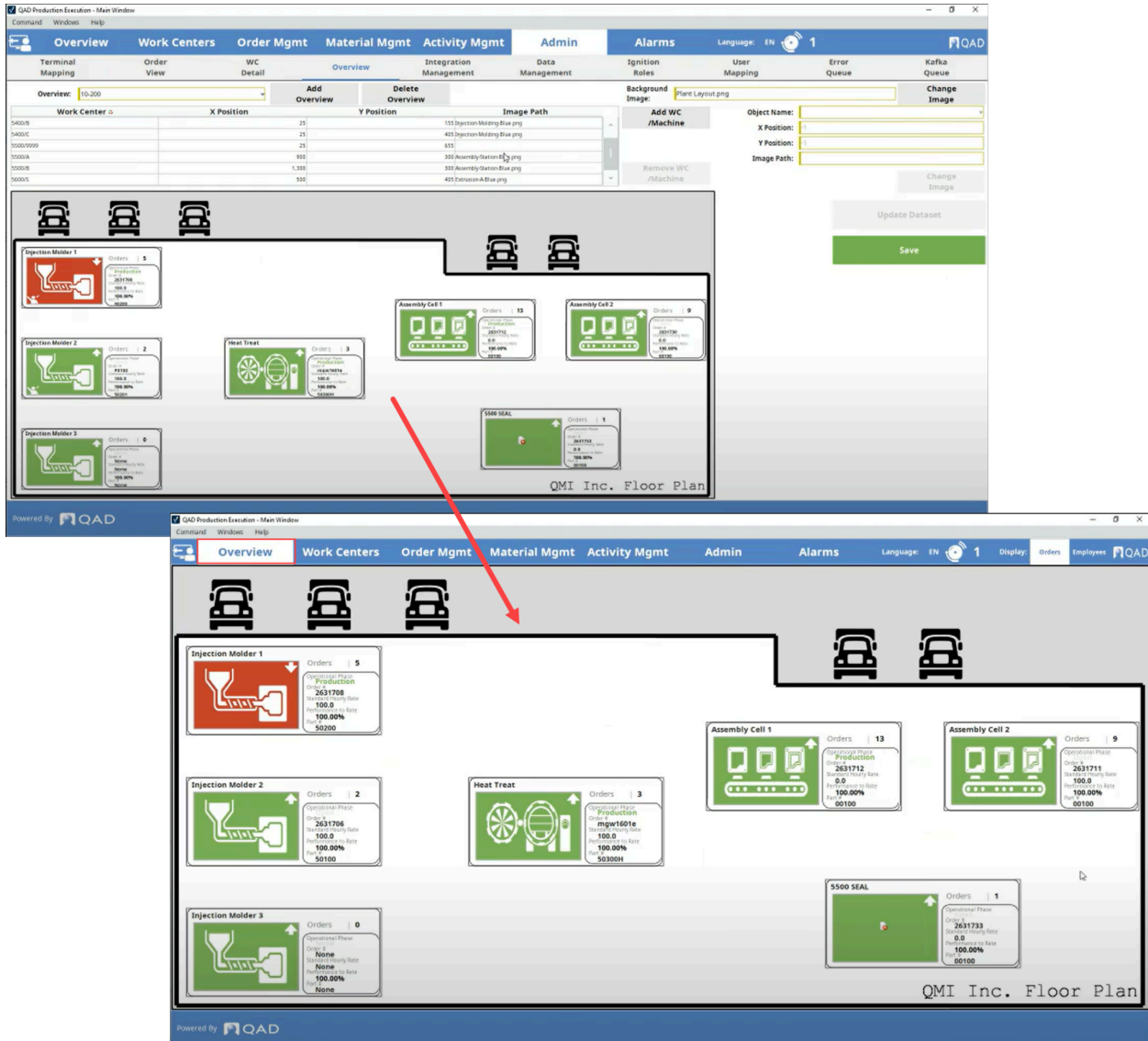
## Overview Layout Setup

Use the Admin > Overview tab to create a replica of the plant floor, which can then be displayed on work center terminals for operators to monitor production. Depending on the layout of the production floor, multiple Overview layouts can be created. For example, if a section of the production floor is dedicated to injection molding machines and another section is dedicated to CNC and metal working machines, you can set up separate Overview layouts for each section.

Work Center	X Position	Y Position	Image Path
5400A	25	50	Injection-Molding-Blue.png
5400B	25	300	Injection-Molding-Blue.png
5400C	25	550	Injection-Molding-Blue.png
1000/1901	450	50	Assembly-Station-Blue.png

In most cases, you will create an overview layout only once, during setup. This is because the layout in a manufacturing plant is fixed in place and will not move. If changes are made to the plant layout, the Overview screen allows you to make changes to existing Overview layout.

The Overview layout that you create can be assigned to a work center terminal so that operators and supervisors can monitor production. For information about assigning an Overview layout to a specific terminal, see [Terminal Mapping Setup](#).



**Overview.** Displays a list of all existing overview layouts. To create a new overview layout, enter a unique overview layout name in this field.

**Add Overview.** After entering a new overview layout name in the Overview field, click this button to add that name to the Overview field’s drop down list.

**Delete Overview.** To delete an existing overview layout from the Overview drop down list, select the overview layout name and then click this button.

**Background Image.** Enter the filename (including the extension) for the background image that is displayed behind the work center/machine set up. Alternatively, you can click the Change Image button to view a list of available images on the server.

Because the images are located on a Linux server, the filename is case sensitive and it must match the case of the filename stored on the server. The directory in which the icons are stored is determined by the settings in Admin > Integration Management. The filename of this image references the file located in that directory.

**Note:** When configuring the Ignition Designer during PE installation, a collection of icons and images are provided with the installation package. Users can add their own custom icons if necessary. For more information, see the Ignition Designer configuration section in the *Production Execution Installation Guide*. Enter the complete file name that matches the letter case in Linux.

*Change Image.* Click this button to see a list of the available images on the Linux server.

*Object Name.* Select which work center/machine data is displayed in the Overview layout. The drop down list displays the work center configurations that were created in the WC Detail screen. For information about setting up work center configurations, see [Work Center Configuration](#).

*X Position.* Enter the X axis position (in pixels) of the top left corner of the object graphic. To change the position of an object graphic, select the work center from the Object Name drop down list, enter a new X/Y axis position, and then click Save.

*Y Position.* Enter the Y axis position (in pixels) of the top left corner of the object graphic. To change the position of an object graphic, select the work center from the Object Name drop down list, enter a new X/Y axis position, and then click Save.

*Image Path.* Displays the file location for the object graphic. The image path for a Work Center/Machine is defined in the Work Center Configurations screen in QAD Adaptive ERP.

*Add WC/Machine.* Click this button to add a new empty record. Select this option to create a new record in the overview window. This record reflects the work center/machine with the desired X/Y axis positioning and the associated image.

*Remove WC/Machine.* Select this button to remove an existing Work Center/Machine from the overview layout.

## Define Role Functions

Use the Admin > Ignition Roles tab to view a list of the defined users and the roles they are associated with. When you click on a role, a list of the available PE tabs appears on the right. Select a corresponding check box to make that tab visible to that role. Clear the checkbox to hide that tab from the role. You can choose to show/hide all tabs for that particular role or you can selectively turn on/off sub-tabs.

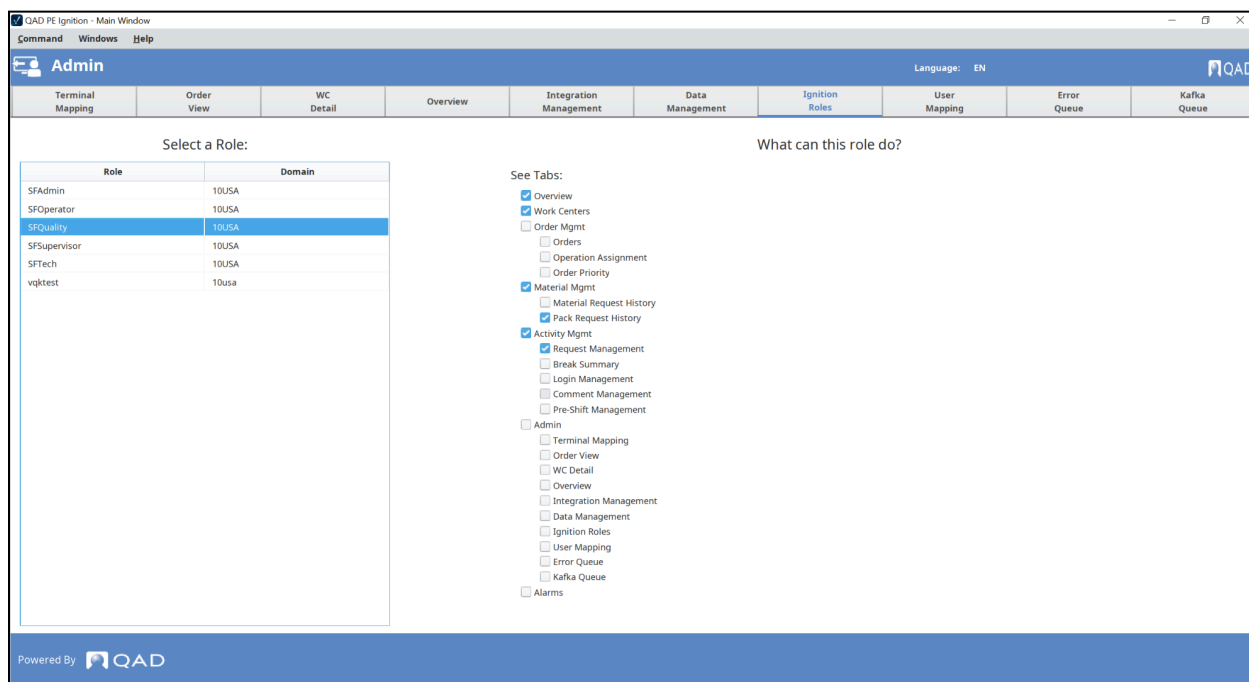
The PE Roles are created in QAD Adaptive ERP and imported when you select the Get Role Data Execute button on the Data Management tab. For more information, see [Data Management](#).

The access provided by a role can be different by domain. The tabs that a specific role can access can be different based on job function. For example, the SFOP Role would likely only be given access to the Work Centers while the SFAdmin Role may be given access to all Tabs in PE.

The following table represents the suggested PE Role to PE Tab(s) assignment:

Company Role	Role Name in PE	Tab Access in PE
Operator	SFOperator	Work Centers
Administrator	SFAdmin	Overview, Work Centers, Order Mgmt, Material Mgmt,

		Activity Mgmt, Admin, Alarms
Supervisor	SFSupervisor	Overview, Work Centers, Order Mgmt, Material Mgmt, Activity Mgmt
Quality Inspector	SFQuality	Overview, Activity Mgmt
Technician	SFTech	Overview, Activity Mgmt

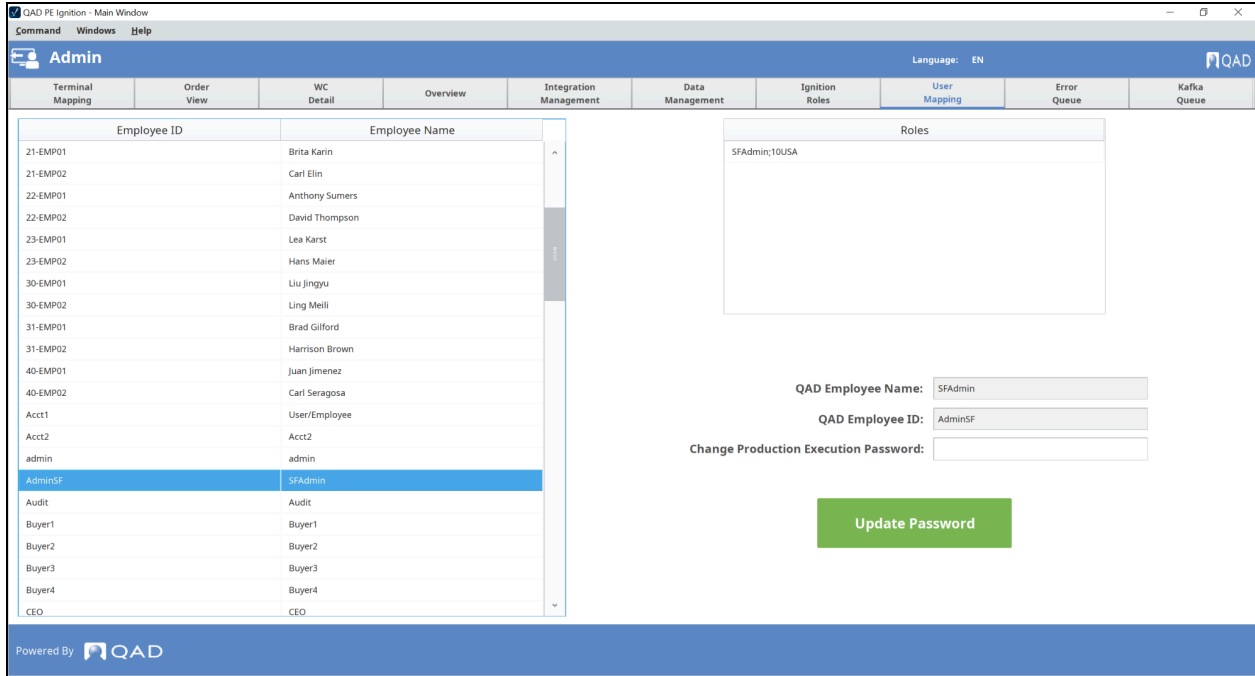


## User Mapping

Use the Admin > User Mapping tab to view a list of Employee IDs and the specific PE Role they are associated with.

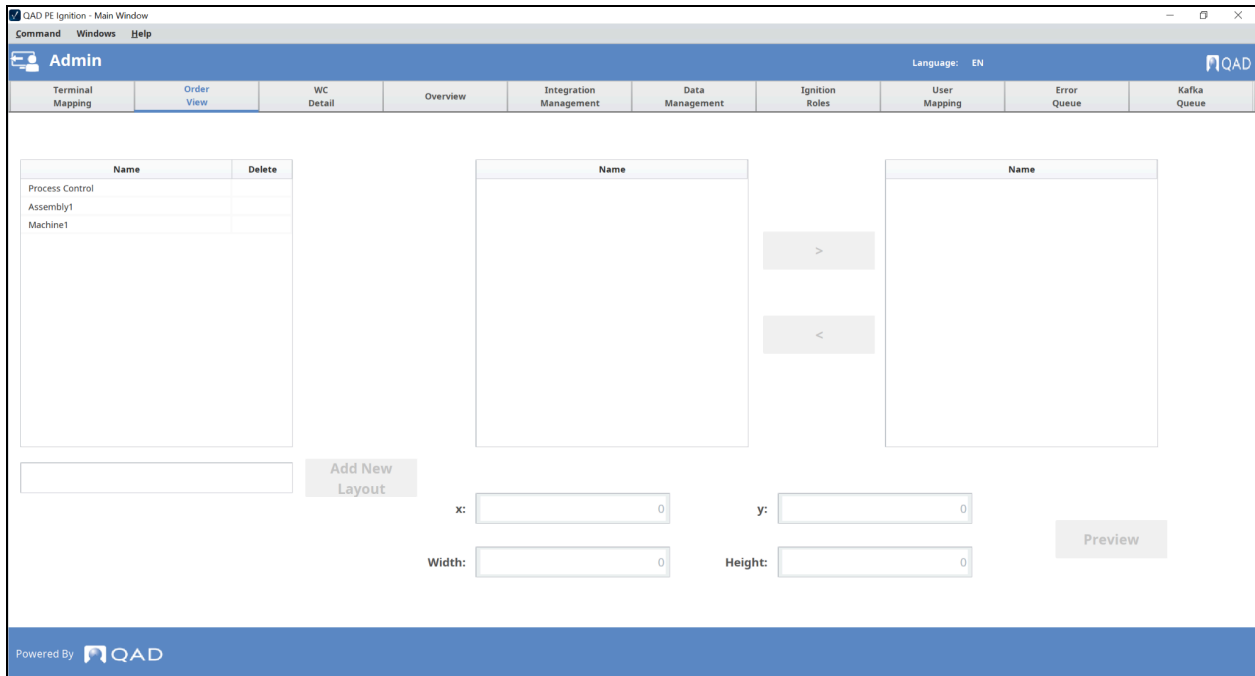
In this tab, you can change the password used by the Employee ID/Role to log into PE. To change the password, select the Employee ID and then enter the new password in the Production Execution Password field. Then click the Update Password button.

The PE Roles and Employee IDs are created in QAD Adaptive ERP and imported when you select the Get Role Data and Get Employee Data Execute buttons on the Data Management tab. For more information, see [Data Management](#).



## Order View

Use the Admin > Order View tab to see a preview of a specific order view. Select the order view in the left window and then click the Preview button.







Appendix A

# Reference Information

This chapter discusses .

## Installing the Vision Client Launcher

Please follow the instructions below and use the Ignition Gateway URL provided to you in the email (not the one in the screenshots). If your PE administrator has not already asked for your system name, please see Appendix A for instructions on how to find it. All computers need to be registered to the correct setup, since Production Execution has different login scenarios even within a single plant. If you are the PE Administrator, please see Appendix B for instructions on linking system names with terminal settings.

1. Download the Vision Client Launcher from <https://inductiveautomation.com/>. This step is mandatory if this is the first time you are installing the Vision Client Launcher. (Mandatory if this is your first ever PE installation, should be skipped for all others).
2. Open Vision Client Launcher
3. Add Application
4. Manually Add Gateway
5. Enter Gateway URL and Add Gateway
6. Add Project
7. Launch
8. Enter the user/password provided by your PE Administrator

## Loading Web UI Screen Data

To streamline the implementation process, users can use the import and export functions to load data from Excel spreadsheets into the Web UI screens. This section covers the following topics:

- Using the Export function to create a properly formatted Excel spreadsheets.
- Using the Import function to add records to a Web UI PE screen.
- Using the Import and Export functions to delete multiple records in a Web UI PE screen.

## Exporting Web UI Screen Data

The following procedure shows how to use the export function in the Web UI to:

- Export the records in a Web UI screen as an Excel (.xlsx), Comma-separated (.csv), Tab-separated (.tsv), Tab-delimited (.txt), or PDF Document (.pdf) file type.
- Create an Excel file that is properly formatted for importing.
- Create an Excel file that is properly formatted for deleting multiple records.

Follow these steps to export the records from a Web UI screen:

1. Open the Web UI screen with the records that are to be exported. In this example, the Operation Phases data will be exported.

SITE	Phase	Description	Show in Active	Show in Open	Alias	Show in Complete/Final Phase	Background Color	Allow Operation Reassign	Accrue Productive Labor	Repo
10-200	Complete		NO	NO	Op Complete	YES	#EBEBEB	NO	NO	NO
10-200	CompleteSetup		YES	YES	Setup Completed	YES	#9959B3	NO	NO	NO
10-200	Open		NO	YES	Open	YES	#EBEBEB	NO	NO	NO
10-200	PausedProduction		YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedSetup		YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedTeardown		YES	YES	Paused	YES	#F1C410	NO	NO	NO
10-200	Production		YES	YES	Production	YES	#7EB759	NO	NO	YES
10-200	Setup		YES	YES	Setup	YES	#9959B3	YES	NO	NO
10-200	StoppedProd		NO	YES	Stopped	YES	#C13A2B	YES	NO	NO
10-200	StoppedSetup		NO	YES	Stopped	YES	#C13A2B	YES	NO	NO
10-200	Teardown		YES	YES	Teardown	YES	#008392	NO	NO	NO
10-100	TEST	test for integration	YES	NO	Alias1	YES	BGC1	NO	NO	YES

2. From the More drop down menu, select Export.

SITE	Phase	Description	Show in Active	Show in Open	Alias	Show in Complete/Final Phase	Background Color	Allow Operation Reassign	Accrue Productive Labor
10-200	Complete		NO	NO	Op Complete	YES	#EBEBEB	NO	NO
10-200	CompleteSetup		YES	YES	Setup Completed	YES	#9959B3	NO	NO
10-200	Open		NO	YES	Open	YES	#EBEBEB	NO	NO
10-200	PausedProduction		YES	YES	Paused	YES	#F1C410	YES	NO
10-200	PausedSetup		YES	YES	Paused	YES	#F1C410	YES	NO
10-200	PausedTeardown		YES	YES	Paused	YES	#F1C410	NO	NO
10-200	Production		YES	YES	Production	YES	#7EB759	NO	NO
10-200	Setup		YES	YES	Setup	YES	#9959B3	YES	NO
10-200	StoppedProd		NO	YES	Stopped	YES	#C13A2B	YES	NO
10-200	StoppedSetup		NO	YES	Stopped	YES	#C13A2B	YES	NO
10-200	Teardown		YES	YES	Teardown	YES	#008392	NO	NO
10-100	TEST	test for integration	YES	NO	Alias1	YES	BGC1	NO	NO

3. In the File Name field, enter the File Name for the exported file.

4. In the Type field, select one of the following options:

- **Export with Import Format.** Select this option to create an Excel spreadsheet that is properly formatted for importing data to this Web UI screen. You would also select this option if you are creating an Excel spreadsheet for deleting records.

When selected, the File Type is set to Excel.

- **Export With Browse Columns.** Select this option to export the the records on this Web UI screen in one of the following File Types: Excel (.xlsx), Comma-separated (.csv), Tab-separated (.tsv), Tab-delimited (.txt), or PDF Document (.pdf).

5. If the Type is set to Export With Browse Columns, select the file type that will be exported: Excel (.xlsx), Comma-separated (.csv), Tab-separated (.tsv), Tab-delimited (.txt), or PDF Document (.pdf).
6. Select the Include Child Grid Fields check box if there are parent/child relationships with the records. Otherwise, do not select this option. When selected, the exported file will include the child grid fields.
7. Select the Record Delete check box only if you are creating an Excel spreadsheet for record deletion. Otherwise, make sure this check box is not selected.

**Note:** When this option is selected, the exported Excel file contains a Delete Record column, which allows you to identify the records to be deleted.

8. Select Export to export the records.

Operation Phases > Export

**Export**

Search Criteria  
Criteria: No criteria selected  
Records Returned: 12

File Properties  
File Name: LoadTemplate\_OperationPhases  
Type: Export With Import Format  
Include Child Grid Fields:  Current Stored View Fields  
Format For Record Delete:   
File Type: Excel (.xlsx)

Export File  
The export file will be sent to your inbox.

Export Cancel

9. The exported document is stored in the notifications on the top right-hand side of the screen. Select the document to open the file.

QAD Super User Role Operation Phases

Operation Phases | Default View | New | Edit | More

SITE greater or equal to Search

SITE	Phase	Description	Show in Active	Show in Open	Alias	Show in Complete/Final Phase
10-200	Complete		NO	NO	Op Complete	YES
10-200	CompleteSetup		YES	YES	Setup Completed	YES
10-200	Open		NO	YES	Open	YES
10-200	PausedProduction		YES	YES	Paused	YES
10-200	PausedSetup		YES	YES	Paused	YES
10-200	PausedTeardown		YES	YES	Paused	YES
10-200	Production		YES	YES	Production	YES
10-200	Setup		YES	YES	Setup	YES
10-200	StoppedProd		NO	YES	Stopped	YES
10-200	StoppedSetup		NO	YES	Stopped	YES
10-200	Teardown		YES	YES	Teardown	YES
10-100	TEST	test for integration	YES	NO	Alias1	YES

Inbox (0) Notifications (1)  
LoadTemplate\_OperationPhases Export Submitted For Operation Phases  
10USJA, 10USKACD  
View Inbox

## Importing Web UI Screen Data

**Note:** To import data from an Excel (.xlsx) file, the .xlsx file must be formatted correctly for that specific Web UI screen. Once you have added the records to the properly formatted Excel file, you can import the records to the screen. For information about creating a properly formatted Excel file, see [Exporting Web UI Screen Data](#).

Follow these steps to add records to a properly formatted Excel spreadsheet and then import those records to a Web UI screen:

1. Open the .xlsx file that was created from the Export process. Add a row at the bottom of the spreadsheet and enter the required data. In the following example, 'Test Phase' has been added.

Phase	Description	SITE	Alias	Background Color	Foreground Color	Report Production	Accrue Productive Labor	Request Material	Include in Performance Rate	Show in Active	Show in Open	Show in Complete/Final Phase	Allow Operation Reassign	Start/Stop
PausedProduction	10-200	Paused	#F1C410			NO	NO	YES	NO	YES	YES	YES	YES	YES
PausedSetup	10-200	Paused	#F1C410			NO	NO	NO	NO	YES	YES	YES	YES	YES
PausedTeardown	10-200	Paused	#F1C410			NO	NO	NO	NO	YES	YES	YES	NO	YES
Production	10-200	Production	#7EB759			YES	YES	YES	YES	YES	YES	YES	NO	NO
Setup	10-200	Setup	#955983			NO	NO	NO	NO	YES	YES	YES	YES	NO
StoppedProd	10-200	Stopped	#C13A28			NO	NO	NO	NO	NO	YES	YES	YES	YES
StoppedSetup	10-200	Stopped	#C13A28			NO	NO	NO	NO	NO	YES	YES	YES	YES
Teardown	10-200	Teardown	#008392			NO	NO	NO	NO	YES	YES	YES	NO	NO
TEST	test for integration	10-100	Alias1	BGC1	FGC1	YES	NO	YES	NO	YES	NO	YES	NO	YES
Test Phase	Add Phase for impor	10-200	Alias2	#EBE8EB		YES	NO	YES	NO	YES	NO	YES	NO	YES

2. In the Web UI screen, select Import from the More drop down menu.

The screenshot shows the 'Operation Phases' table in the QAD system. The 'More' menu is open, and the 'Import' option is highlighted. The table contains the following data:

SITE	Phase	Description	Show in Active	Permissions	Open	Alias	Show in Complete/Final Phase	Background Color	Allow Operation Reassign	Accrue Productive Labor	Repo
10-200	Complete		NO		Op Complete	YES		#E8E8E8	NO	NO	NO
10-200	CompleteSetup		YES		Setup Completed	YES		#959583	NO	NO	NO
10-200	Open		NO	YES	Open	YES		#E8E8E8	NO	NO	NO
10-200	PausedProduction		YES	YES	Paused	YES		#F1C410	YES	NO	NO
10-200	PausedSetup		YES	YES	Paused	YES		#F1C410	YES	NO	NO
10-200	PausedTeardown		YES	YES	Paused	YES		#F1C410	NO	NO	NO
10-200	Production		YES	YES	Production	YES		#7E8759	NO	NO	YES
10-200	Setup		YES	YES	Setup	YES		#959583	YES	NO	NO
10-200	StoppedProd		NO	YES	Stopped	YES		#C13A2B	YES	NO	NO
10-200	StoppedSetup		NO	YES	Stopped	YES		#C13A2B	YES	NO	NO
10-200	Teardown		YES	YES	Teardown	YES		#008392	NO	NO	NO
10-100	TEST	test for integration	YES	NO	Alias1	YES		BGC1	NO	NO	YES

- In the Import window, select Choose File and then select the .xlsx file with the records to be imported. The Import window displays the first ten lines of data to be imported.

The screenshot shows the 'Import' window in the QAD system. The 'Choose File' button is highlighted, and the 'Import' button is also highlighted. The window displays the following information:

- Choose File:** A dashed box containing a 'Choose File' button and the text 'or drag file here'.
- Data Preview:** A section titled 'Preview of uploaded data (first ten lines)' with a greyed-out area below it.
- Import Results:** A section titled 'Results will be sent to your inbox'.

- Select Import to import the records.
- Refresh the Web UI screen to see the added records.

QAD SuperUser Role Operation Phases

10USA, 10USACO

Operation Phases Default View + New Edit More

SITE greater or equal to Search

SITE	Phase	Description	Show in Active	Show in Open	Alias	Show in Complete/Final Phase	Background Color	Allow Operation Reassign	Accrue Productive Labor	Repo
10-200	Complete		NO	NO	Op Complete	YES	#E8E8E8	NO	NO	NO
10-200	CompleteSetup		YES	YES	Setup Completed	YES	#999999	NO	NO	NO
10-200	Open		NO	YES	Open	YES	#E8E8E8	NO	NO	NO
10-200	PausedProduction		YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedSetup		YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedTeardown		YES	YES	Paused	YES	#F1C410	NO	NO	NO
10-200	Production		YES	YES	Production	YES	#7E7579	NO	NO	YES
10-200	Setup		YES	YES	Setup	YES	#999999	YES	NO	NO
10-200	StoppedProd		NO	YES	Stopped	YES	#C13A28	YES	NO	NO
10-200	StoppedSetup		NO	YES	Stopped	YES	#C13A28	YES	NO	NO
10-200	Teardown		YES	YES	Teardown	YES	#008392	NO	NO	NO
10-100	TEST	test for integration	YES	NO	Alias1	YES	BGC1	NO	NO	YES
10-200	Test Phase	Add Phase for Import	YES	NO	Alias2	YES	#E8E8E8	NO	NO	YES

Records per page: 100 1 - 13 of many Show all

## Using Export and Import Functions to Delete Web UI Records

The Import and Export functions in the Web UI can also be used to delete a batch of records from a Web UI screen.

Follow these steps to delete a batch of records from a Web UI screen:

1. To delete a batch of records, you must first create an Excel file (.xlsx) that is properly formatted for record deletion. For instructions, see [Exporting Web UI Screen Data](#).
2. The exported Excel file contains a Delete Record column, which allows you to identify the records to be deleted. Enter Yes to specify which records will be deleted; enter No to specify which records will not be deleted.
3. Save the Excel file.

The screenshot shows an Excel spreadsheet with the following data:

Delete Record	Phase	Description	SITE	Alias	Background Color	Foreground Color	Report Production	Accrue Productive Labor	Request Material	Include In Performance Rate	Show in Active	Show in Open	Show in Complete/Final Phase	Allow Operation
No	Complete	10-200 Op Complete	10-200	Op Complete	#E8EBEB		NO	NO	NO	NO	NO	NO	YES	NO
No	CompleteSetup	10-200 Setup Completed	10-200	Setup Completed	#9595B3		NO	NO	YES	NO	YES	YES	YES	NO
No	Open	10-200 Open	10-200	Open	#E8EBEB		NO	NO	NO	NO	NO	YES	YES	NO
No	PausedProduction	10-200 Paused	10-200	Paused	#F1C410		NO	NO	YES	NO	YES	YES	YES	YES
No	PausedSetup	10-200 Paused	10-200	Paused	#F1C410		NO	NO	NO	NO	YES	YES	YES	YES
No	PausedTeardown	10-200 Paused	10-200	Paused	#F1C410		NO	NO	NO	NO	YES	YES	YES	NO
No	Production	10-200 Production	10-200	Production	#78B759		YES	NO	YES	YES	YES	YES	YES	NO
No	Setup	10-200 Setup	10-200	Setup	#9595B3		NO	NO	NO	NO	YES	YES	YES	YES
No	StoppedProd	10-200 Stopped	10-200	Stopped	#C13A2B		NO	NO	NO	NO	NO	YES	YES	YES
No	StoppedSetup	10-200 Stopped	10-200	Stopped	#C13A2B		NO	NO	NO	NO	NO	YES	YES	YES
No	Teardown	10-200 Teardown	10-200	Teardown	#808392		NO	NO	NO	NO	YES	YES	YES	NO
No	TEST	test for integration	10-100	Alias1	B0C1	FGC1	YES	NO	YES	NO	YES	NO	YES	NO
Yes	1st Phase	Add Phase for Import	10-200	Alias2	#E8EBEB		YES	NO	YES	NO	YES	NO	YES	NO

4. From the Web UI screen, select Import from the More drop down menu.

The screenshot shows the 'Operation Phases' list in the QAD system. The 'More' menu is open, and the 'Import' option is highlighted. The table below represents the data visible in the screenshot:

SITE	Phase	Description	Show in Active	Permissions	n Open	Alias	Show in Complete/Final Phase	Background Color	Allow Operation Reassign	Accrue Productive Labor	Repo
10-200	Complete		NO		YES	Op Complete	YES	#EBEBEB	NO	NO	NO
10-200	CompleteSetup		YES		YES	Setup Completed	YES	#9959B3	NO	NO	NO
10-200	Open		NO	YES	YES	Open	YES	#EBEBEB	NO	NO	NO
10-200	PausedProduction		YES	YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedSetup		YES	YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedTeardown		YES	YES	YES	Paused	YES	#F1C410	NO	NO	NO
10-200	Production		YES	YES	YES	Production	YES	#7EB759	NO	NO	YES
10-200	Setup		YES	YES	YES	Setup	YES	#9959B3	YES	NO	NO
10-200	StoppedProd		NO	YES	YES	Stopped	YES	#C13A2B	YES	NO	NO
10-200	StoppedSetup		NO	YES	YES	Stopped	YES	#C13A2B	YES	NO	NO
10-200	Teardown		YES	YES	YES	Teardown	YES	#008392	NO	NO	NO
10-100	TEST	test for integration	YES	NO	NO	Alias1	YES	BGC1	NO	NO	YES
10-200	Test Phase	Add Phase for Import	YES	NO	NO	Alias2	YES	#EBEBEB	NO	NO	YES

- In the Import window, select Choose File and then select the .xlsx file that contains the list of records to be deleted. The Import window displays the first 10 lines of records in the file.
- Select Import to delete the records from the Web UI screen.

The screenshot shows the 'Import' window in the QAD system. A file named 'LoadTemplate\_OpDelete\_20200902175229\_mfg.xlsx' is selected. Below the file name is a 'Data Preview' table showing the first ten lines of the uploaded data:

Delete Record	Phase	Description	SITE	Alias	Background Color	Foreground Color	Report Production	Accrue Productive Labor	Request Material	Include in Performance Rate	Show in Active
No	Complete		10-200	Op Complete	#EBEBEB		NO	NO	NO	NO	NO
No	CompleteSetup		10-200	Setup Completed	#9959B3		NO	NO	YES	NO	YES
No	Open		10-200	Open	#EBEBEB		NO	NO	NO	NO	NO
No	PausedProduction		10-200	Paused	#F1C410		NO	NO	YES	NO	YES
No	PausedSetup		10-200	Paused	#F1C410		NO	NO	NO	NO	YES
No	PausedTeardown		10-200	Paused	#F1C410		NO	NO	NO	NO	YES
No	Production		10-200	Production	#7EB759		YES	NO	YES	YES	YES
No	Setup		10-200	Setup	#9959B3		NO	NO	NO	NO	YES
No	StoppedProd		10-200	Stopped	#C13A2B		NO	NO	NO	NO	NO

- Refresh the page to verify the records are deleted.

SITE	Phase	Description	Show in Active	Show in Open	Alias	Show in Complete/Final Phase	Background Color	Allow Operation Reassign	Accrue Productive Labor	Repo
10-200	Complete		NO	NO	Op Complete	YES	#E8E8E8	NO	NO	NO
10-200	CompleteSetup		YES	YES	Setup Completed	YES	#9959B3	NO	NO	NO
10-200	Open		NO	YES	Open	YES	#E8E8E8	NO	NO	NO
10-200	PausedProduction		YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedSetup		YES	YES	Paused	YES	#F1C410	YES	NO	NO
10-200	PausedTeardown		YES	YES	Paused	YES	#F1C410	NO	NO	NO
10-200	Production		YES	YES	Production	YES	#7E8759	NO	NO	YES
10-200	Setup		YES	YES	Setup	YES	#9959B3	YES	NO	NO
10-200	StoppedProd		NO	YES	Stopped	YES	#C13A28	YES	NO	NO
10-200	StoppedSetup		NO	YES	Stopped	YES	#C13A28	YES	NO	NO
10-200	Teardown		YES	YES	Teardown	YES	#008392	NO	NO	NO
10-100	TEST	test for integration	YES	NO	Alias1	YES	B0C1	NO	NO	YES

## Color Code Reference

When setting the colors that are displayed on the PE screen, use the following table as reference.

Color	Hex Code (Background/Foreground)	RGB (Production Options)	Example
Red	#FF0000	255,0,0	
Orange	#FFA500	255, 165, 0	
Cyan	#00FFFF	0,255,255	
Blue	#0000FF	0,0,255	
Dark Blue	#0000A0	9,0,160	
Light Blue	#ADD8E6	173,216,230	
Purple	#800080	128,0,128	
Light Purple	#cbc3e3	255, 87, 51	
Yellow	#FFFF00	255,255,0	
Lime	#00FF00	0,255,0	
Magenta	#FF00FF	255,0,255	
White	#FFFFFF	255,255,255	
Light Gray	#C0C0C0	192,192,192	
Gray	#808080	128,128,128	

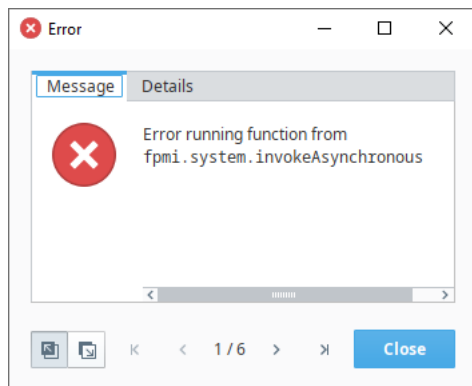
Black	#000000	0,0,0	
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## Troubleshooting

This section covers issues that you may encounter when setting up QAD Production Execution.

### Receiving invokeAsynchronous error in PE

If you receive an invokeAsynchronous error in PE, this generally indicates there is an issue with work center tags.



#### Solution

1. Log into PE as Adminsf.
2. Select the Admin > Data Management tab.
3. Click the Delete All Work Center Tags button to delete the work center tag data in PE.
4. Click the Restore Work Center Tags button to import the updated work center tag data from QAD Adaptive ERP into PE.
5. The work center data in PE is now refreshed and reflects the updated work center data in QAD Adaptive ERP.

### Released Orders Do Not Show in PE

If you are releasing orders in QAD Adaptive ERP and they are not showing up in PE, this often indicates a setup issue with operation phases. For more information about setting up operation phases and operation phase groups, see [Operation Phase Setup](#).

#### Solution

1. Confirm that an operation phase group has been assigned to the appropriate work center class in the Operation Phase Groups in QAD Adaptive ERP.
2. Confirm that the operation phase group contains the appropriate phases and that the Default checkbox is selected for the Open phase.
3. Confirm that the phase group transitions go from Open to Setup or Open to Production or another

transition that makes logical sense.

## Order Disappears in PE After Changing the Operation Phase

If an order disappears after you change the operation phase, this often indicates a setup issue with operation phase transitions. For more information about setting up operation phases and operation phase groups, see [Operation Phase Setup](#).

### Solution

1. Confirm that an operation phase group has been assigned to the appropriate work center class in the Operation Phase Groups in QAD Adaptive ERP.
2. Confirm that the operation phase group contains the appropriate phases and that the Default checkbox is selected for the Open phase.
3. Confirm that there is an entry in phase group transitions that supports the transition from the original phase to the desired phase.
4. In Operation Phases in QAD Adaptive ERP, confirm that the target operation phase has one of the following checkboxes selected: Show in Active, Show in Open, or Show in Complete/Final Phase.

Show in Active

Show in Open

Show in Complete/Fina...

## Cannot Exit After Changing the Equipment State

If you change the equipment state on a device and then cannot exit, this indicates a setup issue with the equipment state transitions. For more information about setting up equipment state transitions, see [Equipment States Setup](#).

### Solution

1. Confirm that an equipment state phase group has been assigned to the appropriate work center class in Equipment State Groups in QAD Adaptive ERP.
2. Confirm that the equipment state group has all of the expected equipment states assigned.
3. Confirm that the state you set your equipment to has a transition available to one (or more) of the other equipment states.