



**ERP Consulting
Web Development
Custom Programming Solutions
Desktop & Web Applications for Manfact**

NorthClark Computing, Inc.

Work Order Batch Creation User Guide

**Web and Desktop Applications
for Manfact by Epicor**

September, 2006

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Introduction

NorthClark's *Work Order Batch Creation* is designed to streamline the process of creating sub-assembly work orders. The Work Order Batch Creation product is a Windows based desktop application that may be used to create sub-assembly work order records in your Manfact system.

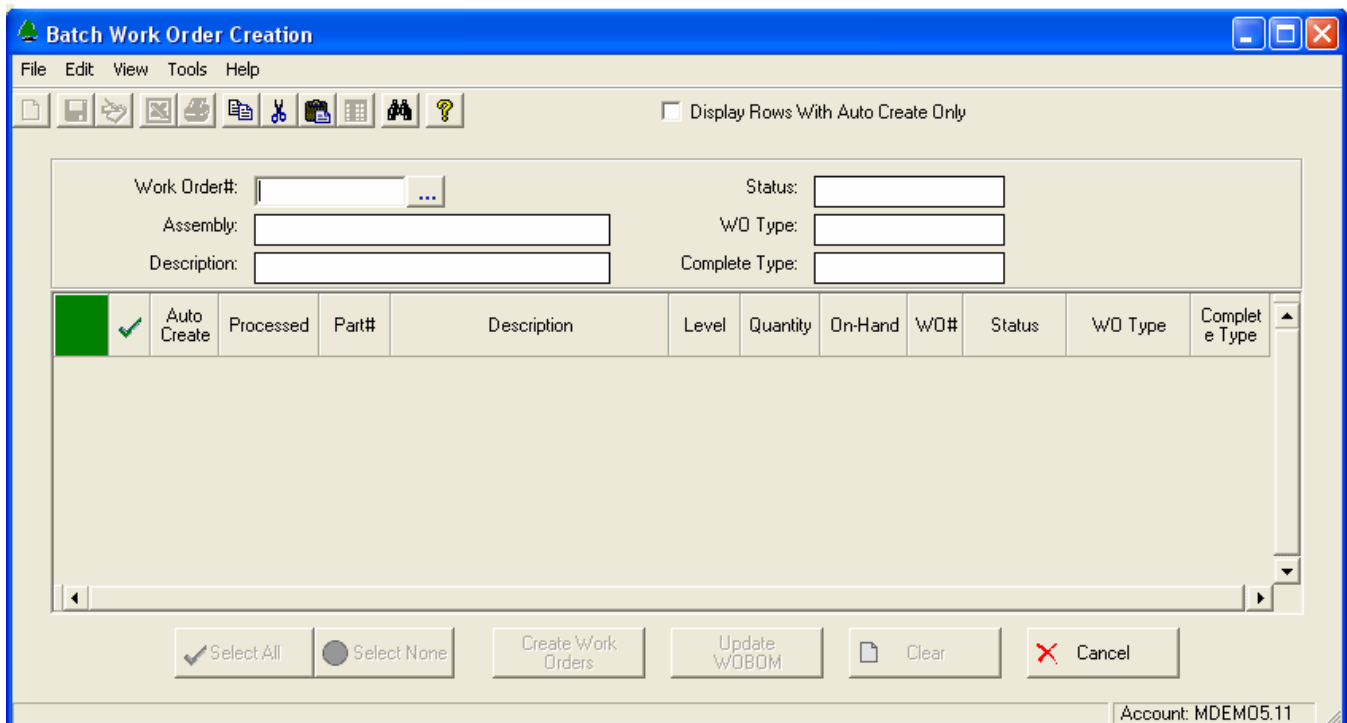
The Work Order Batch Creation application allows you to:

- ❑ Create sub-assembly work orders for upper level work orders that have a status of “N”ew, “O”pen and “R”eleased work orders.
- ❑ Select and de-select sub-assemblies for the purpose of work order creation.
- ❑ Provides the user with visibility to the sub-assemblies for which work orders will be created.
- ❑ To provide additional reporting flexibility, the estimate may be exported to Microsoft Excel.

Main Screen

Batch Work Order Creation

When you open the Work Order Batch Creation procedure, the following view will be the shown to you.



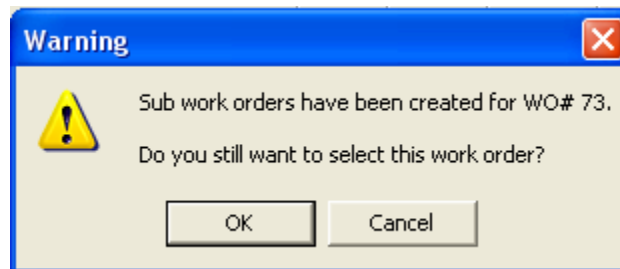
- ❑ Enter the Work Order Number in the field provided. If you don't know the Work Order Number, click on the icon to the right of the entry field and you will be taken to the *Work Order Number Search* procedure described below.

Note, you may not create sub-assembly Work Orders if the top assembly Work Order is in pulled or back order status. You will receive the following message.



- You have the option to view sub-assemblies that have the auto-create field set to “N” or not based on whether you place a check in the field called Display Rows With Auto Create Only.

Note, if the Work Order has already been through this process and has created work orders you will receive the following warning message:

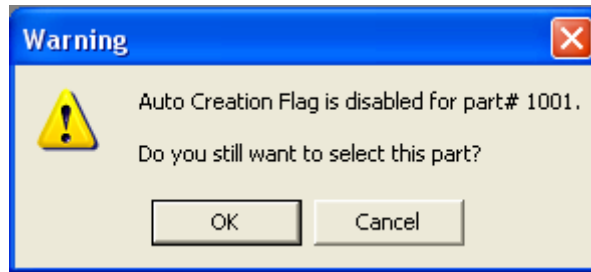


If for some reason you do wish to re-create Work Orders through this process, you will need to manually cancel the original Work Orders through WO.C in Manfact.

- Once the Work Order Number has been entered the view will be updated with the following information.

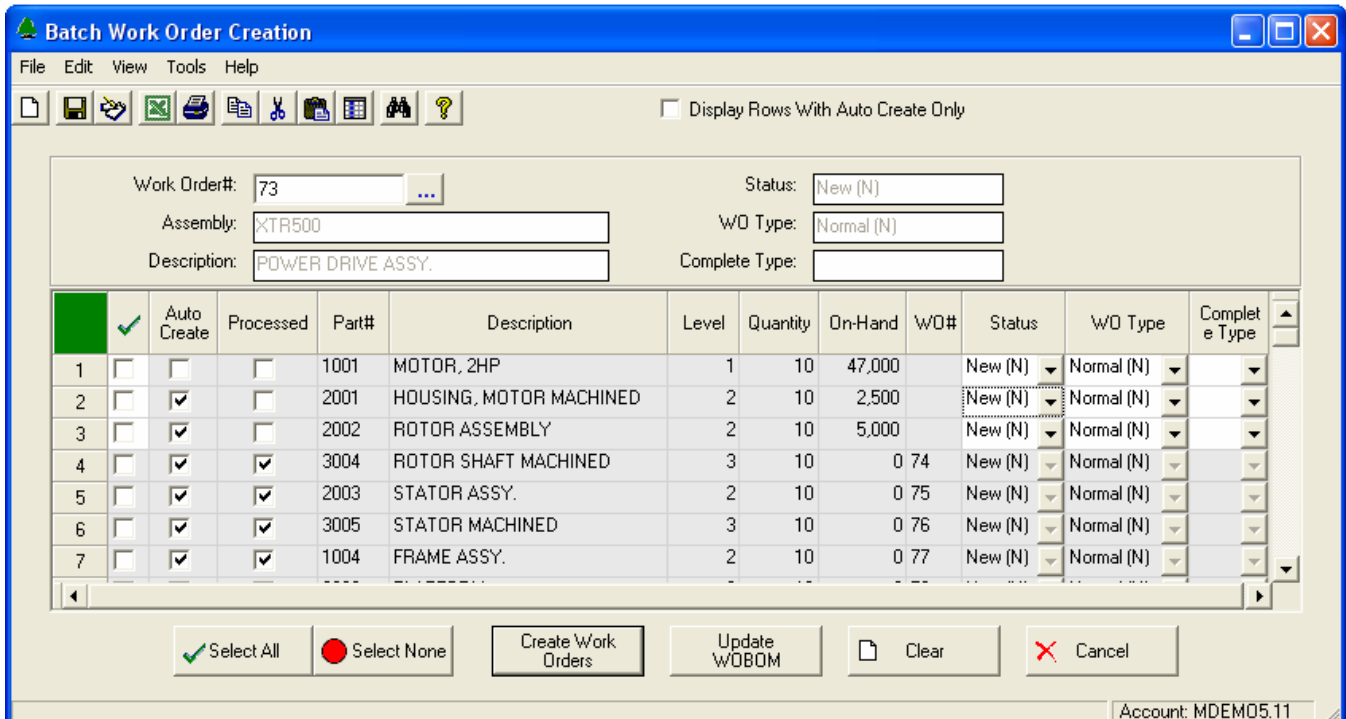
	<input checked="" type="checkbox"/>	Auto Create	Processed	Part#	Description	Level	Quantity	On-Hand	WO#	Status	WO Type	Complete Type
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1001	MOTOR, 2HP	1	10	47,000		New (N)	Normal (N)	
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2001	HOUSING, MOTOR MACHINED	2	10	2,500		New (N)	Normal (N)	
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2002	ROTOR ASSEMBLY	2	10	5,000		New (N)	Normal (N)	
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3004	ROTOR SHAFT MACHINED	3	10	0		New (N)	Normal (N)	
5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2003	STATOR ASSY.	2	10	0		New (N)	Normal (N)	
6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3005	STATOR MACHINED	3	10	0		New (N)	Normal (N)	
7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1004	FRAME ASSY.	2	10	0		New (N)	Normal (N)	

- Sub-Assemblies with the auto-create field set to “N” will have a null value in the Auto Create column. This may be updated by the user to create a Work Order by clicking on the select field, thus adding a checkmark to the column. You will receive the following message.



Note, sub-assemblies with an XPL code of XP will not be shown irrespective of the value entered into the Auto Create field of the PARTS file. This is considered as a phantom assembly and work orders will not be created for a phantom assembly. If this coding is incorrect you will need to clear the screen, go back to the PARTS entry screen and change the XPL code to X then return to NCC_WOB.

- Click the [OK] button to proceed or [Cancel] to remove the change.
- You may deselect any item by removing the check in the selection column.
- You may change the Status, WO Type or Complete Type of any line item prior to creating the Work Order.
- If you wish to update your WOBOM to your latest BOM, click on the [Update WOBOM] button or select the option from the File Menu.
- When all of the items you wish to create Work Orders for are properly coded, click the [Create Work Orders] button. This will create the Work Orders.



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The following is a description of the fields displayed:

Header	Work Order #	Top Assembly Work Order Number
Header	Assembly	Top Assembly Part Number
Header	Description	Top Assembly Part Description
Header	Status	Top Assembly Work Order Status
Header	WO Type	Top Assembly Work Order Type
Header	Complete Type	Top Assembly Work Order Complete Type
Line Item	Selection	Click on this field to add or remove the auto select field check.
Line Item	Auto Create	If checked, a sub-assembly work order may be created when [Create Work Orders] is executed.
Line Item	Part Number	Sub-Assembly Part Number
Line Item	Description	Sub Assembly Part Description
Line Item	Level	BOM Indention Level
Line Item	Quantity	Quantity needed for the Sub-Assembly to build the Top Assembly Work Order
Line Item	On Hand	Current On Hand Quantity of the Sub-Assembly in Stock.
Line Item	WO #	Work Order Number assigned after [Create Work Orders] is executed.
Line Item	Status	Select WO Status before [Create Work Orders] from the following choices: N New O Open R Released
Line Item	WO Type	Select the WO Type before [Create Work Orders] from the following choices. N Normal M Modified R Rework W Warranty
Line Item	Complete Type	Select the WO Complete Type before [Create Work Orders] from the following choices. Null Inventory I Inventory Complete C Cost of Goods

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Main Menu Options

Following is a brief description of the options available from the Main Menu of the Work Order Batch Creation application.

Menu	Option	Description
File	Clear	Clear all current data on all displays.
File	Create Work Orders	<i>See Main Menu procedures.</i>
File	Update WOBOM	<i>See Main Menu procedures.</i>
File	Print	Print the current active spreadsheet.
File	Export	Export data from the active spreadsheet.
File	Exit	Close the application
Edit	Copy	Copy data to the Windows clipboard.
Edit	Cut	Cut data from the field and copy it to the Windows clipboard.
Edit	Paste	Paste data from the Windows clipboard.
Edit	Fill	Update all of the selected cells from the Windows clipboard.
Edit	Zoom	View, print and/or edit the expanded contents of a field.
View	Adjust Columns to Fit Data	Automatically adjust column width to fit data.
View	Adjust Rows to Fit Data	Automatically adjust the height of each row to accommodate your data.
View	Adjust Spreads to Fit Data	Automatically adjust the height of each column and row to accommodate your data.
View	Reset Columns to Default Width	Reset Columns to the original default width.
View	Reset Rows to Default Height	Reset Rows to original default height.
View	Show Hidden	Show any columns that are hidden.

	Columns	
View	Arrange/Hide Columns	Arrange columns on spread and identify columns to be hidden.
Tools	Work Order Number Search	<i>See Work Order Number Search.</i>

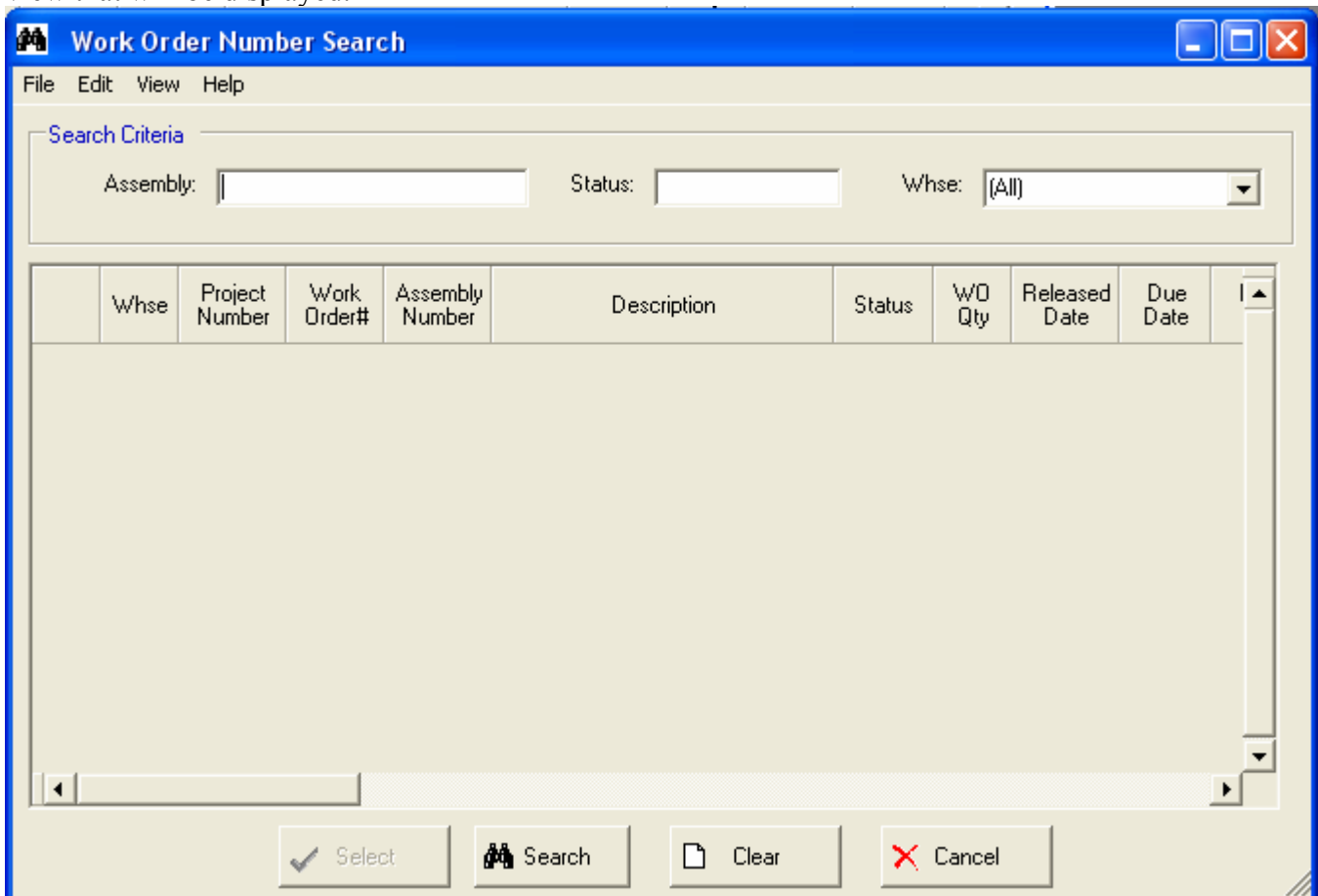
Right Click Menu

Copy	-	Copy data to the Windows clipboard.
Cut	-	Cut data from the field and copy it to the Windows clipboard.
Paste	-	Paste data from the Windows clipboard.
Fill	-	Update all of the selected cells from the Windows clipboard.
Select Column	-	Select column where cursor rests.
Select Row	-	Select row highlighted.
Arrange Column	-	Arrange columns on spread.

Tools Menu

Work Order Number Search

The Work Order Number Search may be launched from either the Tools Menu or by clicking the icon to the right of the Work Order entry field on the Work Order Batch Creation view. The following is the view that will be displayed.



Whse	Project Number	Work Order#	Assembly Number	Description	Status	WO Qty	Released Date	Due Date
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- ❑ There are three criteria by which you can narrow your search: Assembly, Status and Warehouse. If you only know a portion of the Assembly Number you may use Wildcarding to locate the item.
- ❑ Enter your criteria and click on the [Search] button. It will produce the following results.

Work Order Number Search

File Edit View Help

Search Criteria

Assembly: Status: Whse:

	Whse	Project Number	Work Order#	Assembly Number	Description	Status	W/O Qty	Released Date	Due Date	Issue Type	Cost Type
1	W1		2	XTR500	POWER DRIVE ASSY.	Pulled	100	08/30/06	09/01/0	Yes - Pick	Standard
2	W1		22	XTR500	POWER DRIVE ASSY.	New	10	09/12/06	09/13/0	No Picker	Standard
3	W1		23	XTR500	POWER DRIVE ASSY.	New	20	09/12/06	09/13/0	No Picker	Standard
4	W1		24	XTR500	POWER DRIVE ASSY.	Pulled	30	09/12/06	09/13/0	No Picker	Standard
5	W1		71	XTR500	POWER DRIVE ASSY.	New	10	09/12/06	09/13/0	No Picker	Standard
6	W1		73	XTR500	POWER DRIVE ASSY.	New	10	09/12/06	09/13/0	No Picker	Standard

Select Search Clear Cancel

- ❑ Place your cursor on the row you wish to drop into the Work Order Batch Creation screen and click on the [Select] button.

Column Field Descriptions

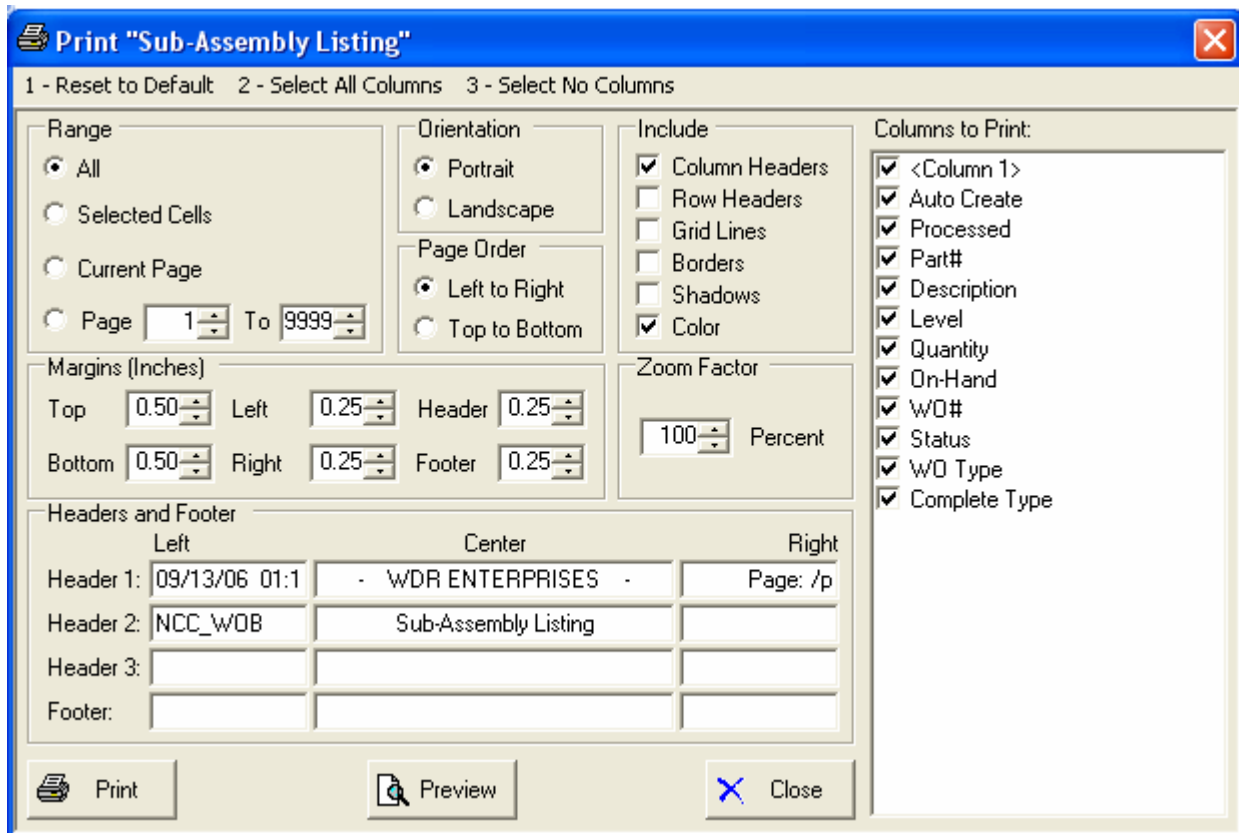
Whse	Warehouse Number.
Project Number	Project Number.
Work Order	Work Order Number
Assembly Number	Assembly Part Number
Description	Assembly Description
Status	Current Status of the Work Order: New Firm Planed Order Released

	Picked Backordered Completed Final
WO Qty	Work Order Quantity
Release Date	Date Work Order was Released.
Due Date	Date Work Order is Due
Issue Type	Issue Type for the Work Order Pick No Picker Backflush Manual
Cost Type	Cost Type for the Work Order Standard Project Expense

General Information

Printing a Spreadsheet

Below is a sample of the screen that will appear when you select the **Print** option. This will print the current active spreadsheet, so be sure to click on the spreadsheet you wish to print before choosing the Print option.



Range - Selecting a Print Range

You may choose to print the entire spreadsheet (all), selected cells (those that you have highlighted on the current screen), the current page (only the rows that are currently visible on your screen), or a range of page numbers.

Orientation - Portrait or Landscape

You may print your report in portrait mode (normal) or landscape mode (sideways). Printing in landscape mode will allow you to fit more columns of information on your report.

Margins - Report Margins

You can make your report more attractive by setting the top, bottom, left, and right margins. Reduce the left and right margins if you need to fit more columns on the report.

Page Order

If your report is too wide, it may span multiple pages. When this occurs, do you want the report printed from top to bottom or left to right?

What Do You Want to Print?

You can customize the appearance of your report by printing (or not printing) column headers, row headers, grid lines, borders, shadow, and color.

Headers and Footers

Your report may have up to three lines for the heading, and one line for the footer. The system initially displays a default heading, which you may modify if desired.

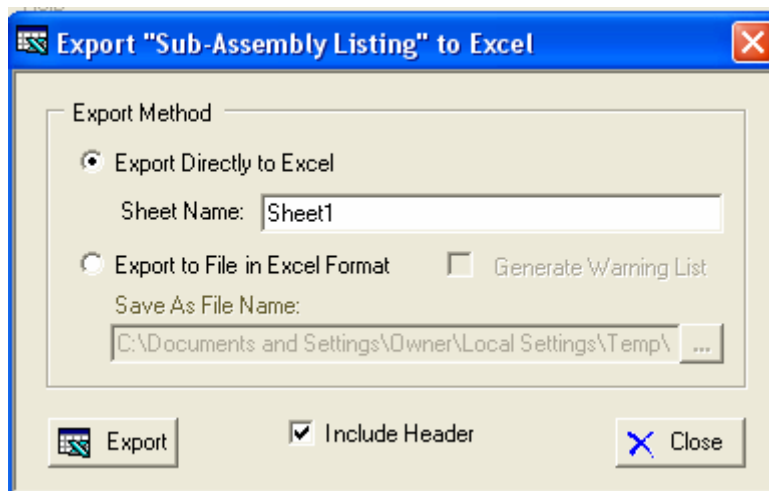
Tip: Use /p to designate a page number.

Which Columns Do You Want to Print?

The columns that are available for printing are listed. Select the columns you wish to include on your report.

Exporting a Spreadsheet to Excel

Below is a sample of the screen that will appear when you select the **Export to Excel** option. This will export the current active spreadsheet, so be sure to click on the spreadsheet you wish to print before choosing the Export option.



Save As File Name

Enter the pathname of the file you wish to create. You may Browse the files by clicking the button to locate the drive and folder where the file will be stored.

Sheet Name

Enter the Excel sheet name to create. This will automatically default to Sheet1.

Export to Excel or to a File?

You may export the contents of the display directly to Excel, or you may choose to create a file in Excel format.

Generate Warning List?

Select this option to create a log file. The log file contains error messages and other information about how your Excel file was created. The name of the log file is "CreateExcelFile.log", and it will be stored in the same folder as your spreadsheet.

Include Header?

Check if you want to include the Header.

[Export] Button

After all required information has been entered, click this button to export your data to Microsoft Excel.

Editing Features

Copy, Cut, Paste and Fill

You may use the standard Windows Copy, Cut, and Paste features to copy data to the Windows clipboard, or to paste data from the clipboard into a cell.

To copy data, hold down the left mouse button and highlight one or more cells, then choose **Copy**. There are multiple ways to enter this command:

1. From the **Edit** menu choose **Copy**.
2. Click the **Right Mouse** button, and then choose **Copy** from the pop-up menu.
3. Click the corresponding icon on the toolbar.
4. Hold down the **Ctrl** key and type the letter **C** (**Ctrl-C**).

You can use the Cut command (Ctrl-X) and the Paste command (Ctrl-V) in similar fashion.

To copy the contents of an entire row, click once on the row header (the number displayed on the left side of the first cell), and then choose **Copy**. Now click on the row header that you want to copy the data to and choose **Paste**.

If you want to update several cells with the same value, highlight all of the cells you wish to update then choose **Fill Cells**. This command will update each cell with the current information from the clipboard.

Zoom

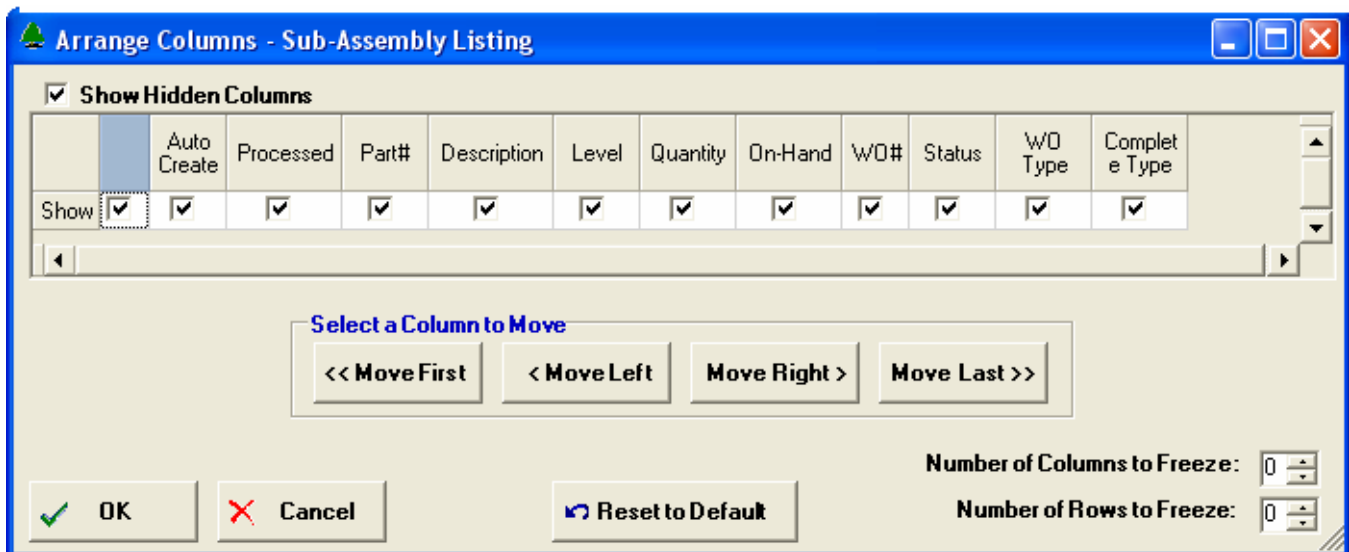
This feature allows you to view, print and/or edit the expanded contents of a field. It is especially useful for multi-line information such as notes and long descriptions.

- You may "Zoom in" on any selected item by selecting Zoom from the Edit Menu, clicking the magnifying glass on the toolbar, or selecting Zoom from the right click menu.
- The Column Name will appear in the Title Bar with "Edit" or "View". You may edit the field when it is allowed. Click "OK" when finished, or "Cancel" to revert to the original data.
- To print the selected item, click on the printer icon and the information will be sent to your local printer.

Locked fields may be viewed but not modified using the Zoom Feature. If the field is locked, "View" will appear in the Title Bar, and there will only be a single command button labeled "Done".

Arranging Columns

Use the Arrange/Hide Columns to change the sequence in which columns appear on your spreadsheet.



- ❑ Each column represents a field that is available for display on the spreadsheet. To hide a column remove the check from the box under the title heading.
- ❑ Use the [Move First], [Move Left], [Move Right] and [Move Last] Buttons to re-arrange the order in which the fields appear on the specific screen Display. Click [Reset to Default] to return to the system's default settings.
- ❑ Select the Number of Columns and Rows you wish to Freeze on the Display.
- ❑ Click [OK] to apply any changes you have made or [Cancel] to revert to the previous settings.

Note, these settings are stored in the Windows Registry for each user.

Wildcarding

Wildcarding is a powerful feature that allows you to search using a portion of the field. You tell the system you want to use a wildcard by typing three periods “...” or an asterisk “*” at the beginning or end of your search entry. Here are some examples of wildcard commands and their expected results:

Part Number:	XTR... (or XTR*)	Returns part numbers that begin with “XTR”
Description:	...VALVE... (or *VALVE*)	Returns parts with the word “VALVE” anywhere in the description.
Category:	...A (or *A)	Returns parts with a category ending with the letter “A”.