Kinetic Job Management User Guide

Version 2025.1

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Job Management

The **Job Management** module contains the central application functions for manufacturing processes. The **Job Entry** app pulls information from sales orders, purchase orders, inventory, and other sources into its core component – the job record. You then assign each job record a method of manufacturing. This method in turn defines the job's schedule for its production within your company's manufacturing center.

To help you create jobs, two key tools are available – the **Job Manager** app and the **Planning Workbench** app. Use the 'Job Manager' app to review the demand for a part and then answer this demand by creating jobs. Use the 'Planning Workbench' app to evaluate suggestions made to the manufacturing center through sales orders, other jobs, and inventory requests. You can then create the jobs you need.

As a job's operations are worked on by shop employees, labor is recorded against these operations, so you can precisely track labor costs. Use the **Job Tracker** app to accurately review the current real time status of any job. At any point in the process, you can review a job through three key reports – the **Job Traveler**, **Production Detail**, and **Time Phased Material Requirements** report apps. Each report helps your supervisors manage job production from operation to operation.

You then finish the production cycle by indicating when production is complete and when the job is finally finished, or closed. The part quantity can then be shipped to your customers, completing the job management process.

Job Types

To help you organize jobs, four categories or types of jobs are available. Each category automatically defines the specific need or purpose for the job, and indicates how the job is expensed. The type is assigned immediately when you create a new job, and depends on the module where launched the 'Job Entry' app. For example, a 'Maintenance' job is created when you launch the 'Maintenance Job Entry' app using the 'Maintenance Management' module.

You can use job types as a filter for searches to pull in the specific job you want to review. Available job types include:

- **Service** – Use this job type for jobs created for field service orders.
- **Maintenance** – Use this job type for jobs created to record maintenance tasks on equipment.
- **Project** – Use this job type for jobs created to complete Work Breakdown Structure (WBS) phases within a project.
- **Manufacturing** – Use this job type for jobs created to assemble a part quantity required to satisfy one or more demand links.

You can review all job types in Job Entry; however, you cannot create all job types through this app. For example, maintenance jobs must be created through the 'Maintenance Job Entry' app.

Setup

Most of the records required for the Job Management module are set up in other modules. However, you have additional parameters you can define within Company Configuration. For more information on these parameters, review application help for this module; the Configuration topic details the options you define within Company Configuration.

Operations

This section details the operations available through The Job Management module. Each operation is described as a workflow to help guide you through the process from start to finish. These applications are primarily found within the General Operations folder for this module. If a unique setup record is required to run the operation, this is also described in this section.

Creating Jobs

Each manufactured part you produce needs a job. You can manufacture parts for your inventory, or you can ship the completed items directly to customers from a production floor (non-stock items). It does not matter what items you manufacture, you always need a job.

Each job you enter in Kinetic needs a method of manufacture (MOM). You can define MOM at '3' different levels.

a. Quote Entry

b. Engineering Workbench

c. Job Entry

Each method includes a bill of materials (BOM) and bill of operations (BOO). A job is available for production only if you set it to 'Released'.

This article goes through entering a job and explains the necessary settings required to successfully enter a job.

As you go through the article and review different pages/cards, you will come across the 'Attribute Set' reference.

Generating a Job Number

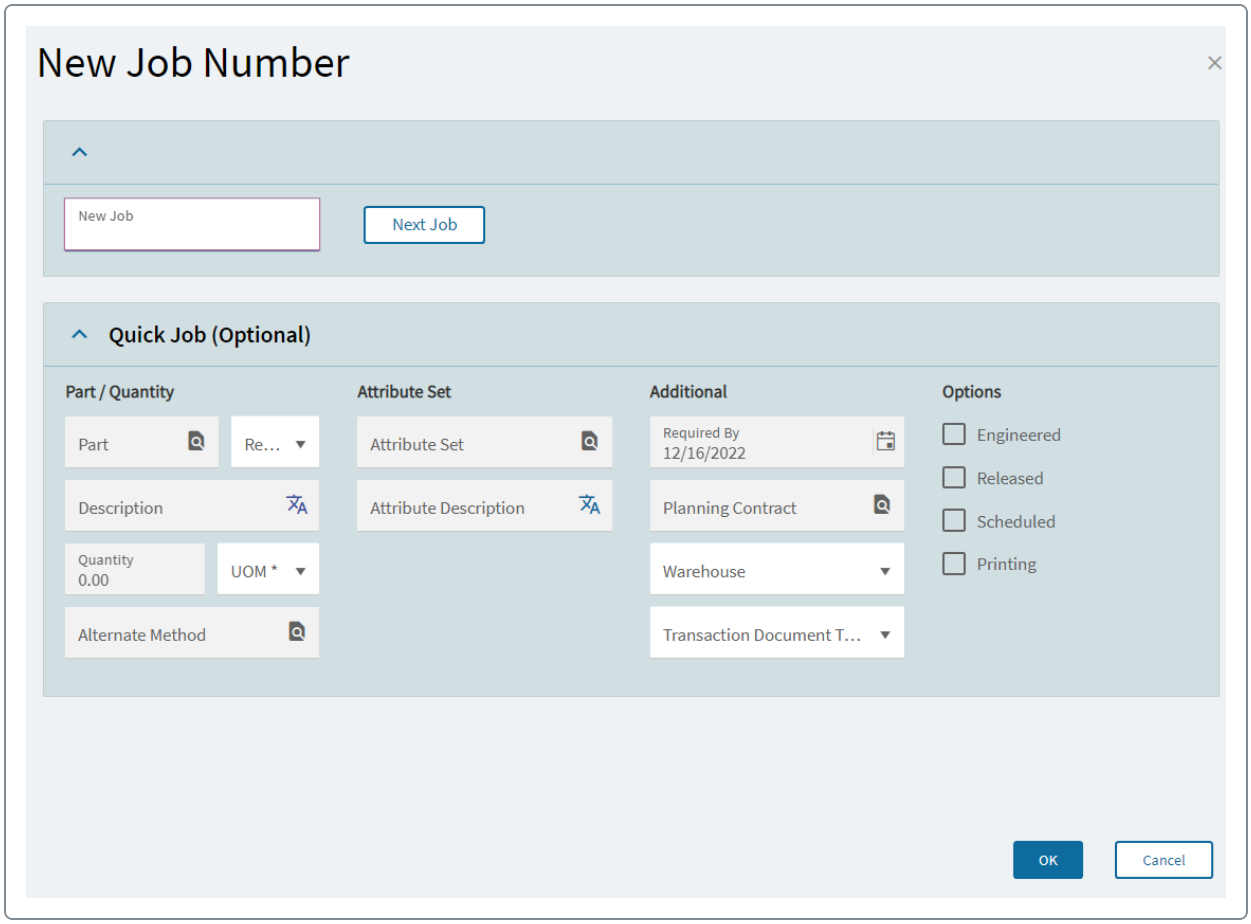
First, have Kinetic to generate a new job number.

1. Open the **Job Entry** app.

   The Landing page displays. Using the page you can select any of the existing jobs by click on the job number link located in the grid. However, since you are going to create a new job, this is not necessary.

2. Select **New Job**. 

   The **New Job Number** panel opens.



Using the panel, you can also enter a job using 'Quick Job Entry', where you create, engineer, schedule, and release a job through one window.

3. Inside the panel, select the **Next Job** button.

   Kinetic generates a job number.

4. Select **OK**.

   The **Job** card displays.

Do not select 'Save', since we do not yet know the item the job is manufacturing.

Entering Primary Job Information

Kinetic has generated a new job number, but you still need to tell it what is it that you are going to manufacture.

1. In the **Job/Part** group box, enter a part number in the **Part** field and press **Tab**.

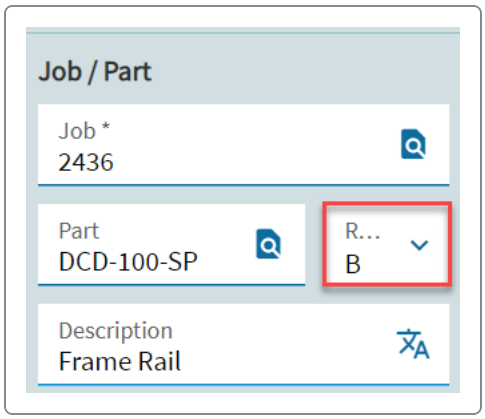
   You can also search for the part using the 'Search' icon located inside the 'Part' field.

   > If the item that you want to make is not part of your database (part-on-the-fly) then define the part number in this field. You have to enter part's description as well. This means that you will be entering a method of manufacture directly in the 'Job Entry' app. In this case, you probably will not manufacture this part again (a one off part).

2. In the **Revision** field, select a revision you want to make.

   Each part can hold multiple revisions. A revision in Kinetic holds a method of manufacture (Bill of Operations & Bill of Materials). You can have a single part that it manufactured using two different ways.

   The 'Revision' field is located next to the Part field.

3. In the **Dates** group box, select a date in the **Required By** field.

   For example, assume the job needs to be ready in two weeks time. As a result, you enter a date that is two weeks from today. However, this is just when you need the job to be completed. Once you schedule the job Kinetic, the system determines when the job will start and complete. This depends one many factors such as material lead time, operation standards, resource availability, and so on.

4. Select **Save**.

   You can save a job when you enter a part that you are going to make and define a date when you need the job to be done. These are two prerequisites for saving a job. You will review the 'Start' and 'Final Operation' date fields later when you schedule the job.

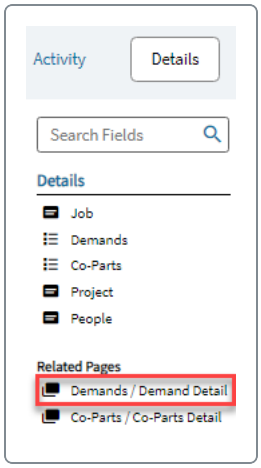
Entering Demand Links

Next, enter a demand link to indicate the purpose of the job.

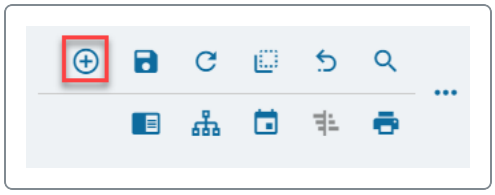
- Are you going to make this part for your inventory? (Make To Stock)
- Is this is a non-stock part that will be shipped directly from production? (Make To Order)
- Do you need to make this part as it is needed as a material on another job? (Make To Job)

1. In the **Job Entry** app, in the Nav tree, select the **Demands / Demand Detail** node.

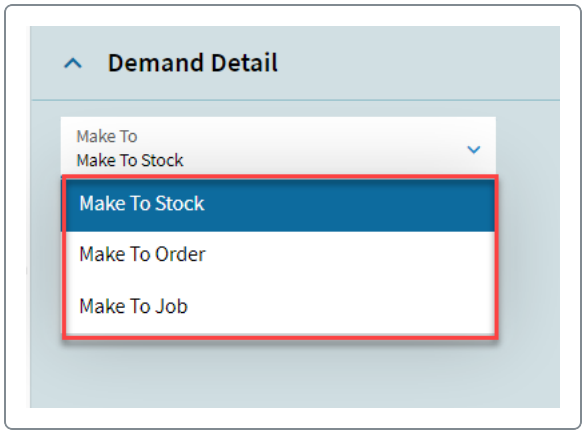
   The **Demand Detail** card displays.



2. Select **New Demand**.



3. In the **Make To** field, select a demand link.

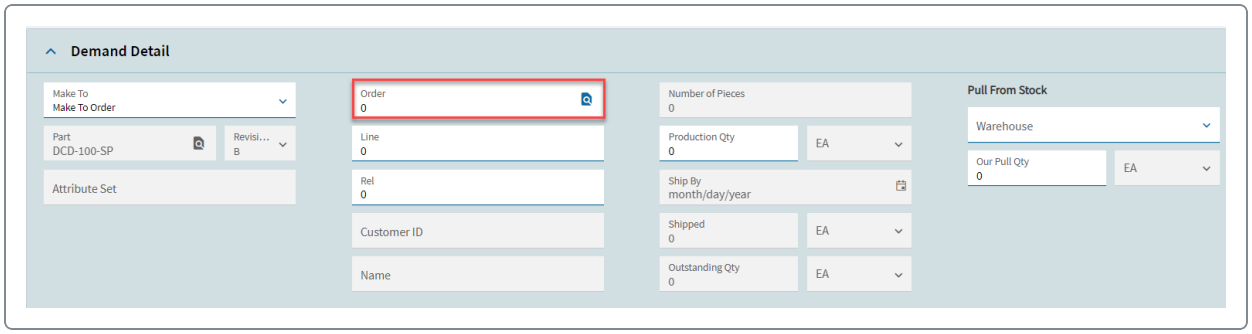


Make to Order

If you have a sales order that the job needs to satisfy (Make Direct) then select the 'Make To Order > Detail' node in the Nav tree. To make a new demand link, select **New Make To Order** and fill in the sales order number, line, and release.

Normally, the quantity defined on a sales order line should be in sync with the production quantity value you enter in the 'Production Qty' field. However, if you have the quantity in your inventory, or partial quantity, then you can select a warehouse and enter the 'Our Pull Qty' value using the fields located in the 'Pull From Stock' group box.

For example, assume one of your customers placed an order for '10' units of part 'A'. This is a non-stock manufactured (Make Direct) part. As a result, you enter a new job and create the 'Make To Order' demand link, where you enter a sales order the customer placed.

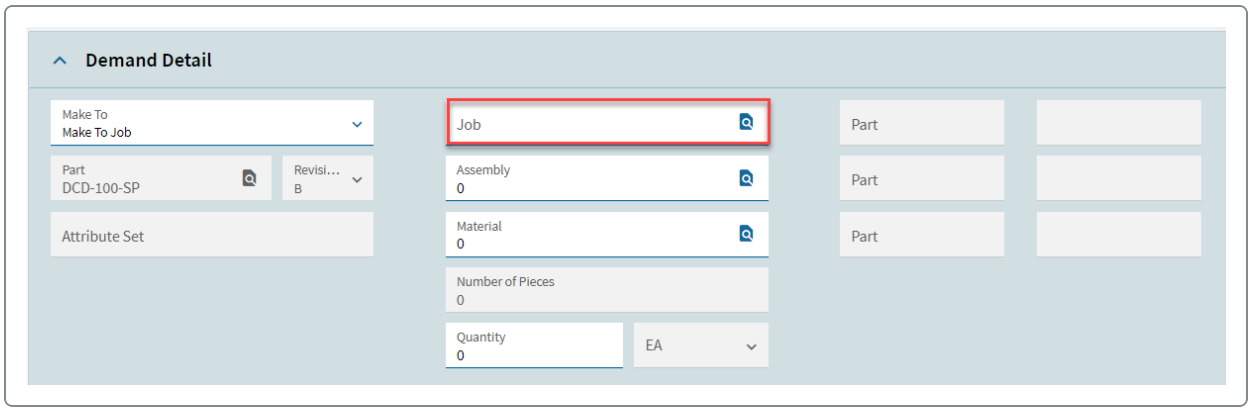


Make to Job

If you have a job that needs this part as a result of its method of manufacture (material requirement) then you would enter the 'Make To Job' demand link. To make a new demand link, select **New Make To Job** and fill in the job, assembly, and material values.

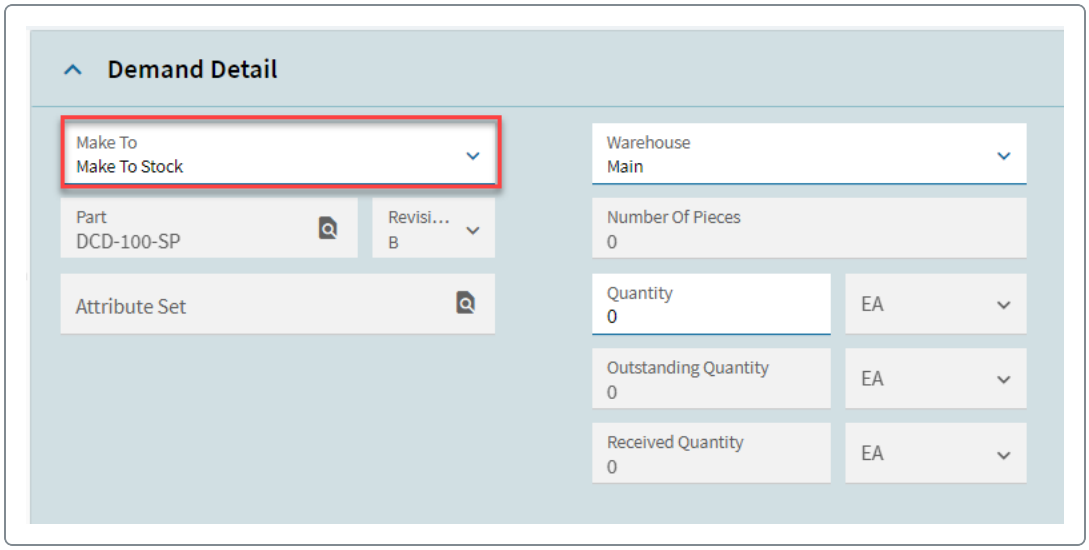
For example, assume one of your customers placed an order for '10' units of part 'A'. This is a non-stock manufactured (Make Direct) part. However, part 'A' needs part 'B' in its method of

manufacture. Part 'B' is a manufactured item that you need to make in order to manufacture part 'A'. As a result, you enter a new job to produce part 'B' and another job for part 'A'. When you create a job for part 'B', you define the 'Make To Job' demand link, where you specify a job number for part 'A'. Next, you complete manufacturing of part 'B' and receive to the job for part 'A' using the 'Job Receipt to Job' app.

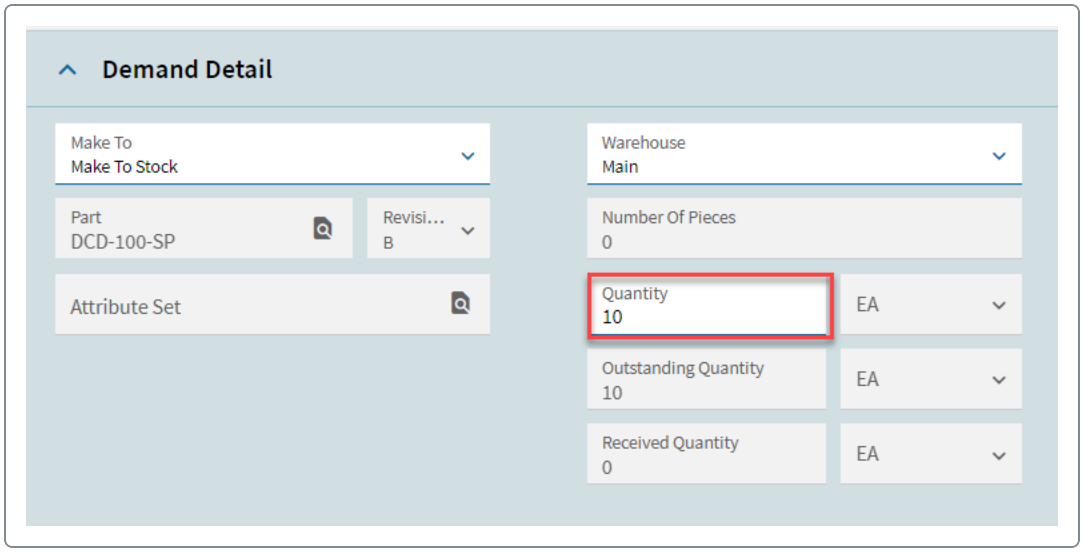


4. On the **Demand Detail** card, in the **Make To** field, select **Make To Stock**.

   This example uses part 'DCD-100-SP'.



5. In the **Quantity** field, enter the quantity you want to make.



In this case, we enter'10' units.

6. Normally, you ship the items from stock once you receive them to your warehouse bin. However, if you wan to ship the items directly from production then select the **Misc Shipment from WIP** check box.

7. Select **Save**.

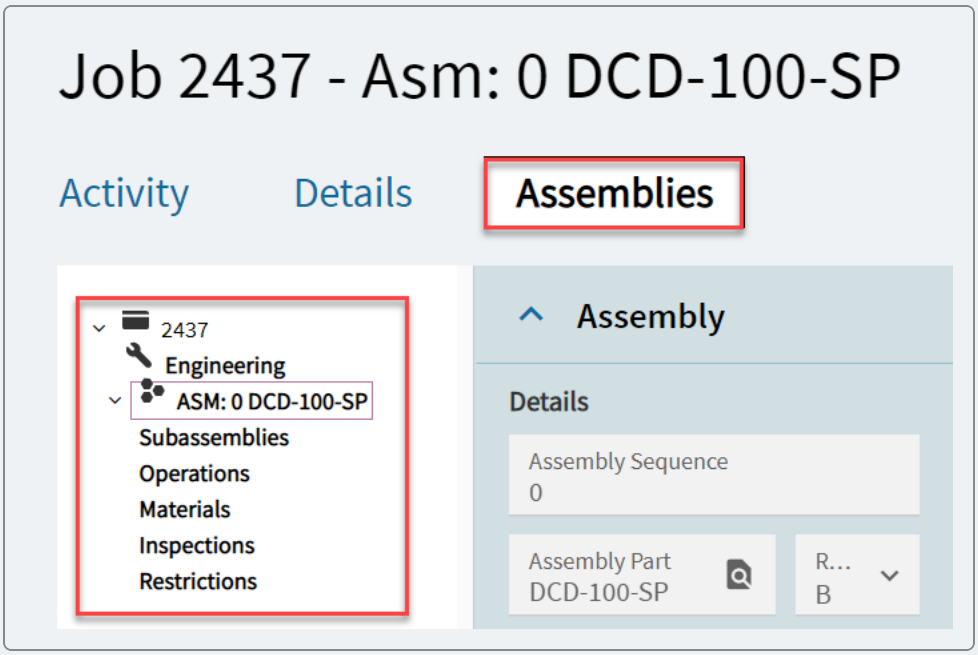
Defining Method of Manufacture

Next, pull in the manufacture details (Bill of Operations/Bill of Materials). When you enter a job, you can pull in the method created for a specific revision in the 'Engineering Workbench' app or you can create a method directly in the 'Job Entry' app. For instance, if you are going to manufacture a part-on-the-fly then you would create a method manually rather than have it linked to a specific revision.

- A bill of operations, or routing, defines the various tasks that need to be run to manufacture the part. This defines the sequence of manufacturing and assembly operations required to build the final product.
- A bill of materials specifies the materials required to complete the part; this includes all purchased and manufactured components.

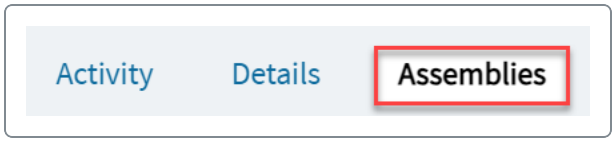
In this example, you pull in the already defined method of manufacture.

In the 'Job Entry' app, you define a method on the 'Assemblies' page.



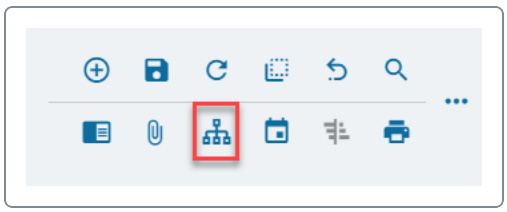
1. Select the **Assemblies** page.

   The **Assembly** card displays.



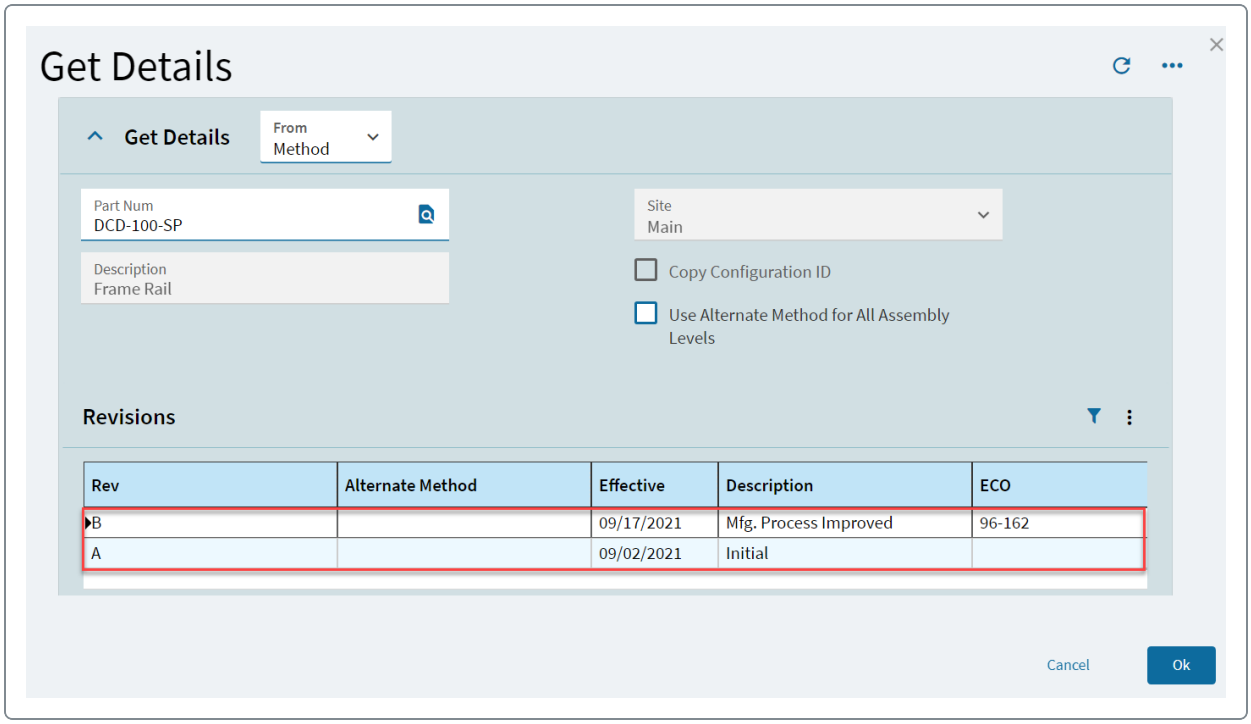
2. Select **Get Details**.

   The **Get Details** panel opens.

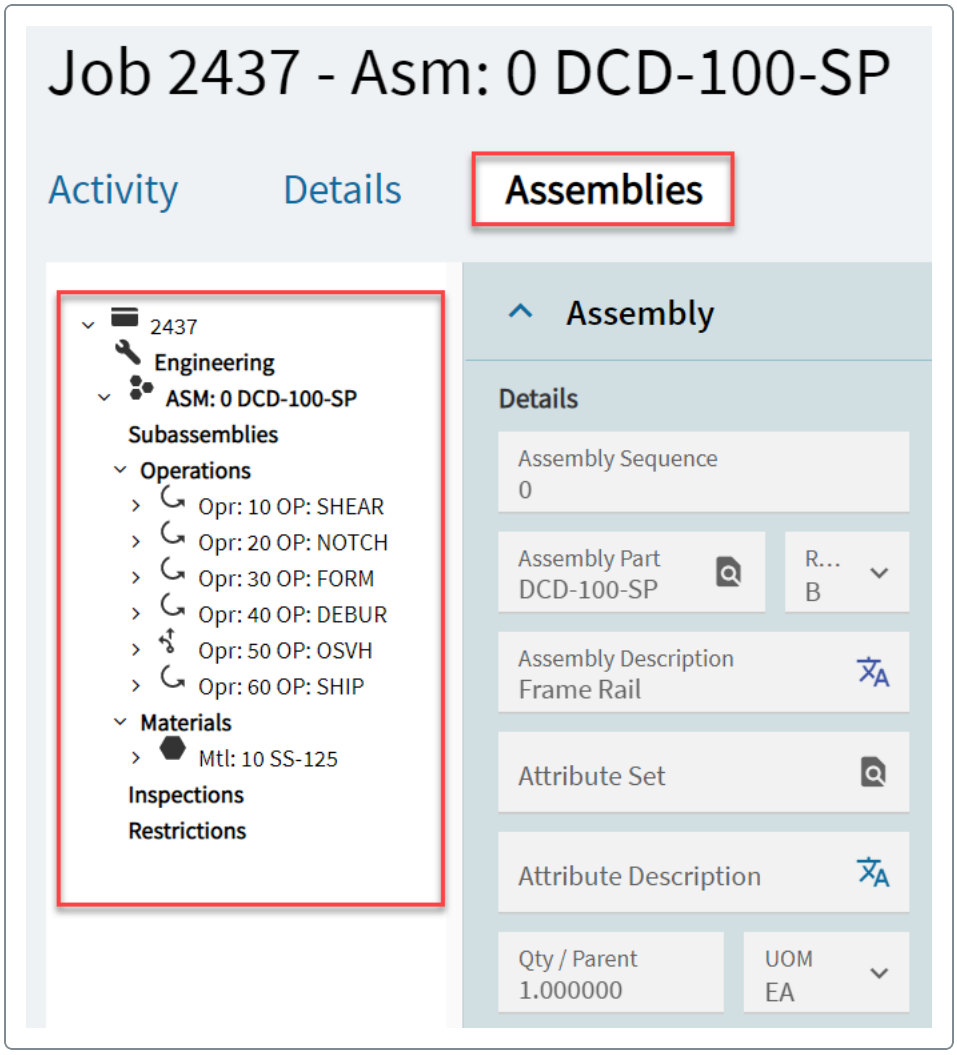


3. Review the panel.

   In this example, we are using part 'DCD-100-SP'. The part holds '2' revisions. Depending on what revision you select, the method of manufacture tied to the revision is pull into your job.



4. Inside the panel, select a revision by highlighting the grid line and select **OK**.
5. Next, fully expand the Nav tree.



6. Review the method of manufacture.

   In this example, we used part 'DCD-100-SP'. The method of manufacture for the part holds '6' operations and a single material. One of the operations, operation '50', is a subcontract operation.

7. Select **Save**.

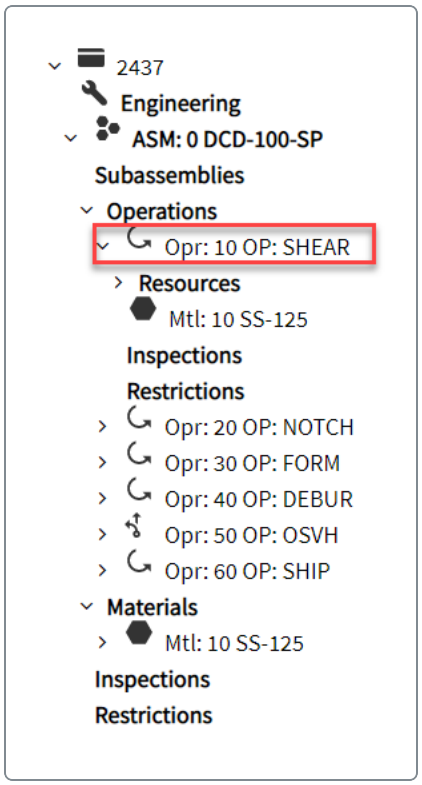
Reviewing Operations

Next, review the job's operations.

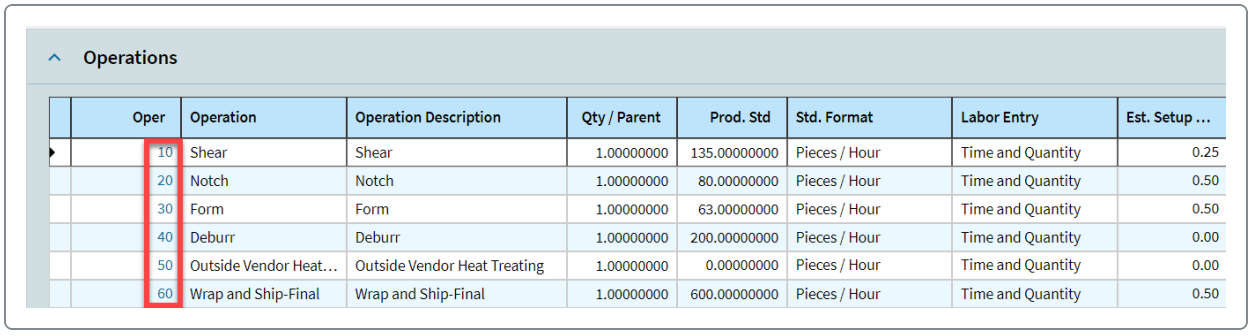
Again, if you want to learn how to create a method of manufacture manually, refer to the article. Inside the article, locate the 'Adding Operations' topic.

1. In the Nav tree, click on the first listed operation.

   The **Operation** card displays.



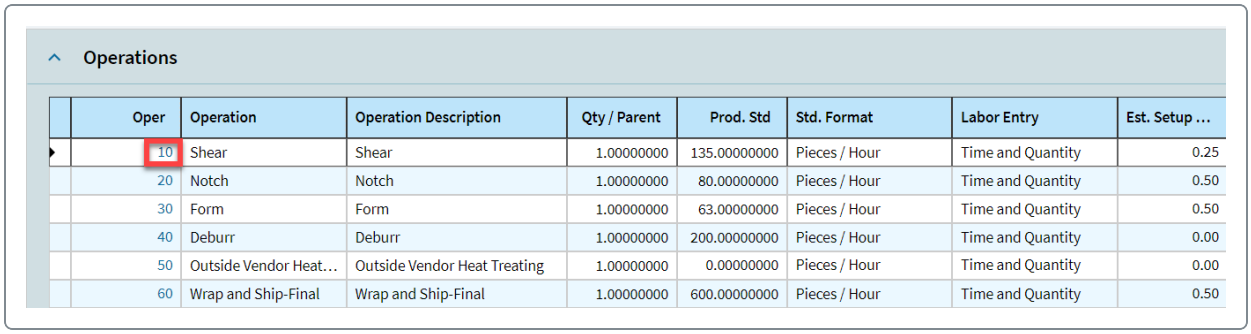
   When you select the 'Operations' node, the 'Job Entry' app displays all the operations the job includes.



Operations

Oper	Operation	Operation Description	Qty / Parent	Prod. Std	Std. Format	Labor Entry	Est. Setup ...
10	Shear	Shear	1.00000000	135.00000000	Pieces / Hour	Time and Quantity	0.25
20	Notch	Notch	1.00000000	80.00000000	Pieces / Hour	Time and Quantity	0.50
30	Form	Form	1.00000000	63.00000000	Pieces / Hour	Time and Quantity	0.50
40	Deburr	Deburr	1.00000000	200.00000000	Pieces / Hour	Time and Quantity	0.00
50	Outside Vendor Heat...	Outside Vendor Heat Treating	1.00000000	0.00000000	Pieces / Hour	Time and Quantity	0.00
60	Wrap and Ship-Final	Wrap and Ship-Final	1.00000000	600.00000000	Pieces / Hour	Time and Quantity	0.50

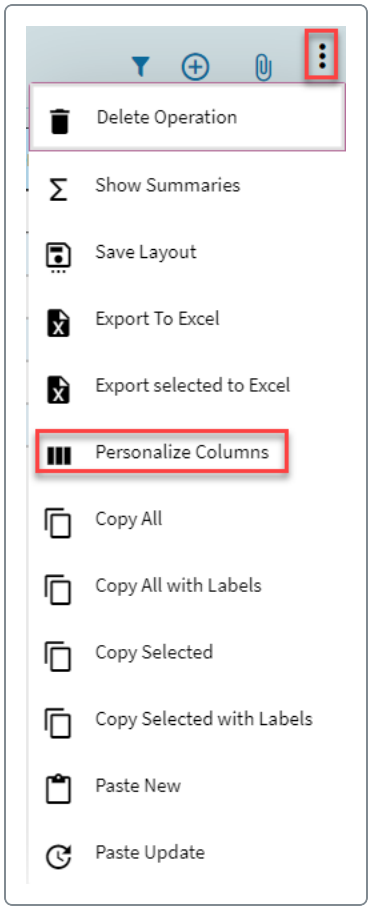
   To review/modify a particular operation, you can also select the operation link. This is instead of using the Nav tree.



The card can also display different costing information depending how you personalize columns. To do so:

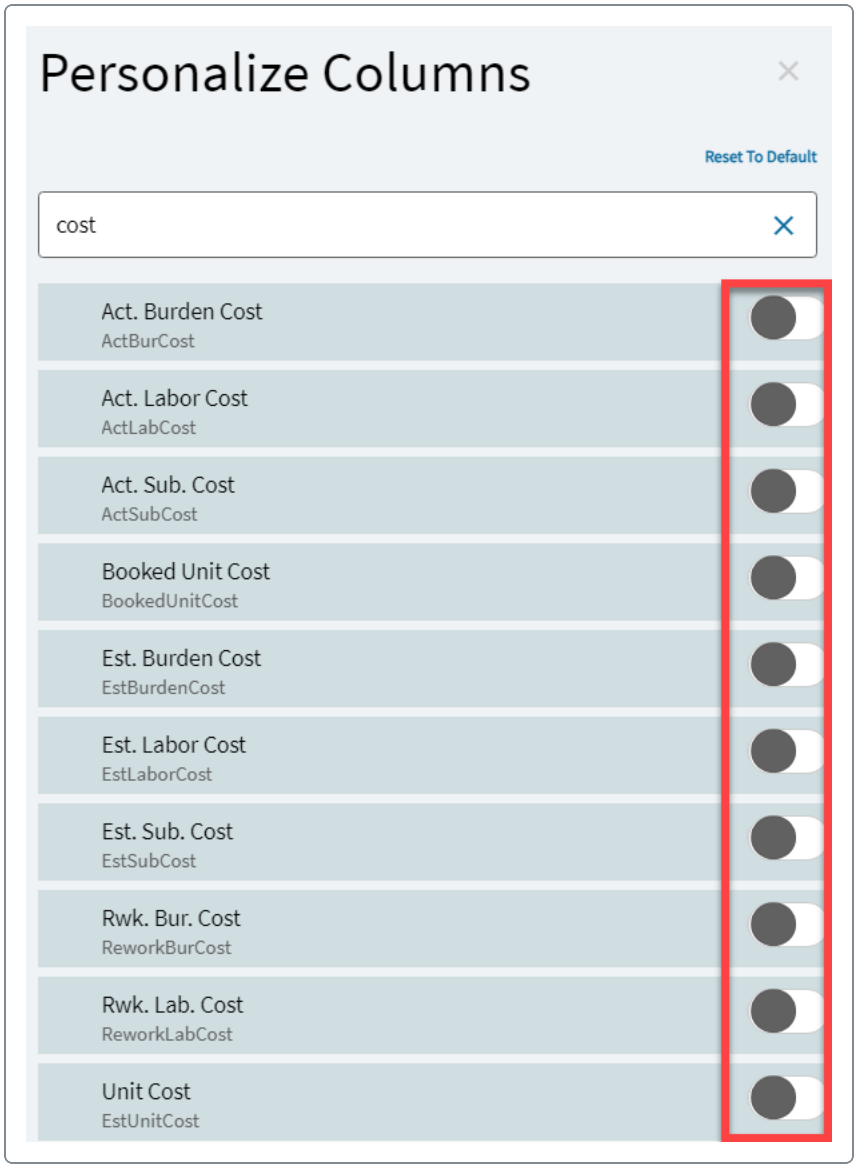
1. Select **Personalize Columns** from the **Overflow** menu.

   The **Personalize Panel** opens.



2. In the **Search** field, enter **cost**.

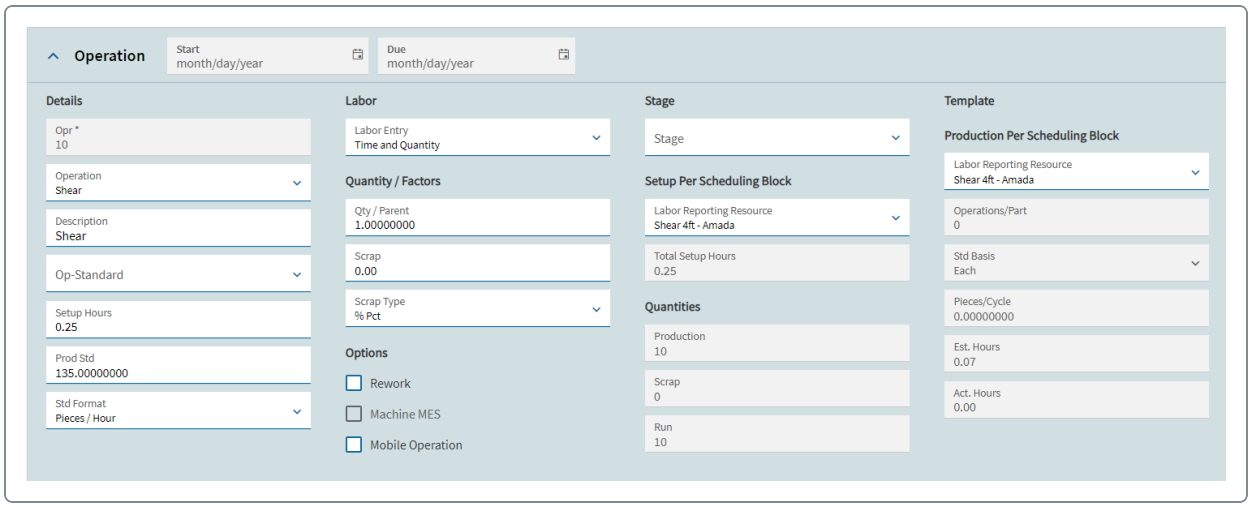
3. Active different **Cost** fields as required by moving the toggle button to the right.



4. Finally, select the **Save** button inside the panel.

2. Review the card.

   The card displays the operation settings relevant to the selected operation. In this case, we use the 'Shear' operation.



   The fields include:

   - **Qty/Parent** - Specifies the operation quantity required to make one base unit of the parent assembly part. The default value is 1. This value is multiplied by the assembly production quantity to calculate the operation Production Qty.

     Operation Production Quantity = Qty/Parent x Assembly Production Quantity

     The Qty/Parent is 1 for many operations. If you do not have assemblies, this is the quantity required to manufacture 1 of the end part. It can be greater than 1 if you work with multiple assemblies.

     The quantity (whole, or fractional with decimals) that can be entered in this field, and the number of allowed decimal places, is dependent on the setting of the **Allow Decimals** and **Decimals** fields in the UOM Maintenance app for the selected UOM code.

     After entering the price, select the UOM code that represents the unit of measure (for example, Each, Case, Cubic Centimeters) in which the quantity is being expressed. The default is the base UOM code defined for the job material part in the Primary UOMs - Inventory field in the Part app.

     > If you are making a car with 4 doors, the operations involved with making the doors would have a Qty/Parent of 4, since there are 4 doors for each car.

Note also that you can enter 0 (zero) quantity for a material. Do this if you need to add a reference material to the BOM that may or may not be used during the manufacturing process. You can also do this if you need to change a material on a BOM; set the original material's Qty/Parent to 0 and add a new material.

If Qty/Parent is equal to 0:

- You can issue inventory to this material if the production worker uses it, using either the **Issue Material** or **Mass Issue** apps, by manually entering the amount used.
- Materials with a value of 0 in the Qty/Parent field are depicted on a tree field with a special icon. If no materials are issued, the icon is blue. If materials have been issued, the icon is green.
- It is skipped in backflush and no material is issued for it.
- In Job Actual Costing and Costing Workbench, Estimated Costs uses 0.00.

If you select Pull as Assembly or Plan as Assembly, you cannot enter a zero quantity material.

- **Scrap** - This is the scrap quantity factor. This value can either be a defined quantity or a percentage, depending upon which radio button, quantity or percentage, you select. Enter the scrap factor that is required for this operation. For example:

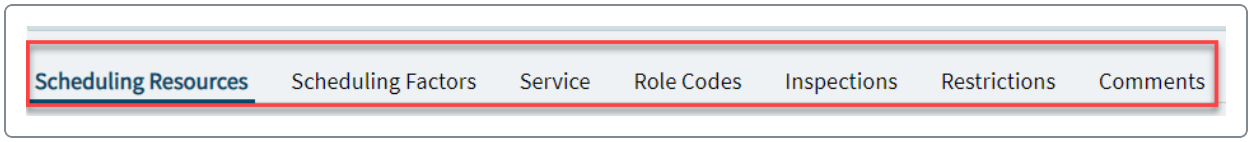
  The Scrap Quantity is calculated in two ways:

  - *Scrap Quantity = The scrap quantity that is entered in this field*
  - *Scrap Quantity = Scrap Percentage X the Production Quantity*
- **Setup Hours** - Specifies the estimated hours it will take to set up this operation. This value is entered in a decimal format. If this operation has an operation standard, this standard's value displays by default, but you can also change the setup hours.
- **Production Standard** - Specifies the estimated production rate for this operation. If an operation standard is selected, the default production standard displays here. The standard is used to calculate the total estimated production hours for this operation.

  The number you enter depends on the standard format you select. It can be a number of pieces, hours, minutes, or operations.

If you select the Machine DC check box, the production rate must be expressed in cycles per hour or cycles per minute. Only Cycles/Minute or Cycles/Hour can be selected in the Production Standard Format field.

3. The **Operation** card also includes **7** sub-cards.



4. Select the **Scheduling Resources** card.

   The card lists a number of resources linked to the operation. In Kinetic, each operation is linked to a resource group and each resource group holds resources. You create resources and resource groups using the 'Resource Group Entry' app. You create operations using the 'Operation' app. You can add additional resource(s) here using 'New Resource'.

   > To learn how to create resource groups and resources, review the article.
   >
   > To learn about how to create an operation, review the article.

5. Select the **Scheduling Factors** card.

   The scheduling values you enter indicate how the job is scheduled. You must schedule each job you enter before you release it. The 'Scheduling' engine calculates the 'Start' and 'Final Operation' dates so you know whether the job will meet the required date.

   Important fields:

   - **Scheduling Blocks** - Specifies the number of resources a single job operation requires. This is normally 1. Do not enter more than 1 unless you typically set up more than 1 resource for the same operation on the same job.

     If you enter more than 1, operations scheduled in its resource group will use more of the available. The scheduling engine will divide the production time by the number of scheduling blocks. The engine then finds resources that have capacity available in the required time frame. If there is enough capacity, the operation's total time can be reduced.

     > A resource group with 4 resources at 8 hours per day has a production capacity of 32 hours and a of 8 hours. If you enter a 2 here, a single operation will be for 16 hours in a day (using 2 resources) instead of just 8.

   - **Start-To-Start** - Kinetic schedules one operation to start as soon as the previous operation begins. Only active if the production standard is set to Operations/Hour or Operations/Minute.

   - **Finish-To-Start** - Kinetic schedules one operation to begin as soon as the previous operation ends.

The first operation on each assembly is always treated as finish-to-start. The operation Start Date is based on the Due Date from the last operation on a previous assembly.

- **Finish-To-Finish** - Kinetic schedules one operation to finish at the same time that a previous operation finishes.
- **Send Ahead Type** - Defines what scheduling offset value will be used for the operation that runs after this current operation when these operations share a Start-to-Start relationship. Use this functionality when finished quantities on the current operation can be advanced to the next operation before the current operation is complete. This generates a schedule that more accurately reflects your manufacturing process. You indicate on each site whether the Send Ahead Offset calculation starts from either the operation's Setup Time or Production Time.

  When you use this functionality, the following operation in a Start-to-Start relationship is scheduled to begin using the value you enter in the Send Ahead Offset field. Select an option on the Send Ahead Type drop-down list to determine how this value will be measured during the scheduling process. You can send ahead a quantity using the following types:

  - **Hours** - A set period of time.
  - **Pieces** - A number of completed parts.
  - **Percentage** - A percentage of the operation duration that is complete.

  After you select the type, you can then enter the value you will use within the Send Ahead Offset field.

- **Send Ahead Offset** - Defines the value used during scheduling to calculate when parts from this current operation can be moved on to the next operation. These operations must share a Start-to-Start relationship. Use this functionality when finished quantities on the current operation can be advanced to the next operation before the current operation is complete. This generates a schedule that more accurately reflects your manufacturing process. You indicate on each site whether the Send Ahead Offset calculation starts from either the operation's Setup Time or Production Time.

  You first define how the Send Ahead Offset value will be calculated using the Send Ahead Type drop-down list. You can send ahead a quantity based on Hours (elapsed time), Pieces (number of finished pieces), and Percentage Complete (a percentage of the operation duration). After you select a type, enter the Send Ahead Offset value you need in this field.

- **First Article Quantity** - Specifies the quantity from this operation that you want to submit to Inspection Processing. The quantity you enter here will be inspected when it is

complete.

To calculate an amount for this numeric field, right-click in the field, and from the context menu, select Calculator.

- **Final Operation** - When selected, this check box indicates that this operation will be used to calculate the job completion quantity.

  Only one operation on any assembly can be selected as the final operation. If you do not select a final operation, the last sequential operation on the assembly is used as the final operation.

  The job **Quantity Completed** value is used on various reports and displays throughout Kinetic. This quantity is equal to the labor quantity reported to-date against the final operation.

  > The Final Operation check box also displays for operations in the Quote Entry app. This check box setting will also be copied if you create jobs using the manufacturing details from either quotes or methods of manufacturing. This checkbox is automatically checked if the job is automatically created as part of a project. As a result, the job does not have to be opened for the purpose of closing this operation.

- **Setup Group** - Specifies the group used to sort schedules on the Scheduling Board. Each group is assigned a precedence value; the higher the group's value, the more precedence this operation will have during scheduling. Select the setup group you need from the list.

- **Auto Receive** - Indicates whether labor or receipt transactions against this operation will create automatic receipts to inventory. If you use this feature, this receipt updates the quantity on hand on the part record. The process is triggered when you post labor quantities against this operation that exceed the quantities required for the sales order. This checkbox is automatically selected if the job is created as part of a project. As a result, the job does not have to be opened for the purpose of closing this operation.

  Normally, you will select this check box for the last operation on the assembly or the final assembly. Parts are received to inventory at the current unit cost, based on the part costing method (average, standard or last).

  > For example, you enter job 12345 to make Widgets, linked to a sales order quantity of 75 and an additional stock quantity of 25. The last operation is selected for Auto Receive. If you report a labor quantity of 110 pieces against that operation, 35 pieces are received to inventory. This is calculated by subtracting the sales order’s 75 quantity from the 110 quantity that was manufactured through the operation.

The following rules apply:

- You cannot use the Auto Receive function on an intersite job. If you attempt to select the check box on such a job, an error message displays.
- This check box is not available on service jobs, or if the **Track Multiple UOMs** check box is selected in the Part app on the record for the manufactured part.
- You can automatically receive to stock a serial-tracked part on any job operation.
- If legal numbers are used for the transaction type and a legal number has not been assigned, the legal number automatically generates during the auto receive process. The process first looks for the first active legal number configuration (alphabetically) that has a generation type of Automatic and has a selected WIP to WIP or WIP to Stock Transaction Document Type marked as System Default for the transaction type. If the process cannot locate a legal number configuration that meets the first set of criteria, the process looks for the first active legal number configuration (alphabetically) that has a Generation Type of Automatic and has a selected WIP to WIP or WIP to Stock transaction document type. If the process cannot locate an active, automatically generated legal number configuration number for a WIP to WIP or WIP to Stock transaction document type, no legal number is generated.

- **Serial Numbers Required From This Operation** - Triggers a prompt in the End Labor Activity and Labor Entry app for the serial numbers produced from this operation when you select this check box. Selecting this check box also automatically selects the **Serial Number Required when Shipping** option in the Engineering Workbench app.

6. Select the **Service** card.

   The **Service** card is active if the current job is a service job. Use this card to add and edit the estimated labor costs for each operation that is needed to complete a service call. This lets you track the operation costs of the service call.

   After the actual operation costs are posted against the job, you can then compare these costs against the estimated operation costs you entered on this card.

   - **Call** – The unique identifier for the service call. You cannot edit this field; it is only displayed for your information.
   - **Line** – The call line used to define the service request. You cannot edit this field; it is only displayed for your information.
   - **Billable** – Indicates that this operation service call is billable. Whether or not this check box is automatically selected depends upon the call line. If the call line has a service contract, it is billable; if the call line has a warranty for the operation, it is not billable.
   - **Service Rate** – The hourly rate charged for this service.

7. Select the **Role Codes** card.

Use this card to activate different roles. For example, 'Builder', 'Buyer', 'Consulting', and so on.

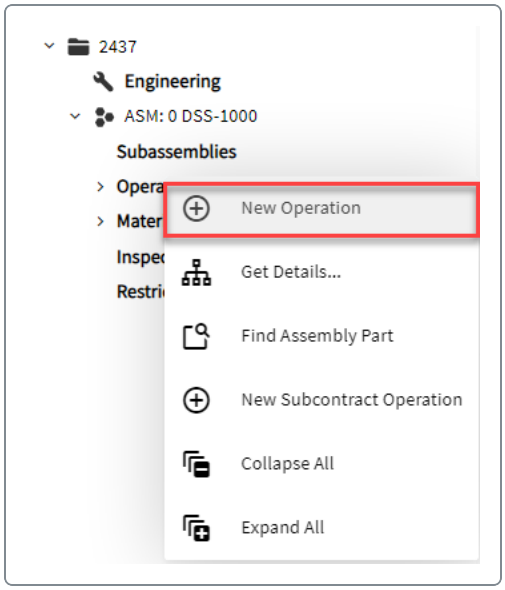
8. Select the **Inspections** card.

   If this operation requires inspection, you can link it to an inspection plan by selecting the **New Operation Inspection** button on the card.

9. Select the **Restrictions** card if you want to add a restriction type code to it. For example, the 'Restriction of Hazardous Substances' (RoHZ) code.

10. Finally, you can add a comment for each operation if required.

11. You can also add a new operation. This is if you are entering a new **Method of Manufacture** or you want to modify an existing one. To do so, right-click the **Operations** node in the Nav tree and select **New Operation**.



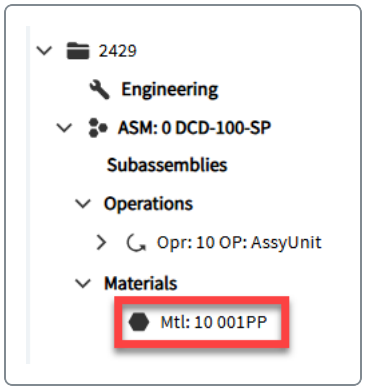
Reviewing Materials

Next, review the job's materials.

> If you want to learn how to create a method of manufacture manually, refer to the article. Inside the article, locate the 'Adding Materials' topic.

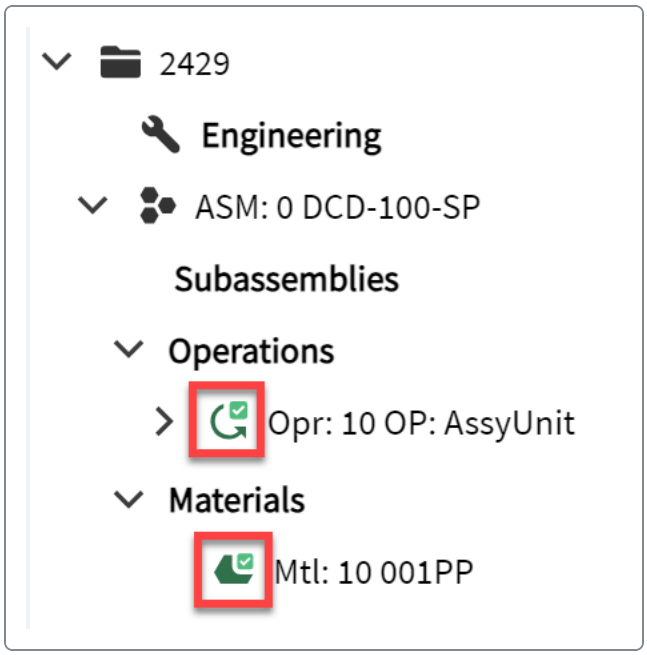
1. In the Nav tree, click on the first listed material.

   The **Material** card displays.



In this case, we selected material that has not been issued and the operation has not been completed.

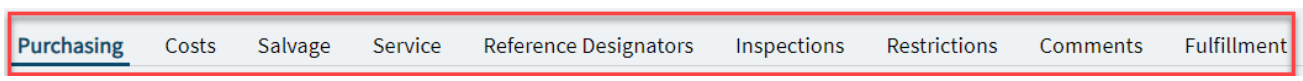
However, assume you issue the material and complete the job operation. If you do, then the Nav tree displays the following icons:



2. Review the card.

   The card displays the material settings relevant to the selected material. In this case, we use the '001PP' material as an example.

   The card also includes '9' sub-cards.



- **Qty/Parent** - Specifies the quantity of the material required to produce one base unit of the parent item.

  You must enter a value in this field.

  - If this material requirement has a fixed quantity, independent of the production quantity, enter the fixed quantity, and select the **Fixed Qty** check box.
  - If you select the **Pull as Assembly** or **Plan as Assembly** check boxes, you cannot enter a zero quantity in his field.
  - Kinetic multiplies this quantity by the assembly Qty/Parent to generate material quantities required for each quantity quoted or produced.

  If Qty/Parent is equal to 0 then:

  - You can issue inventory to this material if the production worker uses it, using either the Issue Material or Mass Issue apps, by manually entering the amount used.
  - It is skipped in backflush and no material is issued for it.
  - In the Costing Workbench app, the estimated costs use 0.00.
- **Attribute Set** - Displays the base short description for the selected attribute set.

Label	Field Value
Length	100
Width	50
Dimension	4x8
Thickness	1/2

  For more information about the concept of attribute sets, refer to the article.

- **Number of Pieces** - Specifies the number of pieces for inventory attribute tracked parts.

  For example, the attribute set for the 'Metal Sheet' material you want to return is '50' square inch. Assume that you need to return '300' square inches. As a result, you enter '300' in the 'Quantity' field. In this case, the 'Number of Pieces' field would display the value of '6', since you would return six '50' square inch sheets.

  Again, for more information about the concept of attribute sets, refer to the article.

- **Backflush** - Refers to the automatic issue of materials. Backflushing is dependent on labor reporting. When a labor quantity is reported against a related operation, material is issued to the job at that quantity, to the parent operation.

  Backflushing materials can occur at two different points:

  - When a quantity is reported against an operation and the prerequisites are met.
  - At job completion when unissued material needs to be backflushed.
- **Reassign Serial Numbers to Assembly** - Select to allow the serial numbers of the materials or sub-assemblies that are issued to the job to be reassigned as the serial number for the parent assembly item itself.
- **Make Direct** – The check box is automatically selected if the part exists in your part master file and this record has its Non-Stock Item check box selected. This indicates that these parts are normally not stored within inventory.
- **Misc Charge** – Miscellaneous charges are additional costs which you need to include on sales orders, quotes, and invoices. If you select the **Miscellaneous Charge** check box then the Misc Charge field activates. Next, select the reason why this material will be a miscellaneous charge from the list.
- **Added Material** – Indicates that this material was added after the initial setup of the job.
- **Link to Contract** - Indicates you can link the material to a planning contract.

3. Select **Purchasing**.

   The **Purchasing** card displays.

   The card displays information if the material is a purchased item.

   - **Lead Time** – The estimated number of days between when you order the material and when the material is ready to be used on the job. Only active when the Purchase Direct check box is selected, this value is used to calculate the Suggested Order date for purchased materials.
   - **RFQ Needed** – Indicates that a request for quote is required before this material is purchased. This check box is only available if you select the **Purchase Direct** check box.
   - **Inspection Required** – Indicates that this purchased material must be inspected once it is received into your shop. This check box is only available if you select the Purchase Direct check box. As you enter a receipt for this Job Material line, you will automatically receive it to inspection.

4. To specify the material costs for the selected material, select **Costs**.

The **Costs** card displays.

Using the card you can specify the 'Material', 'Labor', 'Burden', and 'Subcontract' costs.

5. To add material salvage related information, select **Salvage** and select the material salvage related information. This information lets you create credit back to the job and determines how much of the planned scrap quantity can be recovered.

6. If the job is a service job, add and edit the estimated materials that are needed to complete a service call. This lets you track the material costs of the service call.

7. Select **Reference Designators** to define the reference designators related to the material being used in the method of manufacture. The reference designators can be added as a series using the **Add Range** button.

8. Select **Inspections** to review or add an inspection plant for the material. An inspection plan ensures the quality of the material used during the job process.

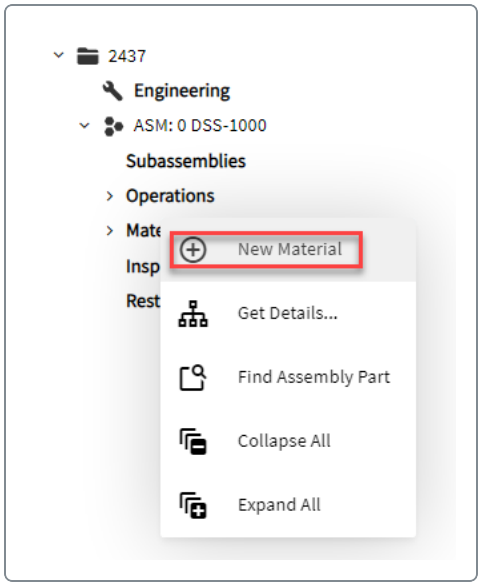
9. Select **Restrictions** to view and enter information related to RoHS restriction types.

10. Select **Fulfillment** if you want to set the selected material for fulfillment.

If you select the 'Ready To Fulfill' check box, located on the card, you can fulfill this material using the 'Fulfillment Workbench' app.

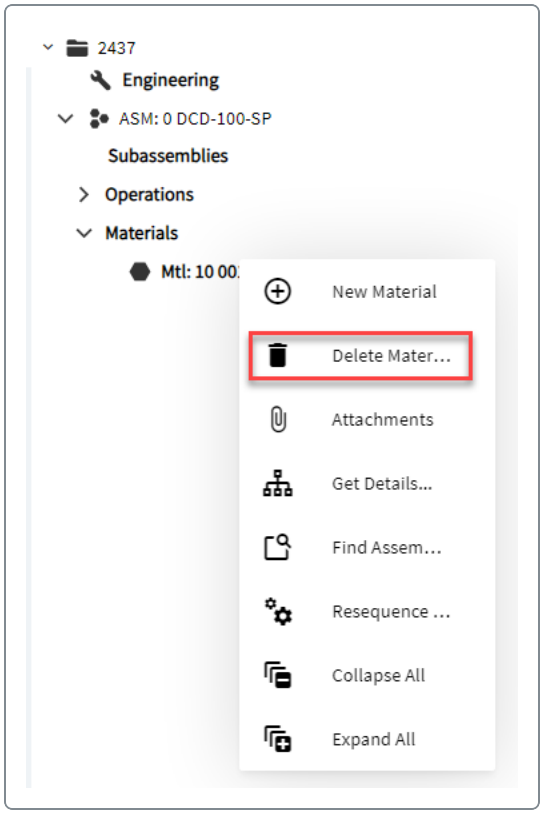
In Kinetic, you can automate allocating of materials. For more information about 'Automated Fulfillment' review the and articles.

11. Finally, you can also add a new material. This is if you are entering a new 'Method of Manufacture' or modifying an existing one. To do so, right-click the 'Materials' node in the Nav tree and select 'New Material'.

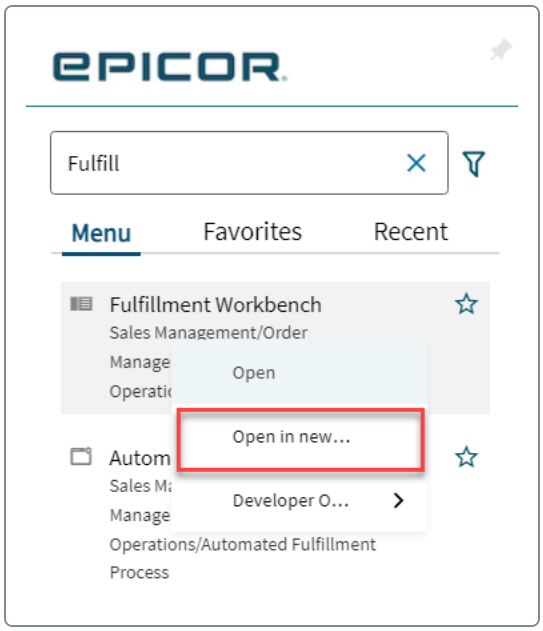


12. To delete a material from the job's method, right-click the material and select **Delete Material**.

However, you cannot delete material or job that holds a 'Material Queue Transaction'. For further information, review steps '13-26'.



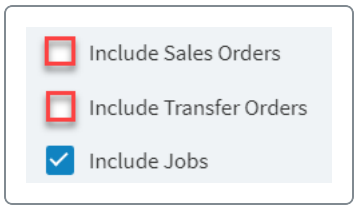
13. Keep the **Job Entry** app launched and open the **Fulfillment Workbench** app in a new tab.



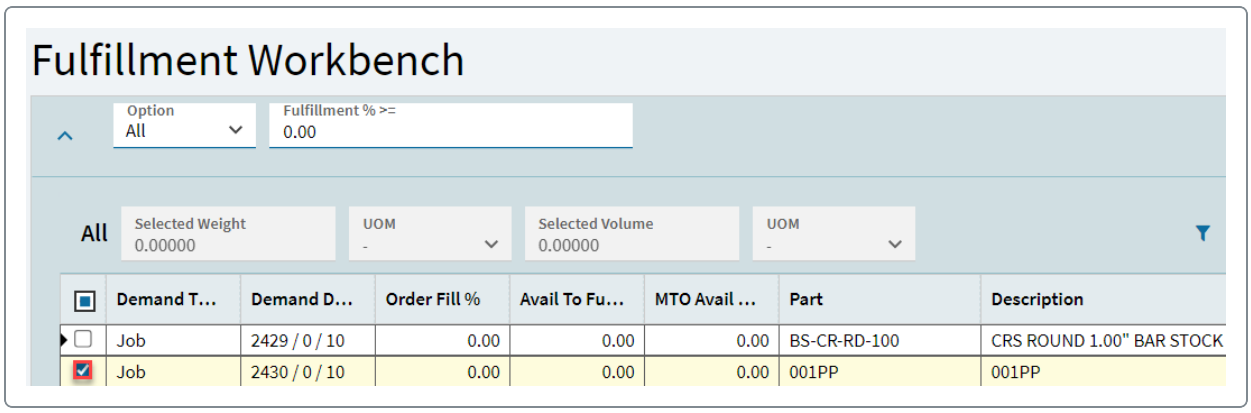
14. In the **Fulfillment Workbench** app, select **Search**.

    The **Search** panel opens.

15. Inside the panel, clear the **Include Sales Orders** and **Include Transfer Orders** check boxes.

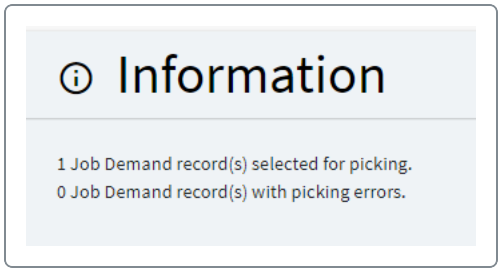


16. Inside the panel, select the **Search** button.
17. Select your job in the **Search** results grid and select **OK** to confirm.
18. In the **Fulfillment Workbench** app, select your job.



19. From the **Overflow** menu, select **Reserve and Release for Picking > All Warehouses**.

    The **Information** panel displays.

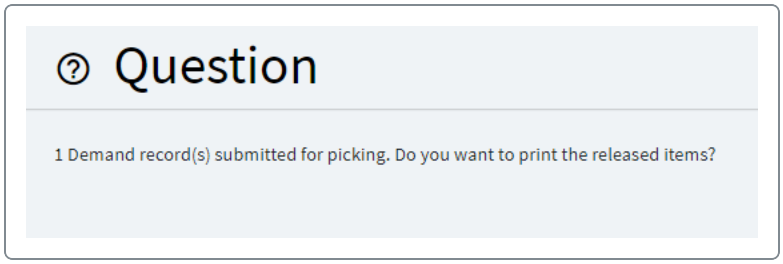


20. Inside the **Information** panel, select **OK**.

    The **Fulfillment Workbench Release For Picking Options** panel opens.

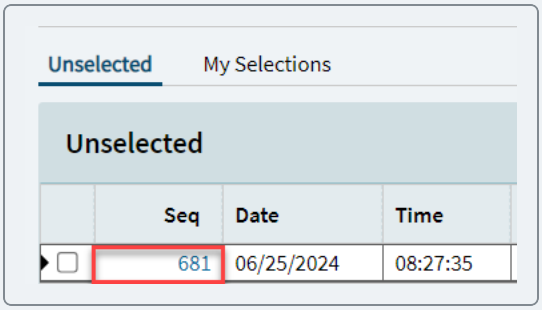
21. Inside the panel, select **OK**.

    The **Question** panel opens.

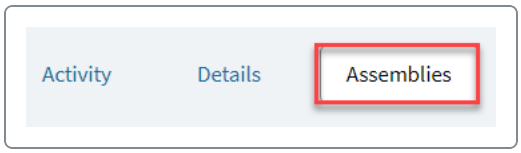


22. Inside the **Question** panel, select **No**.

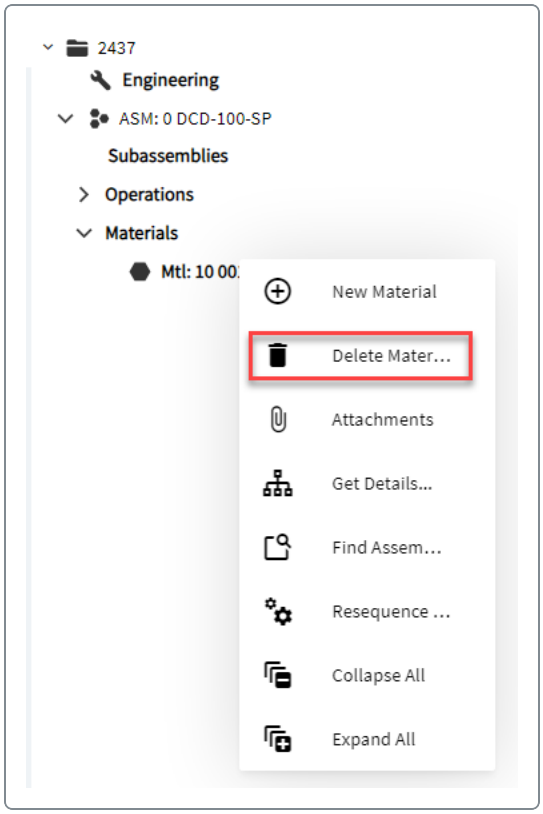
As a result of your reservation, Kinetic created a new material queue transaction. You can verify this in the 'Material Request Queue' app.



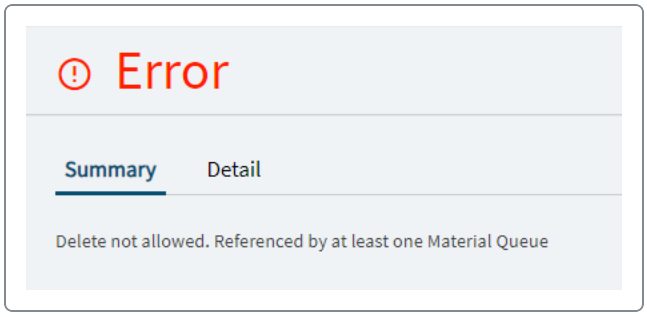
23. Next, in the **Job Entry** app, navigate to the **Assemblies** page.



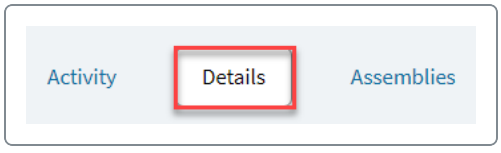
24. Expand the **Materials** node, right-click your material, and select **Delete** material.



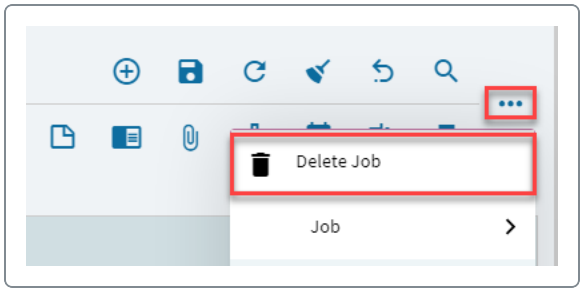
The **Error** panel opens informing you that you cannot delete this material because there is a material queue against it.



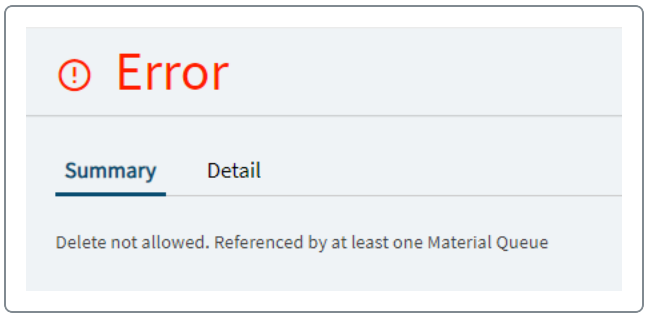
25. Next, select the **Details** page.



26. From the **Overflow** menu, select **Delete Job**.



The **Error** panel opens informing you that you cannot delete this job because there is a material queue against it.

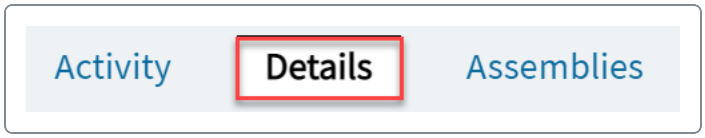


27. Remain in the Job Entry app.

Engineering, Scheduling, and Releasing a Job

Next, finalize the job.

1. Select the **Details** page.

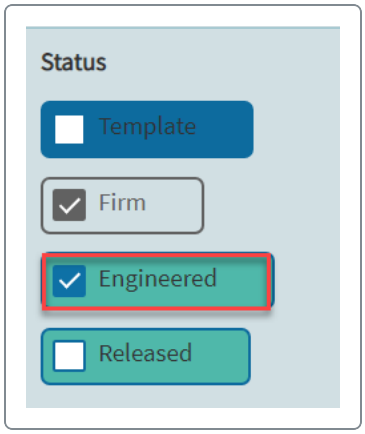


2. In the Nav tree, select the **Details** node.

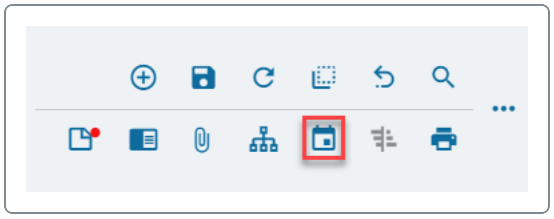
   The **Job** card displays.

   This is the very top node.

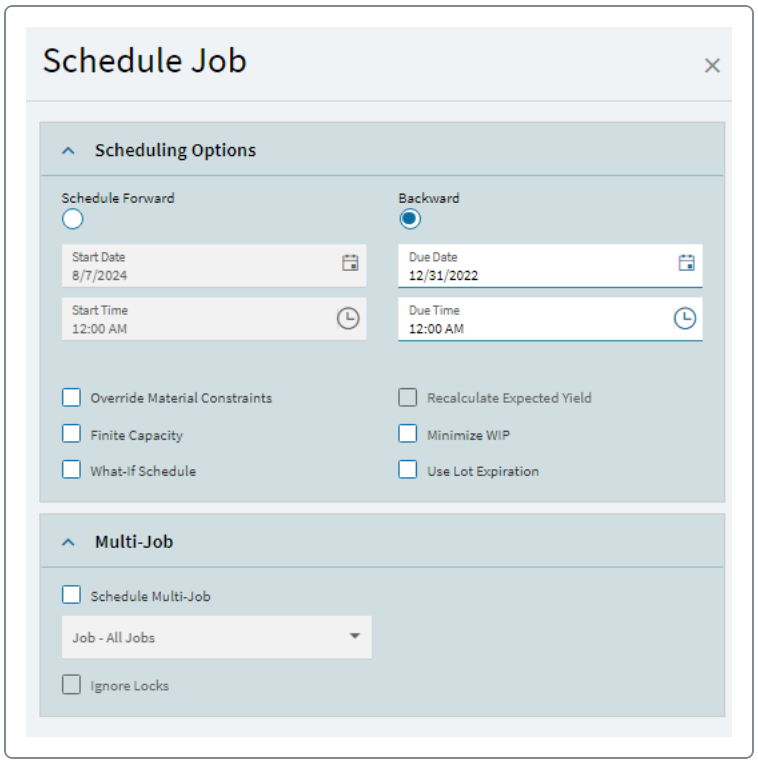
3. Select the **Engineered** check box.



4. Select **Job Scheduling**.



The **Job Scheduling** panel opens.



You can schedule the job 'Forward' or 'Backward'.

- Forward Scheduling is logic used by the scheduling engine to calculate the length of time it will take to complete a job. This logic begins with the Start Date on the job and then moves forward through the Production Calendar used at the resource, resource group, site, or company, and uses the lengths of time required on each operation (Operation Time) - taking into account any operations that can run concurrently (peer assemblies) - to arrive at the End Date.

- Backward Scheduling is a type of logic used by the scheduling engine to calculate the length of time it will take to complete a job. This logic begins with the End Date on the job and then moves backward through the Production Calendar used at the resource, resource group, site, or company, and uses the lengths of time required on each operation (Operation Time) - taking into account any operations that can run concurrently (peer assemblies) - to arrive at the Start Date.

- Select the **Override Material Constraints** check box to indicate you will ignore material constraints defined for parts used on the current job.

  When a material is constrained, the scheduling functionality determines when this material is available for an operation. It then uses this date as the operation's Start Date. However, in some cases, you may wish to ignore these material constraints.

- Parts are manufactured through operations that run on a group of related resources. Scheduling is calculated through the values defined on each specific resource, which can be either a machine or an employee. If a resource is defined as Finite, it means that it is constrained to run for a specific number of hours each day and that the operations cannot be scheduled beyond this hour limit – or Capacity. When you select the **Finite Capacity** check box, all resources defined as finite are scheduled with this constrained capacity. Any resources not defined as finite, however, are scheduled using Infinite Capacity.

  If you do not select this option, the scheduling functionality assumes that all resources on this job have infinite capacity which means there is no limit to the number of operations that can be scheduled within these resources. You have pros and cons for both infinite and finite scheduling. Finite Scheduling does not allow overloaded resources, but it can cause your jobs to miss their Required By Dates. Infinite scheduling is useful for locating bottlenecks on specific resources, but more manual work is required to resolve scheduling issues.

  Finite Horizon Hierarchy:

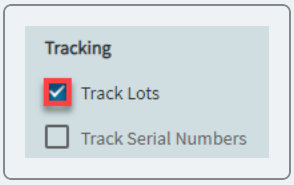
  Production Quantity = Stock Quantity + Job Quantity + Order Quantity

  The Finite Horizon hierarchy is correct, only if Site Horizon is > = than the Resource / Resource Group horizon.

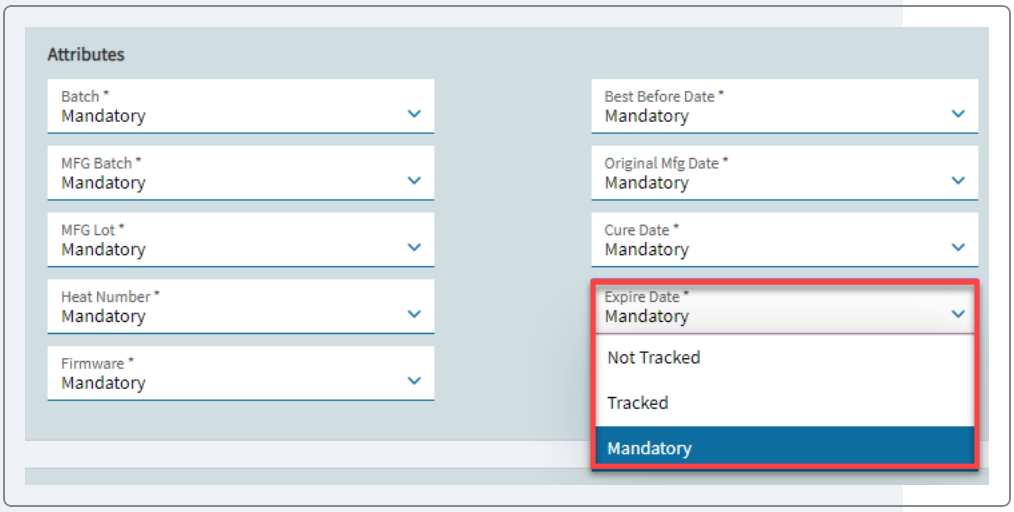
- Select the **What-If Schedule** check box to test a job's schedule by first creating a temporary schedule and then reviewing its impact on the overall schedule. On the scheduling boards, these hours are displayed as what if times, and you can view them independently from your current times. When you decide that the temporary schedule is acceptable, you remove the job schedule's What If status by accepting the changes on a scheduling board. This job time is then incorporated into the current schedule.
- Select the **Recalculate Expected Yield** check box to indicate you want the application to handle over-production or under-production for this job. You need to have already selected the Production Yield check box om Job Entry and at least one production yield recalculation system action on the Operation master for every operation used on this job.
- Select the **Minimize WIP** check box to reduce the gaps between operations on a single job or a group of associated jobs that are scheduled via the Schedule Multi-Job feature.
- **Use Lot Expiration** - Select the **Use Lot Expiration** check box for the process to consider the lot 'Expire Date' in its calculations. If the date on a lot expires, then the quantity tied to that particular lot is considered unavailable.

  The process will only consider the 'Expire Date', if:

  a. You set a part to 'Track Lots' in the 'Part' app.

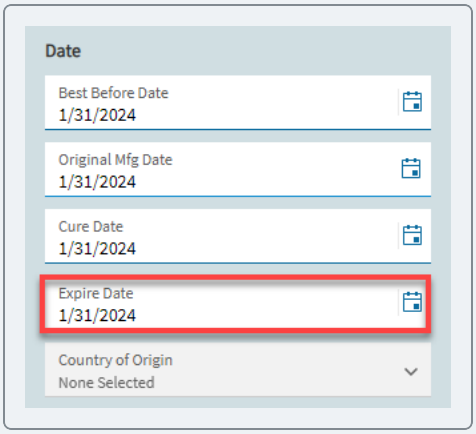
  b. You set the 'Expire Date' to 'Tracked' or 'Mandatory' in the 'Part' app using the 'Lots' node in the Nav tree.



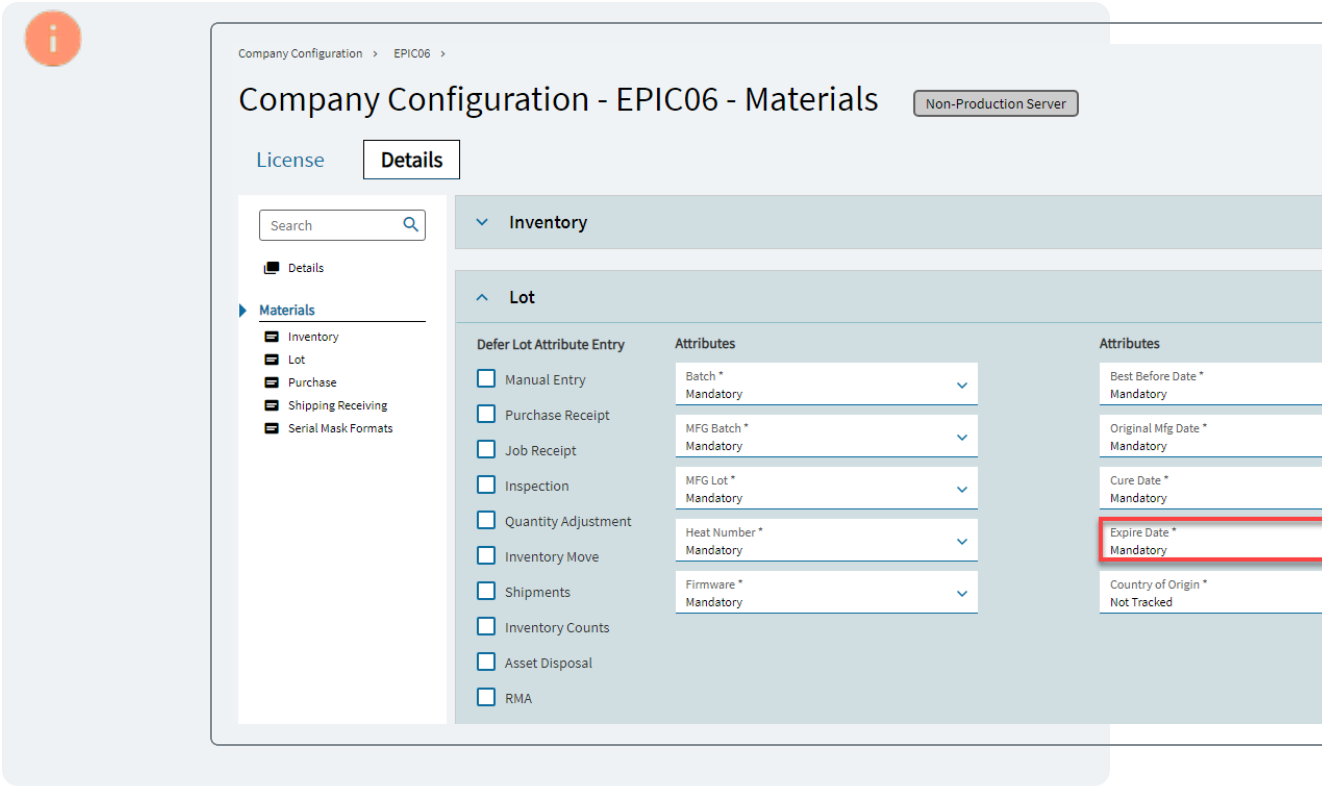
The following rules apply:

- If the 'Expire Date' is 'Not Tracked', then the process will not consider the 'Expire Date' for the parts set to 'Track Lots' in the 'Part' app.
- If the 'Expire Date' is 'Tracked' but not 'Mandatory', then only lots with a specified 'Expire Date' will be considered by the process.

c. You define the 'Expire Date' for your lot using the 'Lot Number Entry' app.



d. You can also define the 'Expire Date' actions at the company level using he 'Company Configuration' app.



5. Select **OK**.

   Notice the 'Start' and 'Final Operation' date fields populate. Kinetic calculated the job schedule.

   - **Start** - When the job starts in production.
   - **Final Operation** - Completion date of the operation marked as Final in the Method of Manufacture (MOM) for the assembly part. If the operation in the MOM is not marked as Final, the Scheduling engine uses the last operation in the MOM to calculate the completion date.

6. Select the **Released** check box.

7. Select **Save**.

   Here is some additional field information:

   - **Mode** - Select either Concurrent or Sequential in the Mode field. The selected value determines quantity reporting and costing.
   - **Locked** - Indicates that this job's schedule will not be changed by the Global Scheduling or Load Leveling features. Only actual schedule dates are locked. When you lock a job's schedule, any what-if schedule created for this job is automatically removed.

- **Priority** – Importance that this job will have within your schedule. If you globally finite schedule your jobs, this code determines which jobs need precedence over other jobs.
- **Receive Time (Dates)** - Amount of days required to move a part to stock or to the next job. The Receive Time is subtracted from the Requested By date.

  Production Quantity = Stock Quantity + Job Quantity + Order Quantity

- **Expense Code** - Expense code controls the GL expense account numbers used for Payroll transactions created from labor entries for this job.
- **Template** – Indicates that this job or assembly should be listed as an option for the Get Details program. Only jobs or assemblies for which the Template check boxes is selected display within this program. This check box helps you shorten how many jobs are available to copy for a specific part.
- **Synchronize Req by Date with Demand Links** - Determines the action that is taken when the job is scheduled, specifically concerning the update of the job's Required By date.
- **Completed** - Displays the quantity completed on a job. For example, a job is for '10' units of part 'A', but you have completed only '5' units so far. As a result, this field would display the value of '5'.

Reviewing the Job Scheduling Board

When you schedule a job, you can visually review the job schedule using the 'Job Scheduling' app.

1. Select **Job Scheduling Board**.

   The **Job Scheduling Board** app displays.

2. Review the job schedule.

   To learn about how to review a job schedule, review the article.

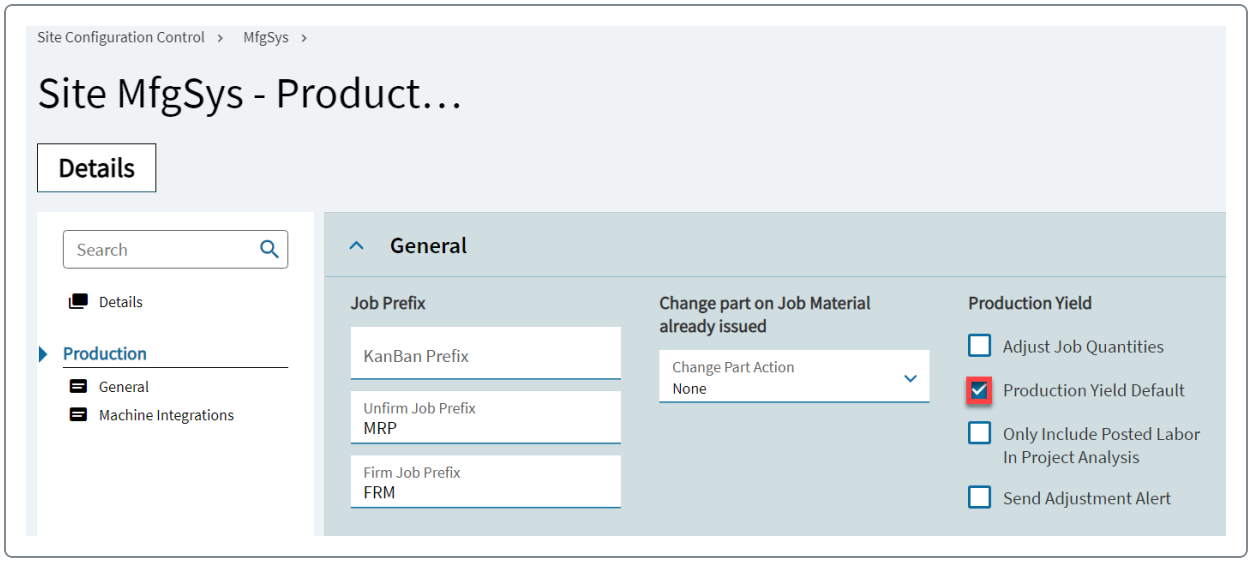
Recalculating Production Yield

You can recalculate the expected production yield for jobs marked as **Production Yield**, on the basis of job operations holding the completed status, meaning you enter labor against them using the

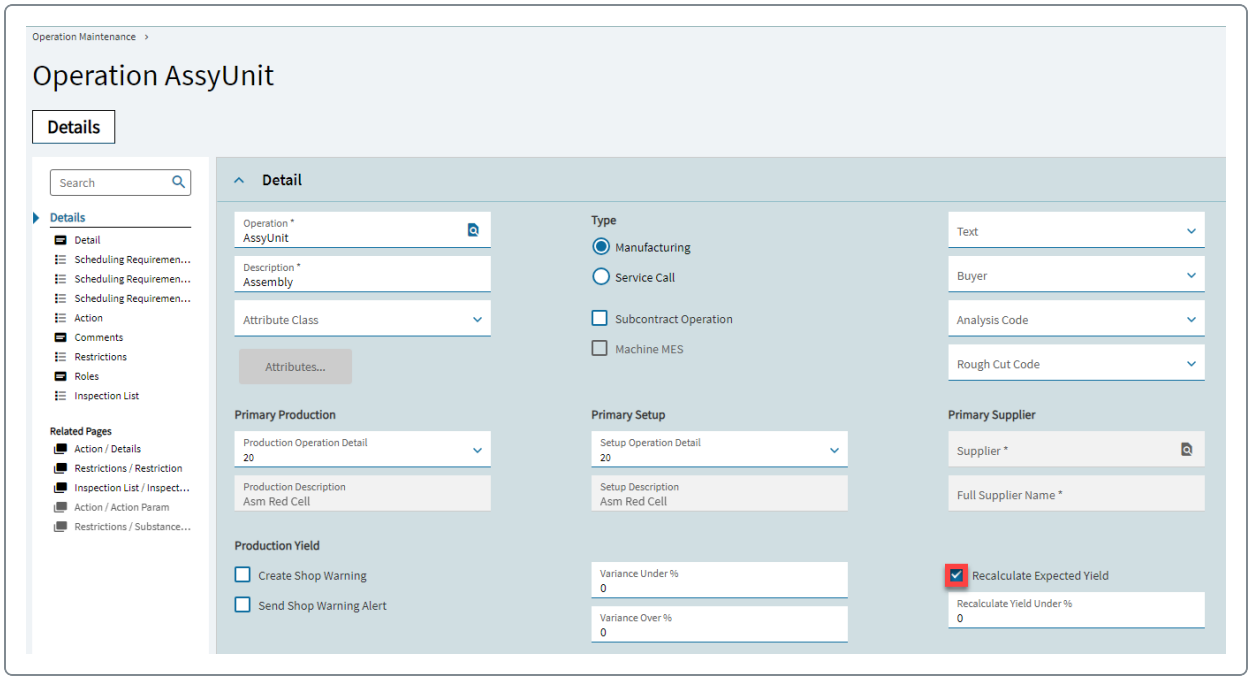
'Time Entry' or 'Dealer Portal' apps. Materials used on the jobs must come from sites that are also marked for production yield recalculation in the 'Site Configuration Control' app.

For example, assume you have a job with the production quantity of '12' units. You scrap '4' at one of the job operations. When you recalculate production yield, the job reduces the quantity to '8' units. However, to implement 'Production Yield Recalculation', you must:

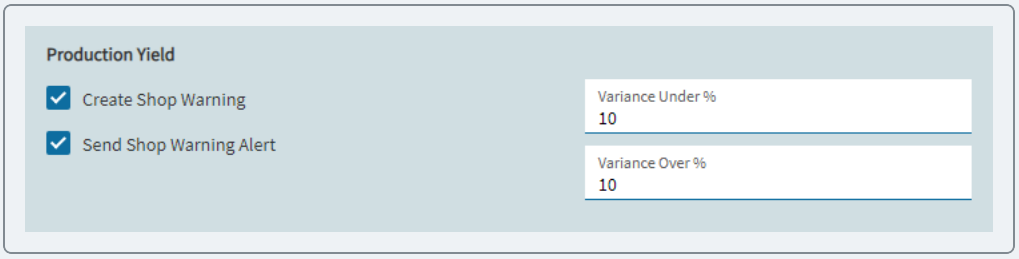
- Set up your you site.



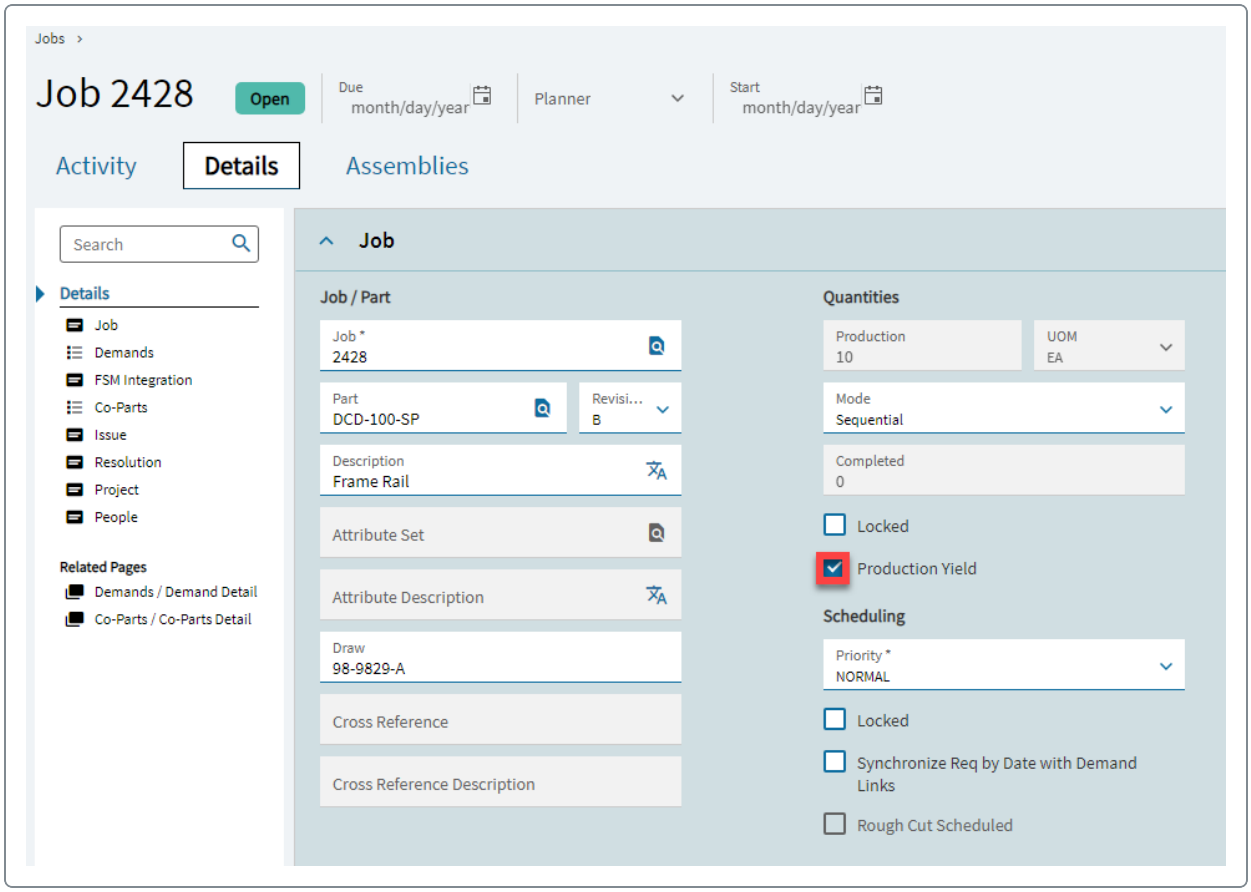
- Set up your operation.



Kinetic will adjust the job production quantity only if the operation results in under-production. You enter this threshold in the 'Recalculate Yield Under %' field located on this card. If you want to monitor over-production, use the 'Create Shop Warning' and/or 'Send Shop Warning Alert' check boxes and set a threshold in the 'Variance Under %' and 'Variance Over %' fields located on this card.

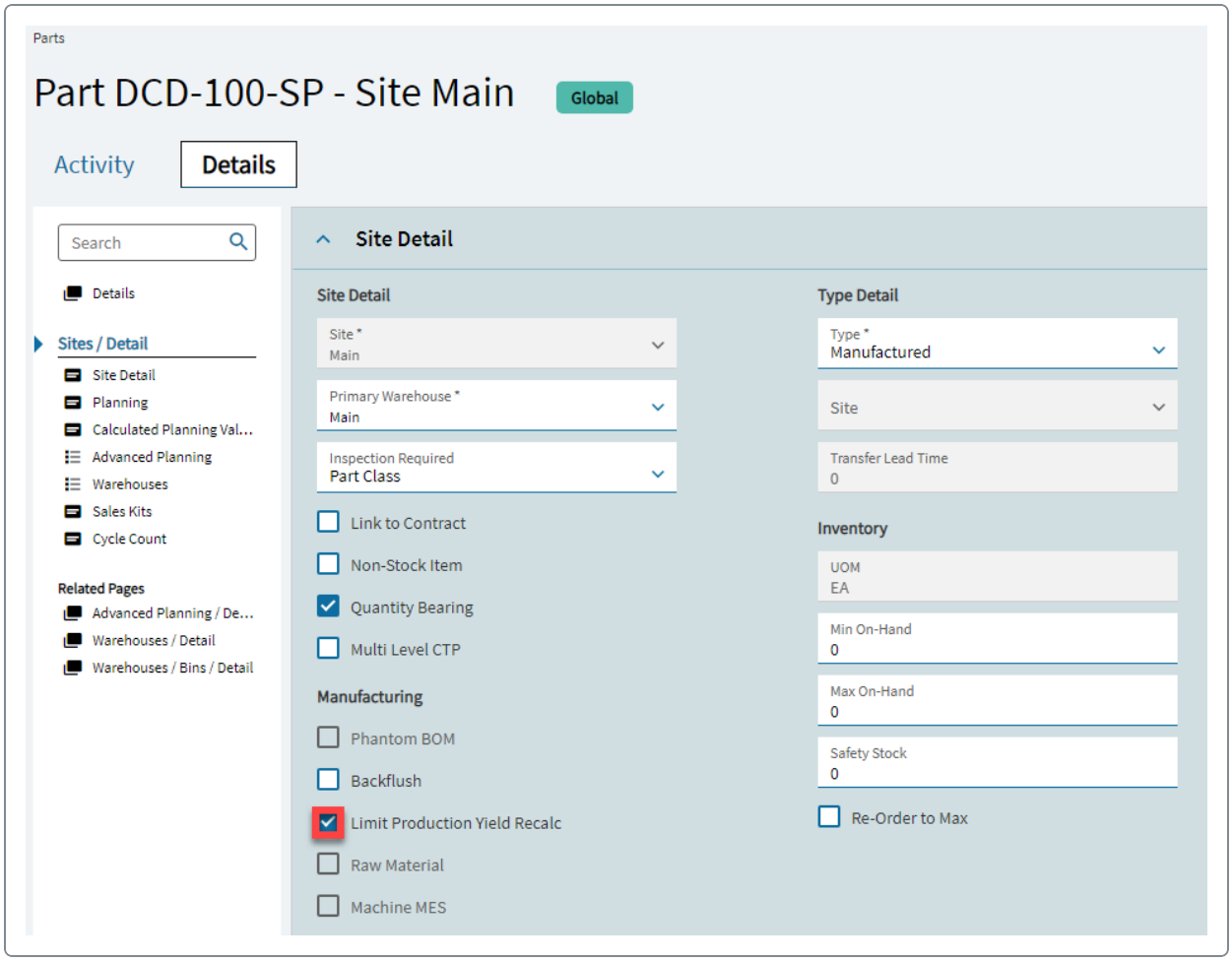


- Set up your job.



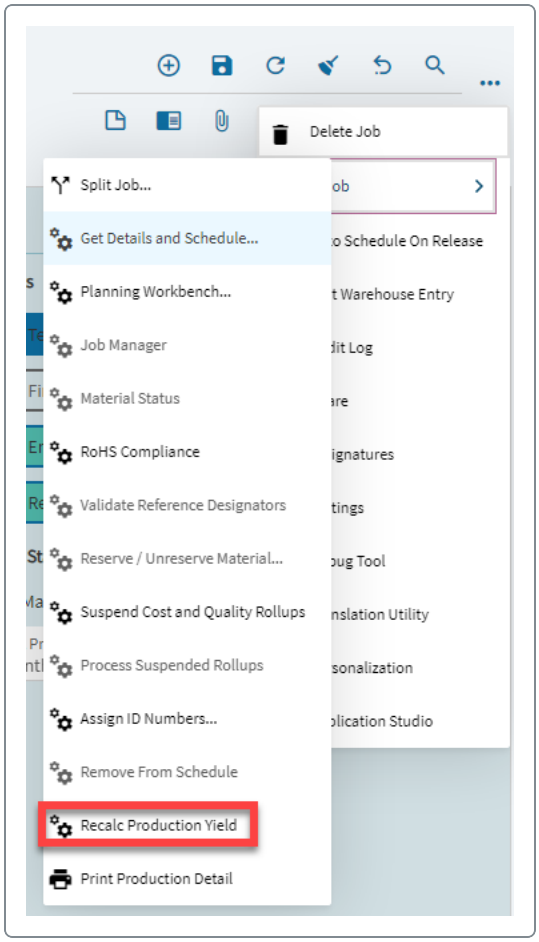
- Depending on the operation production yield settings, you may not see a re-calculation happen (percentage of change too small)

- Fixing production quantity on a job, be careful how you answer Kinetic prompt about updating original production quantity.
- There is the 'Limit Production Yield Recalc' check box in the 'Part' app. If you use sub-assemblies you may want to review this setting.



- If you don't respect the job demand link (you ship partial quantities from stock jobs) then the Time Phase is going to be out of sync.
- Part Advisor (and similar views) – Remember that the estimated material and run quantities get updated, so historical estimated costs may be skewed. Production quantity is the demand link not the original production quantity, so the yield could appear to be 100% all the time.

1. In the **Overflow** menu, select **Recalc Production Yield**.



Deleting Jobs

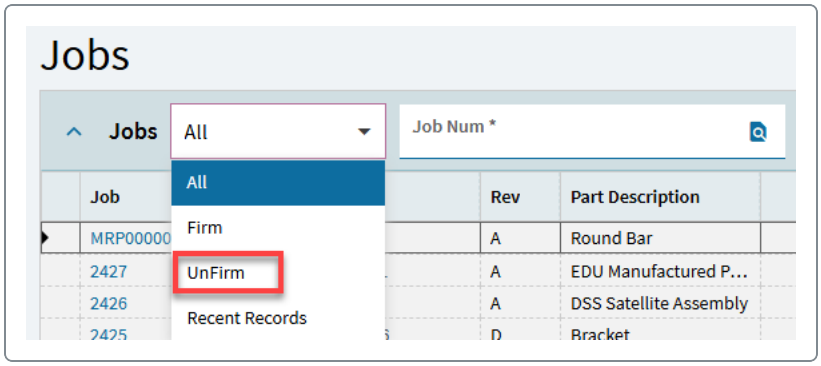
You cannot delete a job that is transacted in Kinetic. For example, there could be a material queue against it or a job holds materials that has been already issued.

However, you may also run MRP and the process generates an unfirm job(s) you need to delete. This could be for stock and non-stock (Make Direct) items.

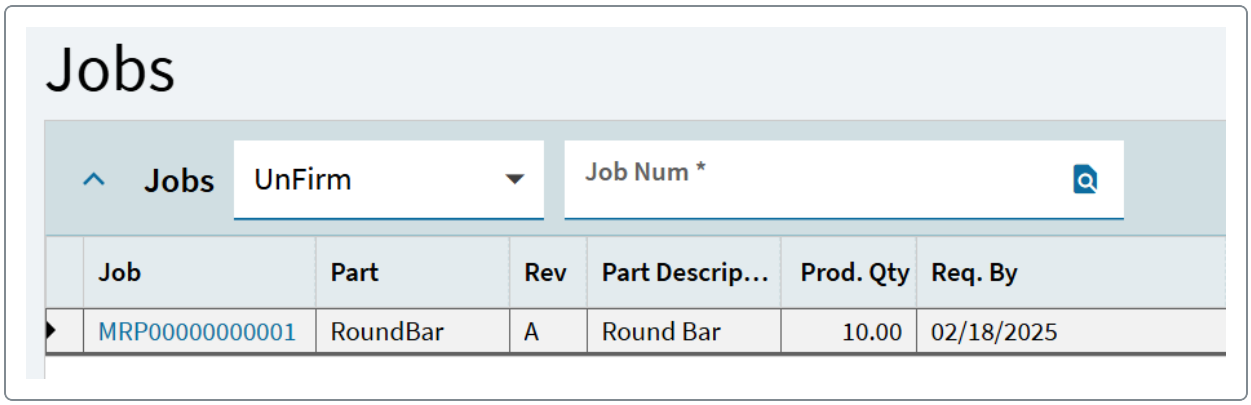
In this section, we will show you how to delete an existing job. In this case, we will delete an unfirmed job.

1. Open the **Job Entry** app.
2. Next, select the **UnFirm** option.

   The **Job** card lists all the unfirmed jobs.

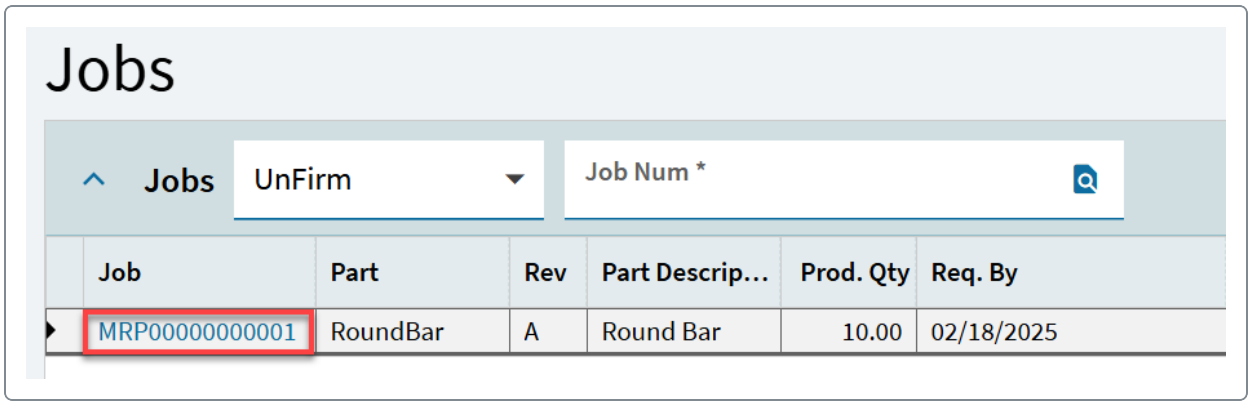


In this case, the app displayed a single job generated by MRP. The 'RoundBar' part is a non-stock item.



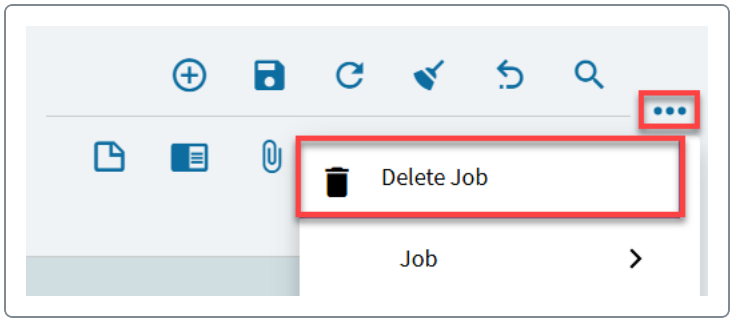
3. Click on the job link.

   The **Job** card displays.

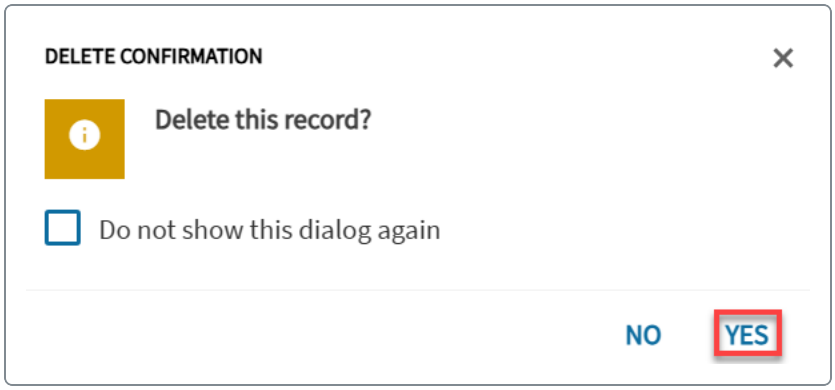


4. From the **Overflow** menu, select **Delete Job**.

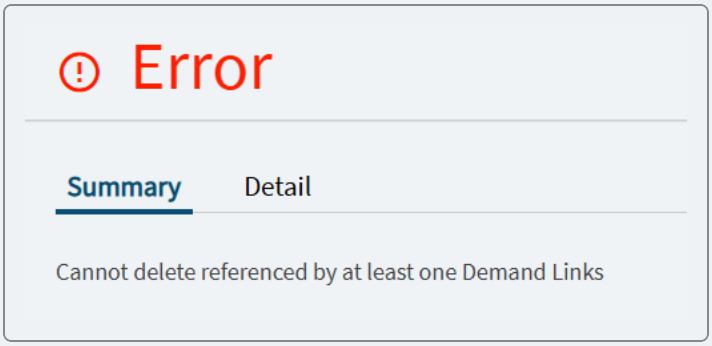
   The **DELETE CONFIRMATION** window opens.



5. In the **DELETE CONFIRMATION** window, select **YES**.



The job we have deleted was generated by MRP. However, as previously mentioned, you cannot delete jobs that have been transacted in Kinetic. For instance, if we try to delete a job that is referenced by a demand link, the following 'Error' message displays. Kinetic will always inform you why the job deletion is not possible.



Making Adjustments to the Jobs

Use the **Job Cost Adjustments** app to make specific changes to a job's labor, material, or subcontract records. You can enter positive and negative adjustments.

For example, you enter a job, issue materials, and finally start/end production. Later on you realize that you need to increase the cost for the job that you already completed.

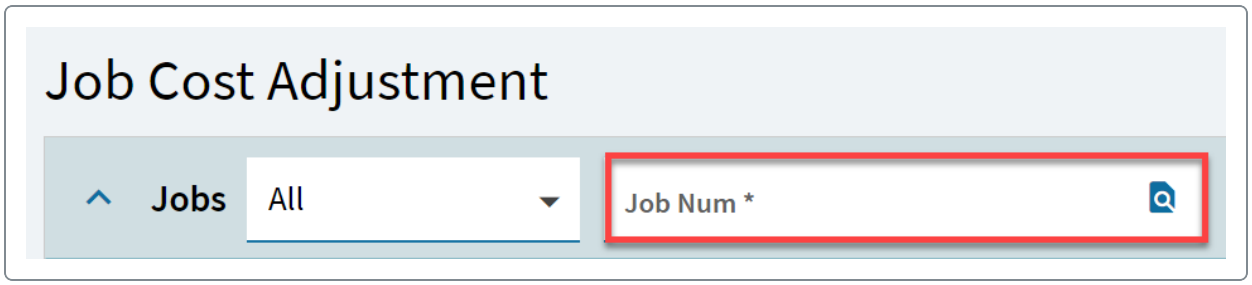
In this article, we will cover making adjustment to a job.

1. Open the **Job Cost Adjustment** app.

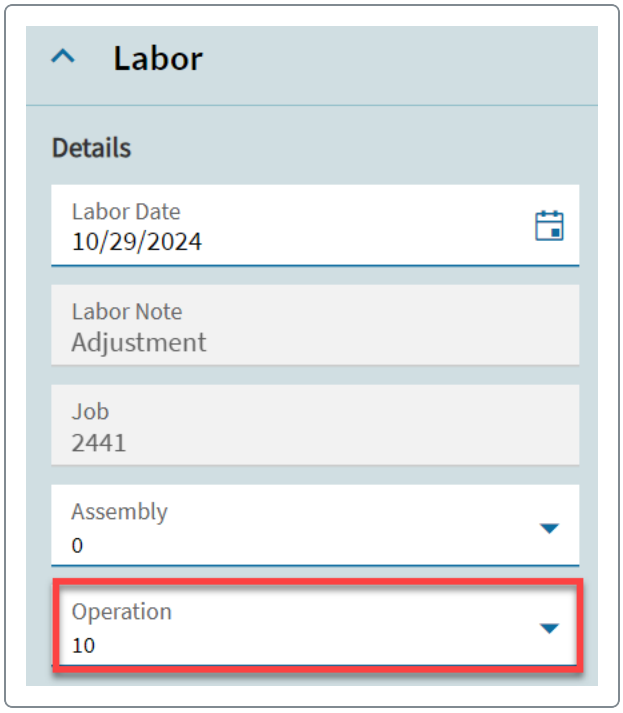
   The **Landing** page displays.

2. In the **Job Num** field, enter your job and press **Tab**.

   The **Job Details** card displays.



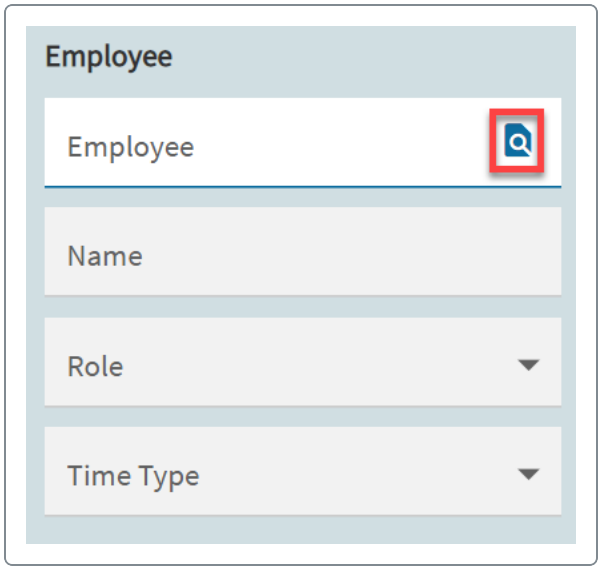
3. Next, select an operation.



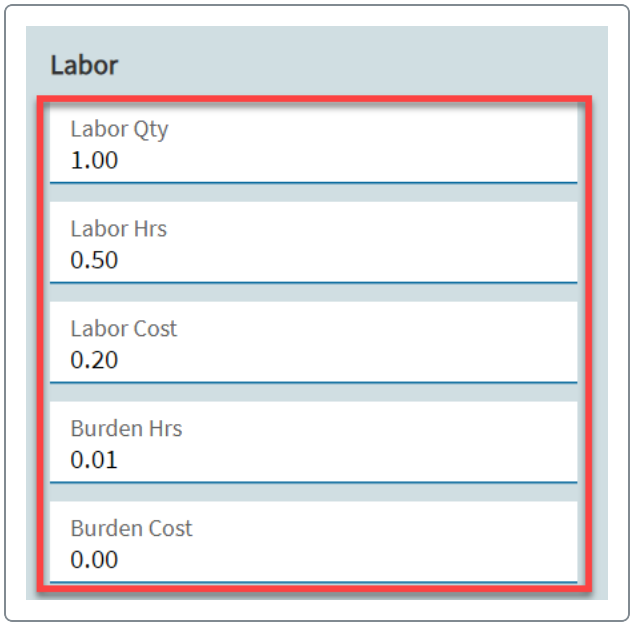
In this case, we selected operation '10'.

4. Review the values in the **Job Cost** group box.

5. Search for and select an employee.

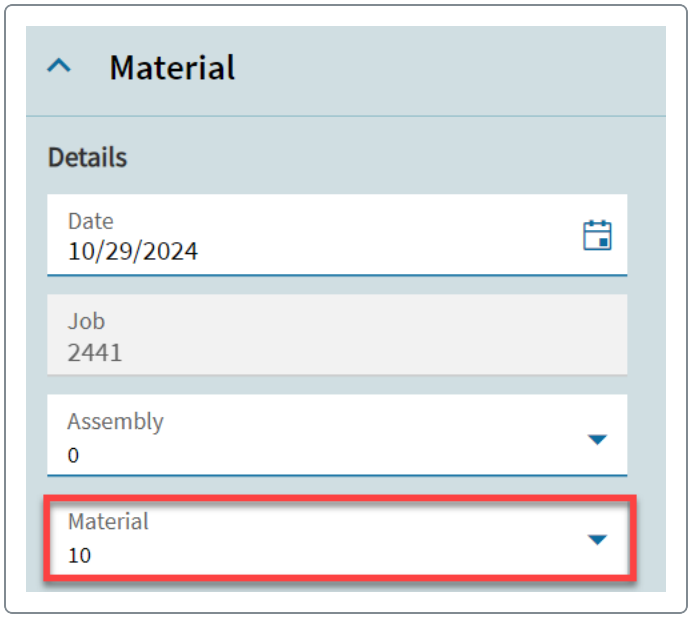


6. Enter the **Labor** related values based on your requirements.



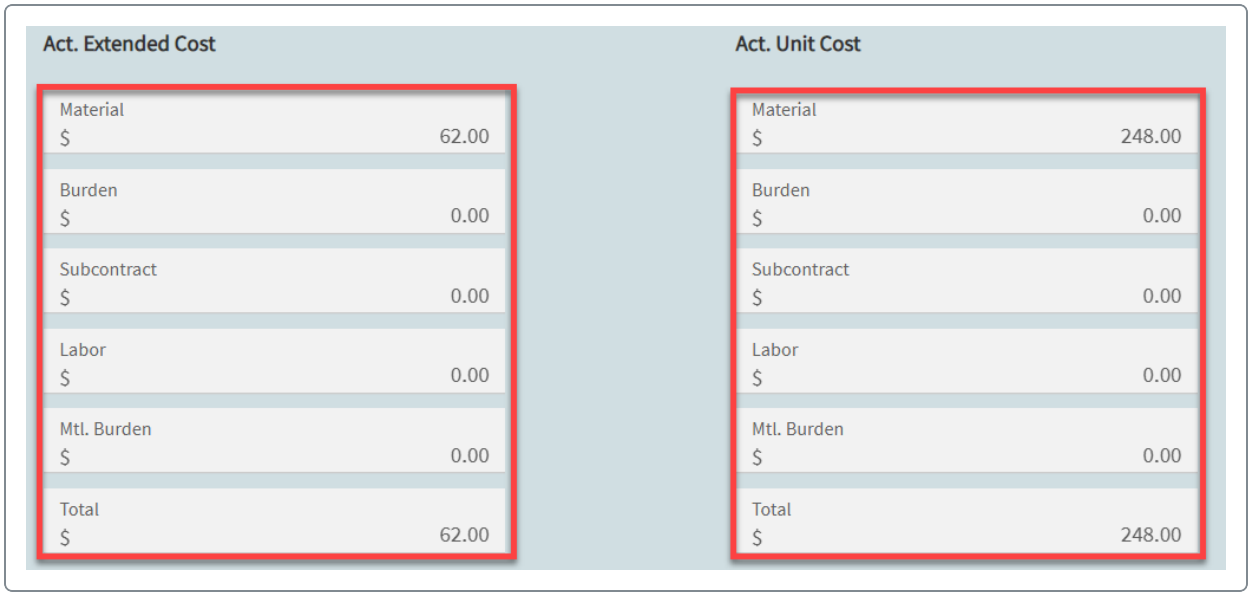
The Labor adjustments in the screenshot are just examples.

7. Select **Save**. 
8. Next, scroll down to locate the **Material** card and expand it.
9. Select your material.

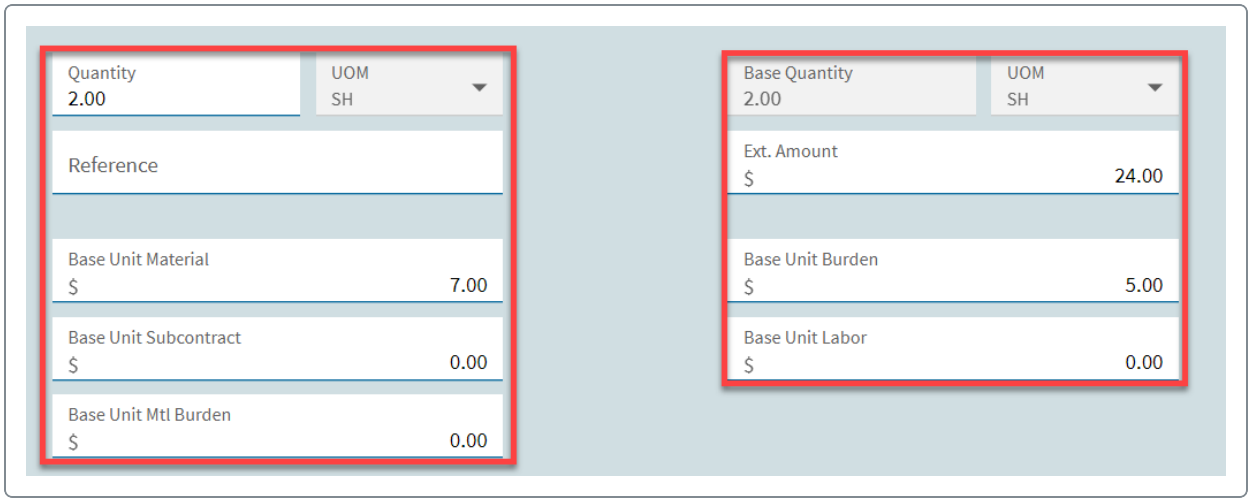


10. Review the current costs.

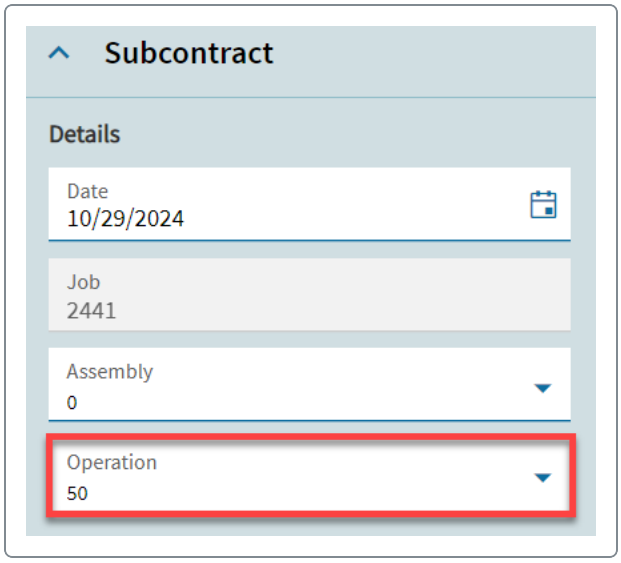
This is the material issued to the job.



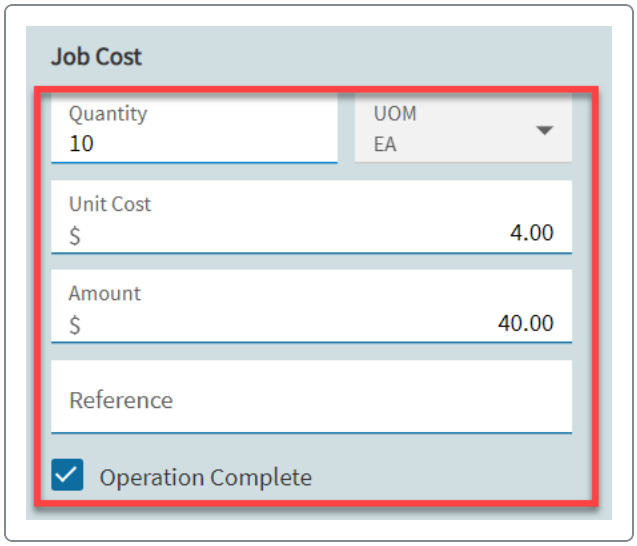
11. Enter the material adjustment values.



12. Select **Save**. 
13. Scroll down to locate the **Subcontract** card and expand it.
14. Select your subcontract operation.



15. Enter your adjustment values.



16. Select **Save**. 
17. Exit the Job Cost Adjustment app.

Entering Co-Parts in Job Entry

You can enter 'Co-Parts' (multiple parts) manufactured through the current job. For example, a manufacturer makes upholstered office chairs. They manufacture several different sized chair backs which use the same fabric. In this scenario, you can enter a single job that creates two different parts on one job operation (stamping the material into two different sizes).

The following rules apply:

1. You can only enter co-parts if you install the **Advanced Production** license.
2. You cannot delete a co-part from a job that has labor reported against it.
3. You cannot add co-parts for jobs that are set to 'Engineered'.
4. You cannot add 'on-the-fly' co-parts for 'Make to Stock' demand link.

To add a co-part:

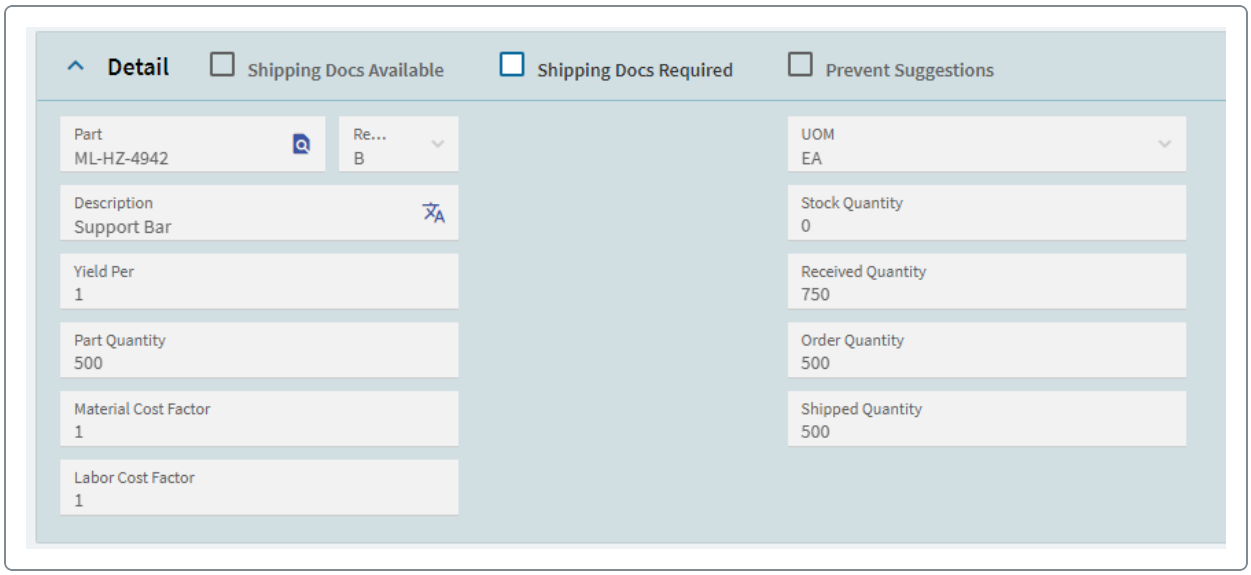
1. Open the **Job Entry** app and search for and select a job.
2. Select the **Details** page and in the Nav tree select the **Co-Parts > Co-Parts Detail** node.

   The **Detail** card displays.
3. Select **New** .
4. Search for and select the part you want to add.
5. Specify the other fields as required.

   Here is more information about the important fields:

   - **Yield Per** – The part quantity manufactured during each operation. If the job will be produced in sequential mode, this field displays the value of one (1). If this is a concurrent job, however, you can enter a different value in this field.
   - **Material Cost Factor** – A value that defines the ratio used to prorate material costs on each part. This value affects the final material costs that will accumulate for each part quantity manufactured on this job.
   - **Labor Cost Factor** – A value that defines the ratio used to prorate labor costs on each part. This value affects the final labor costs that will accumulate for each part quantity manufactured on this job.
   - **Stock Quantity** – The part quantity that is available within inventory. If the part does not exist in your part master file, you must enter a stock quantity. The stock quantity is used to calculate the total Production Quantity.

- **Prevent Suggestions** - Indicates that MRP will not create job suggestions for the specified co-part. This check box is not enabled for the parent part.



6. Select **Save**.

Managing the Job Tree View

The Job Tree View visually displays the job's method of manufacturing through a tree structure. Navigate to the **Assemblies** page and add the entries for the operations, suboperations, materials. Each method item is displayed with an icon and some descriptive text. Use the interface to quickly view the job's method, tracking the job's progress as its quantities are manufactured. Use the **Assemblies** page to select and drag method of manufacturing items onto the Job Tree View. You can also define what items are displayed on the Job Tree View.

Each Job Tree View icon identifies the manufacturing item and in some cases, indicates the item's current status. Read the Icon Details section for a key of each icon and what it means.

Icon	Description
	This is an assembly linked to the job.
	This is a job for inspection. Inspection plans can be linked to assemblies, operations or materials.
	This item is a standard job.
	This item is a material. This is a default icon for material.
	Indicates material attention.
	Engineering item. It allows to drag and drop material, assemblies and operations onto a job from parts, quotes and BOMs.
	The material is complete.
	Indicates that the backflush location does not have enough on-hand quantity to satisfy the requirement, but the job material record's warehouse - plus the backflush warehouse - does have enough on-hand quantity.
	Indicates a material with a zero quantity per parent for which nothing has been issued. The icon will display even after the job is completed and closed, so long as the material is not issued.
	An operation that has not been run yet. This icon may also be coupled with the "tag with a red dot" icon to indicate that there are material constraints for the operation.

Icon	Description
	Operation has been complete.
	Indicates operation detail.
	Indicates that this subcontract operation is complete.
	Indicates that the subcontract operation has a capacity constraint.

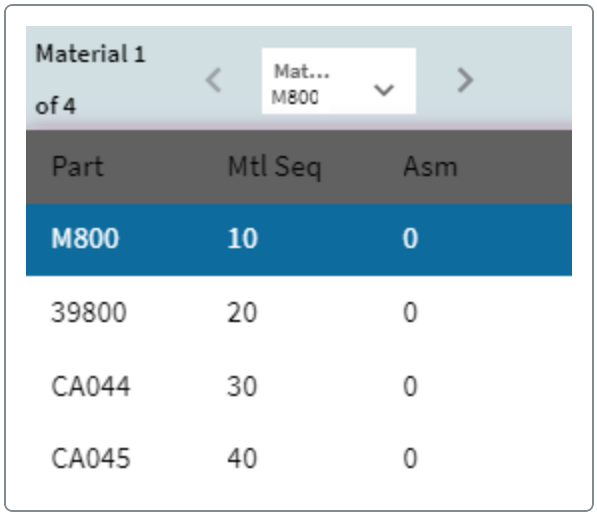
Reviewing Material Requirements for a Job

In **Job Entry**, review material requirements for a current open job using the **Material Status** option of the Overflow menu. The panel that opens displays all the material requirements – including any stock assemblies that have pull quantities. You can also filter the material requirement so that they only display assemblies within the current job's method of manufacturing where the current material quantities do not satisfy demand.

1. In **Job Entry**, select an open job you want to review the material requirements for and select **Material Status** from the Overflow menu. •••

2. Select the part you want to see the details for from the **Material** drop-down on the header of the **Material Inventory Quantities** card. This drop-down helps you easily navigate through all the parts in the job.

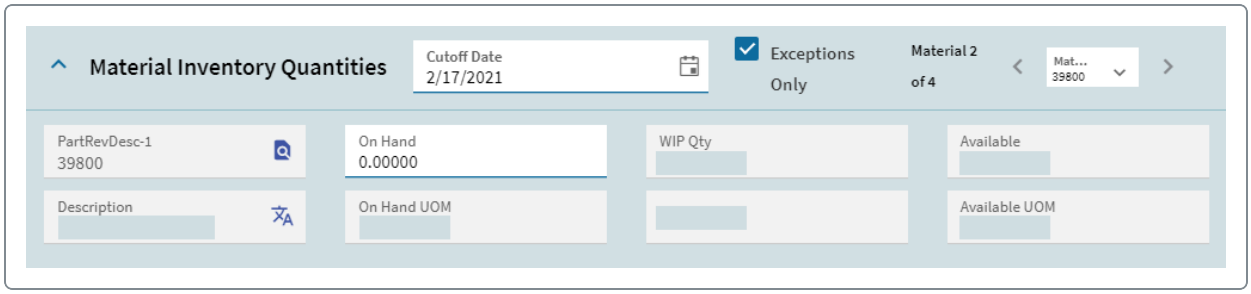
   The **Part** and **Description** fields display the details for the material you select.



3. Review/change the cutoff date. This is the last date on which these material requirements will appear so the system displays material requirements due on or before this date. The current date is the default value.

4. Select the **Exceptions Only** check box if you want the panel to only display requirements with the **Quantity On Hand** values that are either less than the required quantity or require an outstanding quantity. This way it won't display any material requirements that are complete or have sufficient stock materials.

5. Review/change the quantity of this part currently available within inventory in the **On Hand** field. This quantity is the total for all the sites. The on hand quantity is equal to the sum of all warehouse bin quantities listed for this part. If the part does not exist in the part master file, **On Hand** is **0**.



For example, 100 pieces of part 1000ABC are available in Bin 1 from warehouse 1. 250 pieces of part 1000ABC are available in bin 2 from warehouse 2. **350** appears as the **On Hand** quantity for part 1000ABC.

6. Review other details of the material, if necessary.

   Tip: Other factors enter into the inventory quantity that you should consider. For example, you may need to consider planned receipt quantities from your suppliers or quantities currently in production. Use the **Time Phase** inquiry in **Part Tracker** or the **Time Phase** report to get an accurate picture of the stock available for any part.

   - **WIP Qty** - Part total of the work in process (WIP) quantity.
   - **Available** - The quantity of this part currently available in stock. This quantity is the total for all the sites minus any quantities that are currently allocated to jobs. This way, Quantity Available = Total Quantity On Hand - Total Allocated.

     For example, 100 sheets of sheet metal part SM123 are currently stocked in inventory. An order has been taken that calls for 45 sheets of part SM123. 55 is the quantity available.

7. Review additional materials details on the **Materials** card and, if necessary, run the **Material Requirements** report.
8. Select **Save** and then **OK** to close the panel and go back to **Job Entry**.

Assigning Serial Numbers to a Job

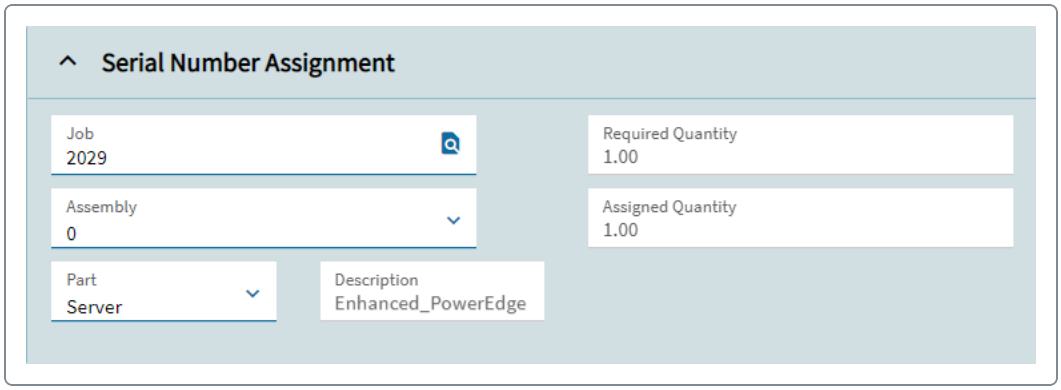
Assign serial numbers to serial tracked parts on a job in **Serial Number Assignment**.

Serial numbers can assist you in finding potential defects - both defects on items you purchase and defects on items you ship to customers. The earlier you assign serial numbers, the better audit trail you will have.

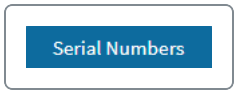
Assuming the material is designated as serial number tracked, you must enter serial numbers when issuing the material from inventory or inspection to a job. You can also unassign serial numbers assigned to jobs by mistake.

Assigning Serial Numbers

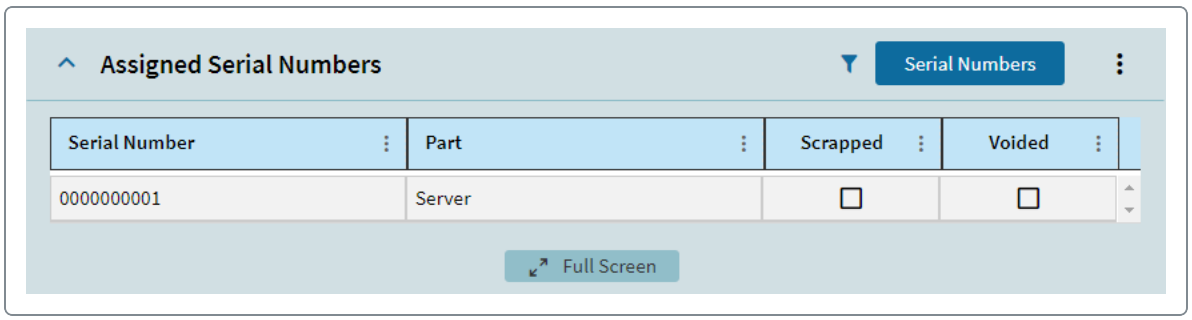
1. Open the **Serial Number Assignment** app.
2. On the **Landing** page, select a job with a part for which you want to assign serial numbers.
3. Select the assembly to which you wish to issue material. This must be a valid assembly sequence for the specified job. If you don't want to issue material to a specific assembly, leave this field set to **0** (zero), which is the top-level assembly for the job. The other fields update automatically.
    - Assigned Quantity - Serial number quantity for this transaction.
    - Description - Part description.
    - Part - Part issued to the job. The default is the part number associated with the specified job material sequence.
    - Required Quantity - Required quantity from the job assembly record.



4. On the **Assigned Serial Numbers** card, select the **Serial Numbers** option to access the **Select Serial Numbers** card where you can create serial numbers to assign to the parts.



5. The **Assigned Serial Numbers** pane updates with created serial numbers. The **Assigned Quantity** field fills in with the number of serial numbers you created and assigned.



6. Select **Save**.
7. If you later need to scrap or void any of the previously assigned serial numbers, use the **Serial Number Maintenance** application. The relevant check boxes will show their status in the pane.

Unassigning/Deleting Serial Numbers

If you assign a serial number to a wrong job, you can correct it if you haven't posted a labor record for that serial number.

In the **Select Serial Numbers** card, select the serial number to unassign and use the **Left Arrow** option to move it to the **Available Serial Numbers** pane.

The application removes this serial number from the job. If you want to reuse it, enter it manually in the **Create Serial Numbers** card.

The status of the serial number changes to **Unassigned**. You can reassign it to another job in **Serial Number Assignment**.

In the **Serial Number** field, manually enter the serial number and press **Select**. This action moves the serial number to the **Selected Serial Numbers** list.

Splitting Jobs using Job Entry

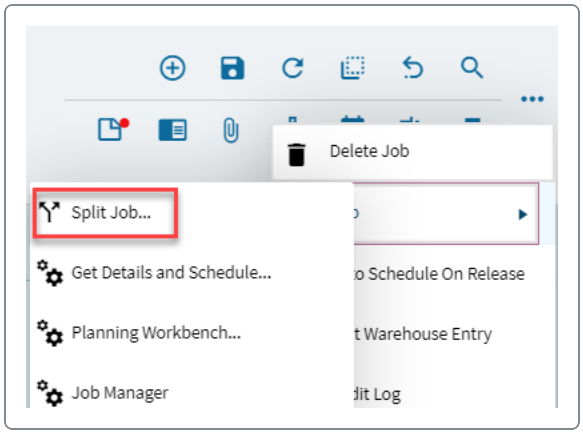
You can split a job to divide it into multiple jobs. The part quantities on these split jobs are then manufactured separately. The **Split Jobs** feature allows you to move pieces and costs from a job in process to a new job. It divides one job into two jobs relative to the split quantity. Once a job split occurs and the data is saved, undo process is no longer available, which makes this routine a real time transaction. The split quantity can be manufactured for stock, sales order, or as a job material. It also retrieves associated reference designators from the specified source job.

The **Split Jobs** feature can only divide jobs that produce a single part. If a job produces two or more parts, you cannot split the job.

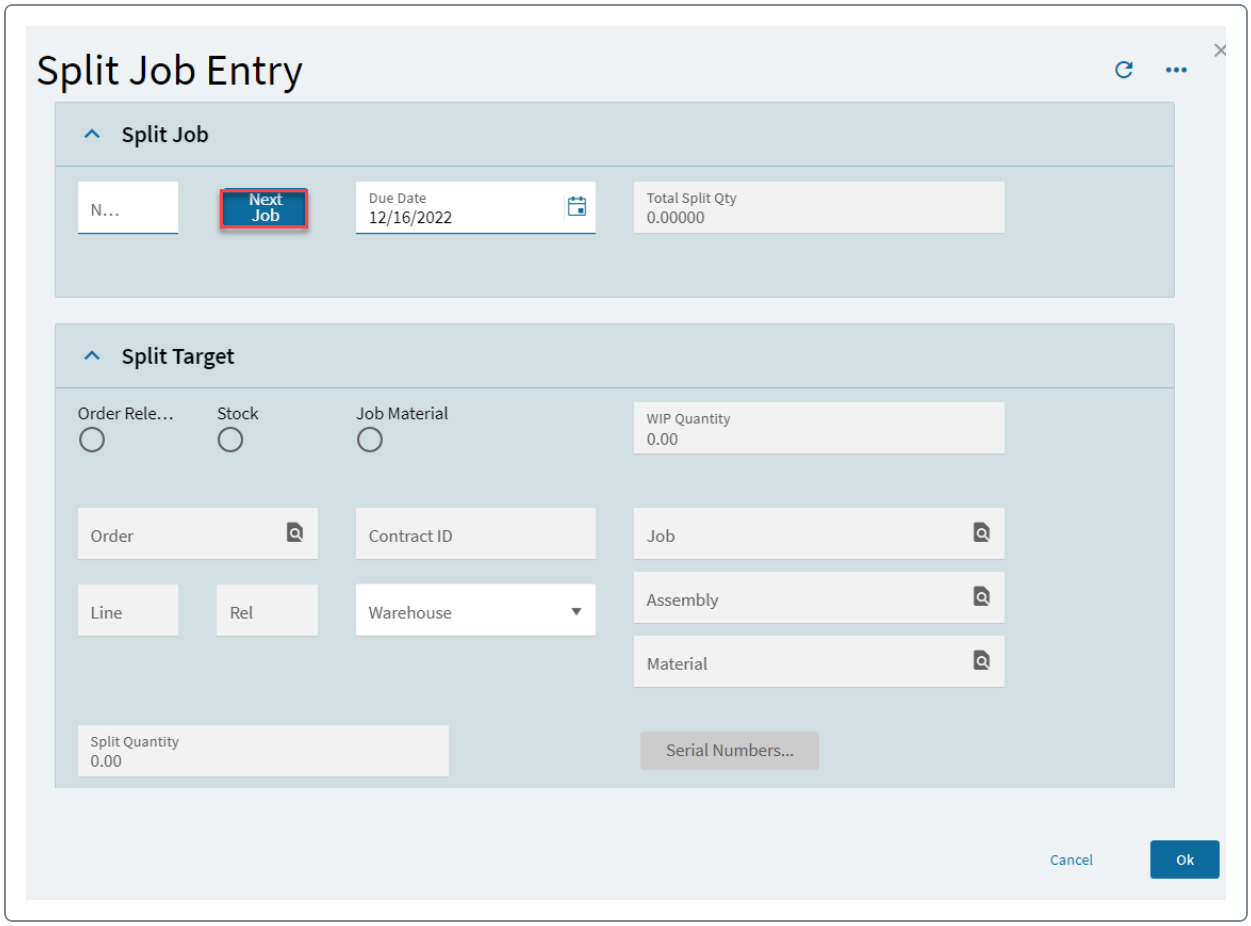
To split a job:

1. Open the **Job Entry** app and search for and select a job.

2. From the Overflow menu, select **Job > Split Job** to open the **Split Job Entry** panel.



3. Either enter the number for the new job in the New Job field or select the **Next Job** button.

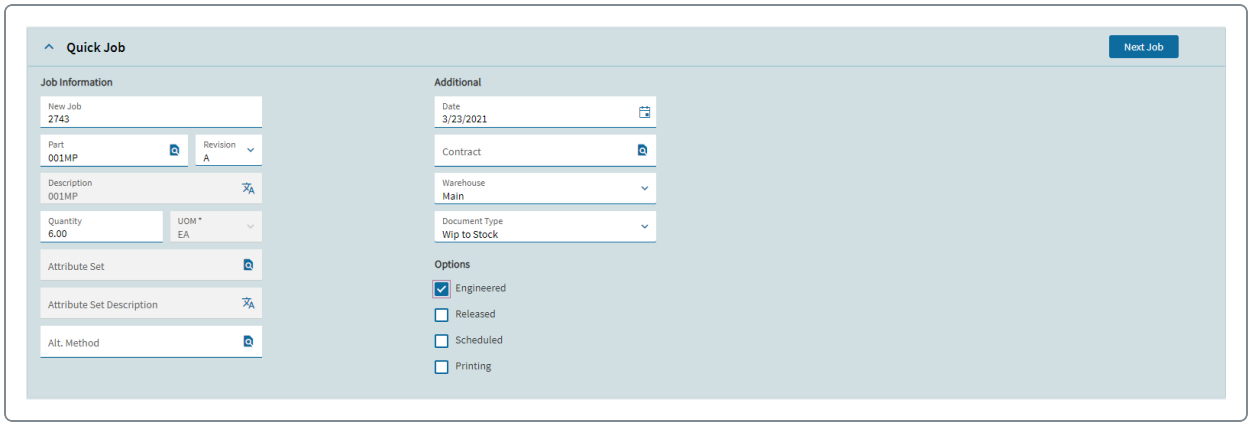


4. Enter the date that the new job must be completed by in the **Due Date** field.
5. Select or enter the **Split Target**values.
6. Select **Save**.

Using Quick Job Entry

With the **Quick Job Entry** app, you can create, engineer, schedule, and release a job through one screen. This app is valuable when you have several jobs for stocked parts that do not have a lot of detail, and you want to enter them quickly. The app uses the reference designators associated with the method of manufacture when creating a new job record.

1. Open the **Quick Job Entry** app.
2. Select **Next Job**to add a new job.
3. Select the part search icon to find and select the part.
4. Enter the quantity for the job.
5. Select the check boxes if required:
    - **Engineered** - Select the check box if you want to engineer a newly created job record.
    - **Released** - Select this check box if you want to release a newly created job record.
    - **Scheduled** - Select this check box if you want to schedule a newly created job record.
    - **Printing** - Select this check box if you want to mass print the created job. Once the job is created using this app then the 'Mass Print' check box is selected in the 'Job Entry' app.



6. Select **Save**.

Running the RoHS Job Compliance Process

Run the **RoHS Job Compliance Process** to complete adding restricted substances for a part.

Issued materials and subcontract operations are included during the process run. Issued materials are verified if the part is compliant or if the supplier or supplier part is compliant (even if the part is not). Subcontract operations are verified if the supplier, operation master, or supplier subcontract operation is compliant.

The **Selections** parameters include:

- **Compliance Verification** - Indicates which compliance verification will be processed. You can run the process against jobs which contain parts that either engineered, the **Engineering** option, or manufactured, the **Built** option.
- **Processing Options** - Select how you want the process to run. You can select **Net Change**, which only updates records either updated or added since the last process run or **Regenerative**, which verifies all the current restricted substances within Kinetic.
- **Filter Summary** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Last Run** - Specifies the date, time, and user ID so you know when and by whom was the process run.
- **Schedule** - Indicates when you want to run the process. If you select something other than Now, the Recurring check box is available.
- **Recurring** - Select this check box if you want the process to run on a repeating basis. This check box is only available if you select the schedule other than Now.

Tu run the process:

1. Open the**Job Entry** app.
2. Select a job.
3. From the Overflow menu , select **Job > RoHS Compliance**.
4. Define the options.
5. Select **Process**.

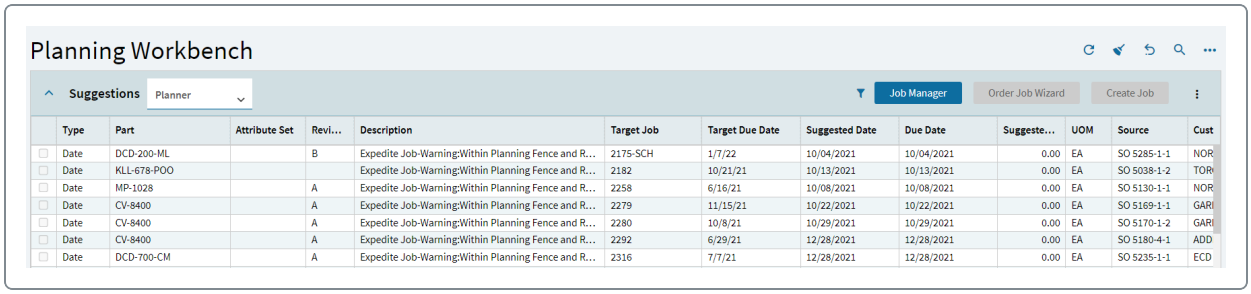
Using Planning Workbench

Create new jobs or make changes to the supply/demand links on existing jobs with the **Planning Workbench** app. You first find and select suggestions based on current sales orders. Then, you create jobs and define the demand links by launching programs from the **Planning Workbench**.

If your company uses the **Material Requirements Planning (MRP)** module, the application can also create suggestions not linked to sales orders. .

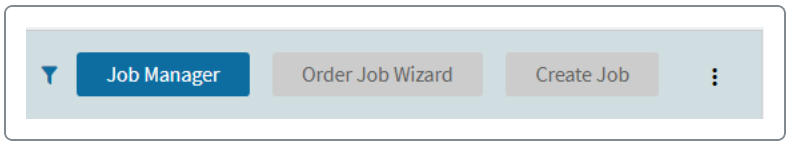
Selecting and Acting on Planning Suggestions

1. Open the **Planning Workbench** app.
2. Select the suggestion on the **Suggestions** card.



Type	Part	Attribute Set	Revi...	Description	Target Job	Target Due Date	Suggested Date	Due Date	Suggeste...	UOM	Source	Cust
Date	DCD-200-ML		B	Expedite Job-Warning:Within Planning Fence and R...	2175-SCH	1/7/22	10/04/2021	10/04/2021	0.00	EA	SO 5285-1-1	NOR
Date	KLL-678-POO			Expedite Job-Warning:Within Planning Fence and R...	2182	10/21/21	10/13/2021	10/13/2021	0.00	EA	SO 5038-1-2	TOR
Date	MP-1028		A	Expedite Job-Warning:Within Planning Fence and R...	2258	6/16/21	10/08/2021	10/08/2021	0.00	EA	SO 5130-1-1	NOR
Date	CV-8400		A	Expedite Job-Warning:Within Planning Fence and R...	2279	11/15/21	10/22/2021	10/22/2021	0.00	EA	SO 5169-1-1	GAR
Date	CV-8400		A	Expedite Job-Warning:Within Planning Fence and R...	2280	10/8/21	10/29/2021	10/29/2021	0.00	EA	SO 5170-1-2	GAR
Date	CV-8400		A	Expedite Job-Warning:Within Planning Fence and R...	2292	6/29/21	12/28/2021	12/28/2021	0.00	EA	SO 5180-4-1	ADD
Date	DCD-700-CM		A	Expedite Job-Warning:Within Planning Fence and R...	2316	7/7/21	12/28/2021	12/28/2021	0.00	EA	SO 5235-1-1	ECD

3. Based on the suggestion generated by the app, select one of the available options from the **Overflow** menu to perform an action for the selected demand transaction.



- Select the **Job Manager** to launch this suggestion within the **Job Manager** program. You use this program to define the supply and demand links for the suggestion. To learn more about this program, review the **Job Manager** article.
- Select the **Order Job Wizard**to launch **Order Job Wizard**. Use this app to generate a job based on the selected order. To learn more about this app, review the **Order Job Wizard** article.

This button is inactive unless you select a record in the **Suggestions** grid.

- Instead of using the **Order Job Wizard**, you can select the **Create Job**to generate the job. A panel displays that creates the job record. The next section describes how to use this window.

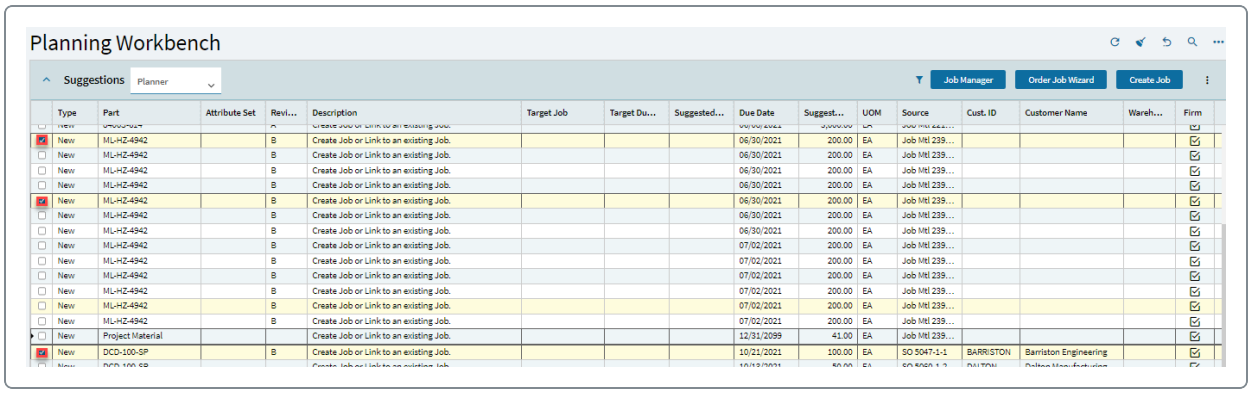
> This button is inactive unless you select a record in the **Suggestions** grid.

4. Select **Save**.

Creating Jobs

Next, learn how to create a job using the 'Planning Workbench' app.

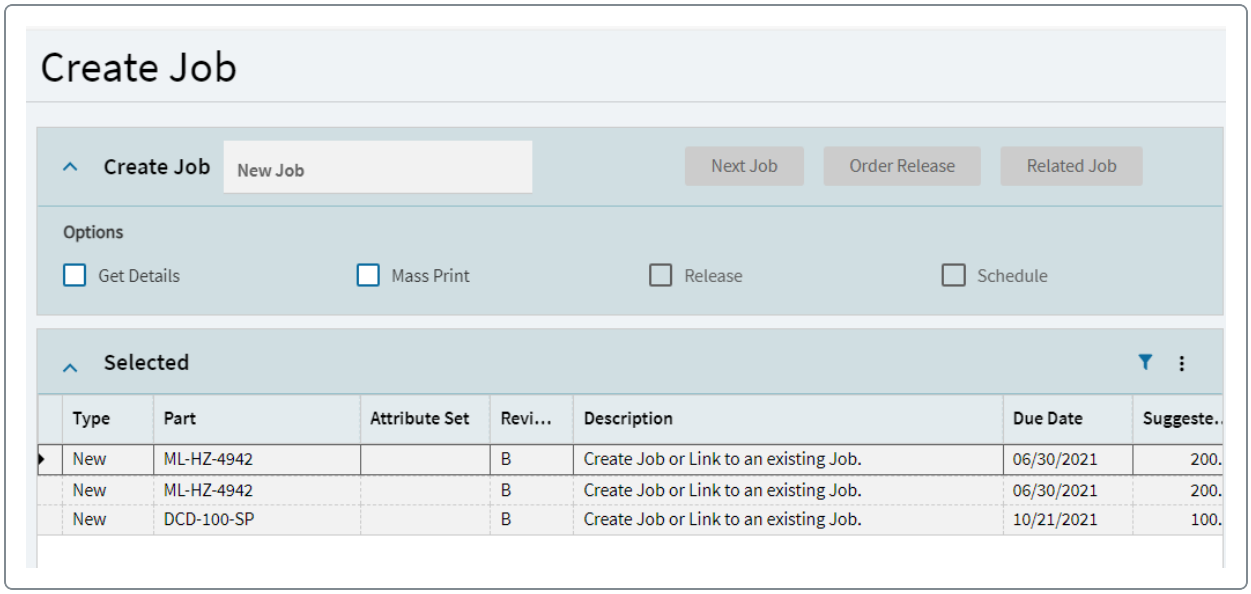
1. Select a suggestion or suggestions.



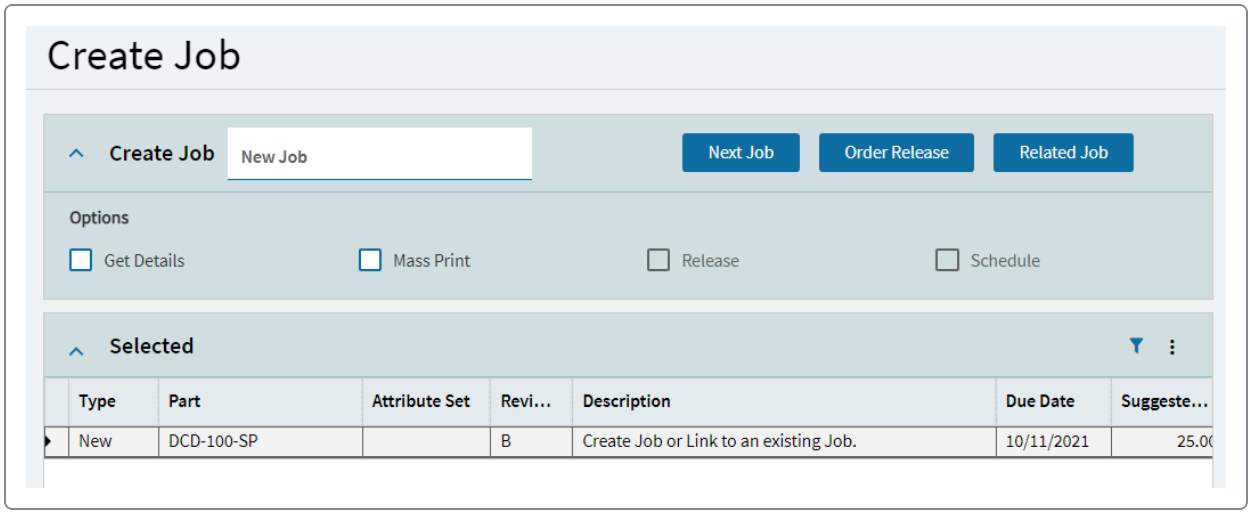
> In this example we selected '3' suggestions.

2. Select the **Create Job** button.

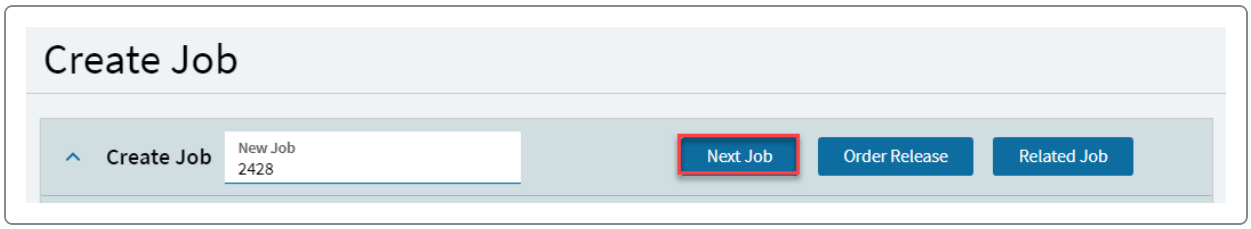
The **Create Job** panel opens.



Notice the Next Job, Order Release, and Related Job buttons are inactive. This is because we selected '3' suggestions. If we selected a single suggestion then the button would be active.



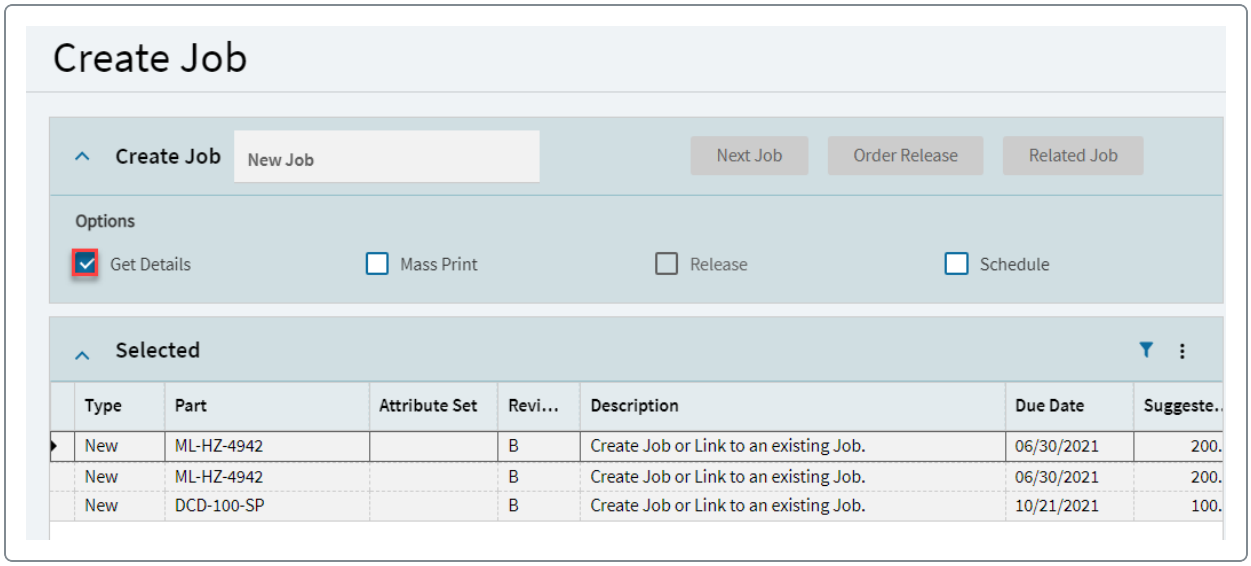
In such case, you would select the **Next Job** button.



Kinetic would generate a new job number. You could also select the **Order Release** button to use the sales order number, line number, and release number for the new job number. If this suggestion is from another job, select the **Related Job** button.

3. To pull the current method of manufacturing for the part, select the **Get Details** check box.

   The **Schedule** check box activates.



4. If you want the new job placed in the production schedule, select the **Schedule** check box.

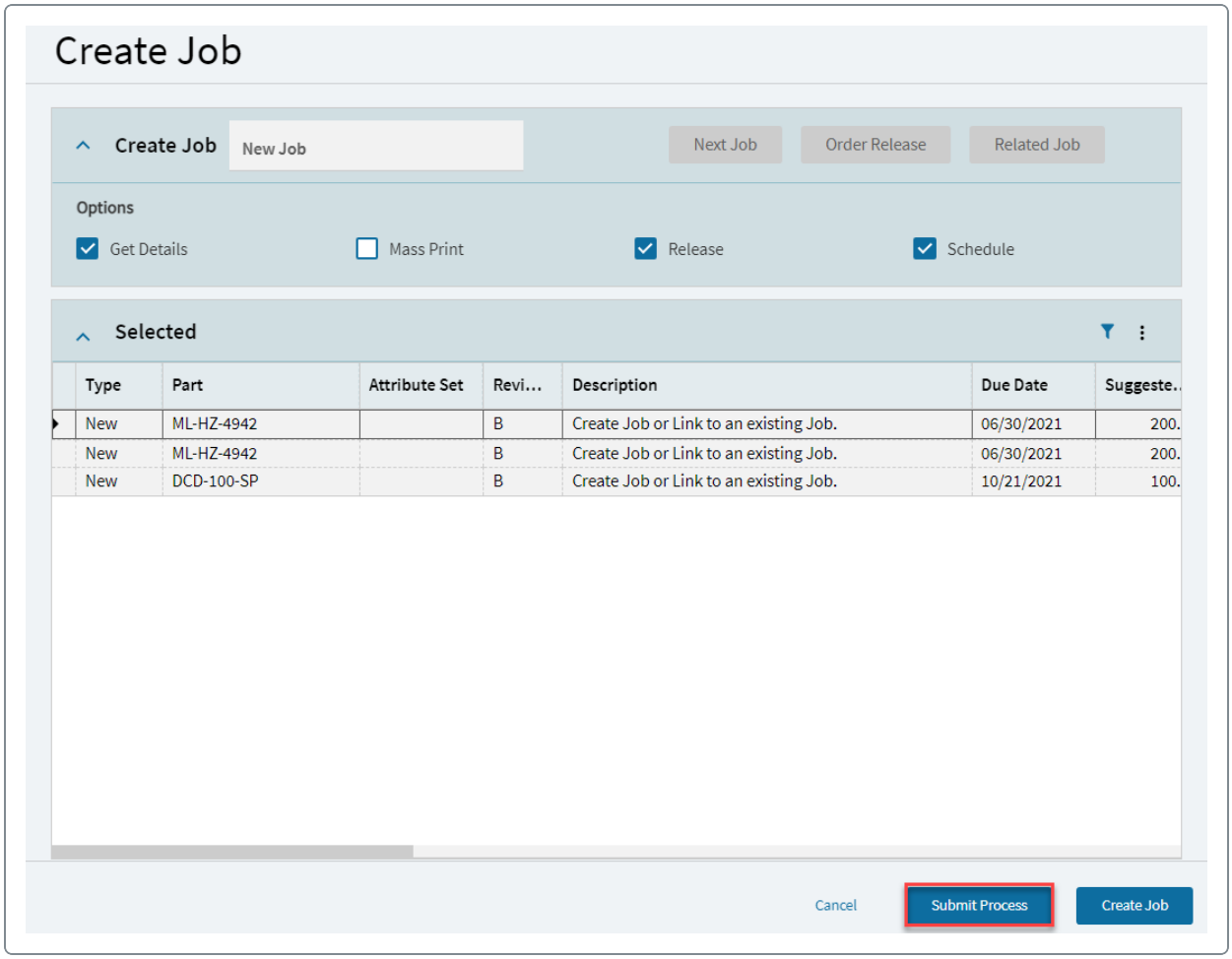
   The **Release** check box now activates.

5. Select the **Release** check box, if you want to indicate that production can start on this job.

6. Select the **Mass Print** check box to indicate this job can be included in batch printing.

   Some reports, like the **Job Traveler**, can be set to print all the jobs that currently have this check box selected; these jobs then all print at the same time.

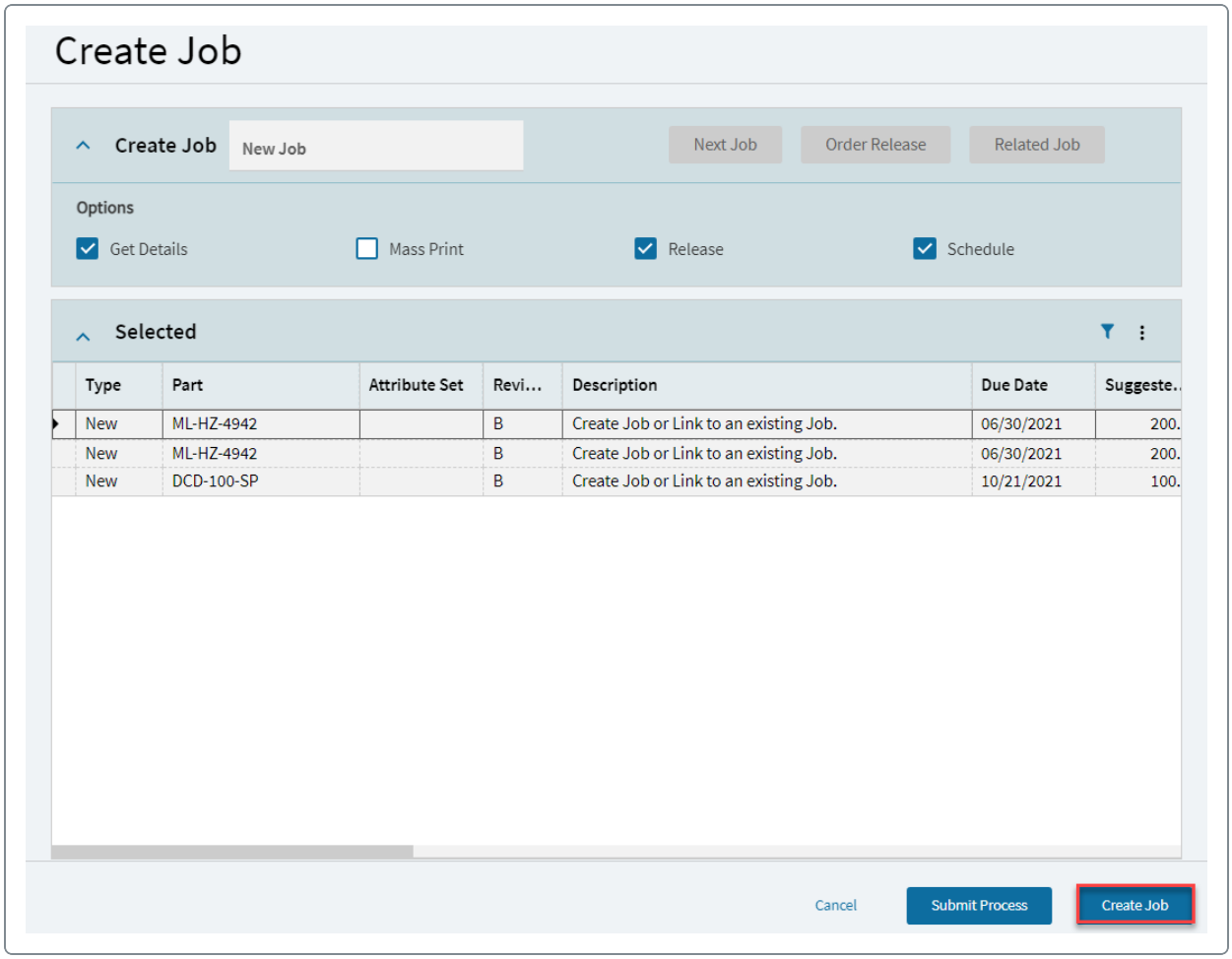
7. Select the **Submit Process** button to generate jobs through background processing.



While this job process runs, you can continue to work in the app. You can then review these jobs in **Job Entry**, **Job Tracker**, or other tracker and job management apps.

8. If you select the **Create Job** button then Kinetic will generate the jobs right away.

In this case it would generate '3' jobs.



9. Exit the Planning Workbench app.

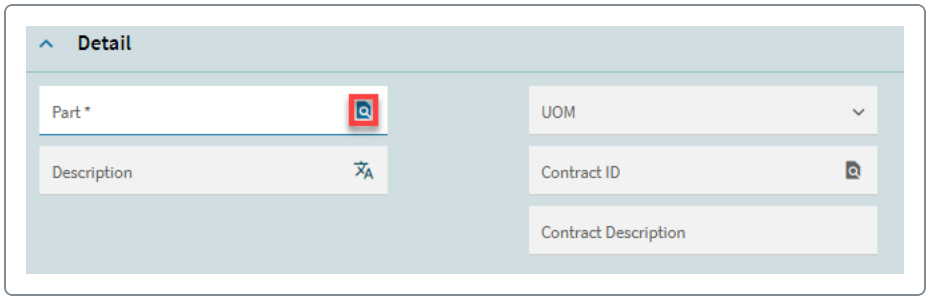
Using Job Manager

Use the **Job Manager** app to easily control the manufacturing of a specific part. You use this app to review a part's current demand. You can then create new jobs or link existing jobs to satisfy this demand. You can also remove supply and demand links you no longer need.

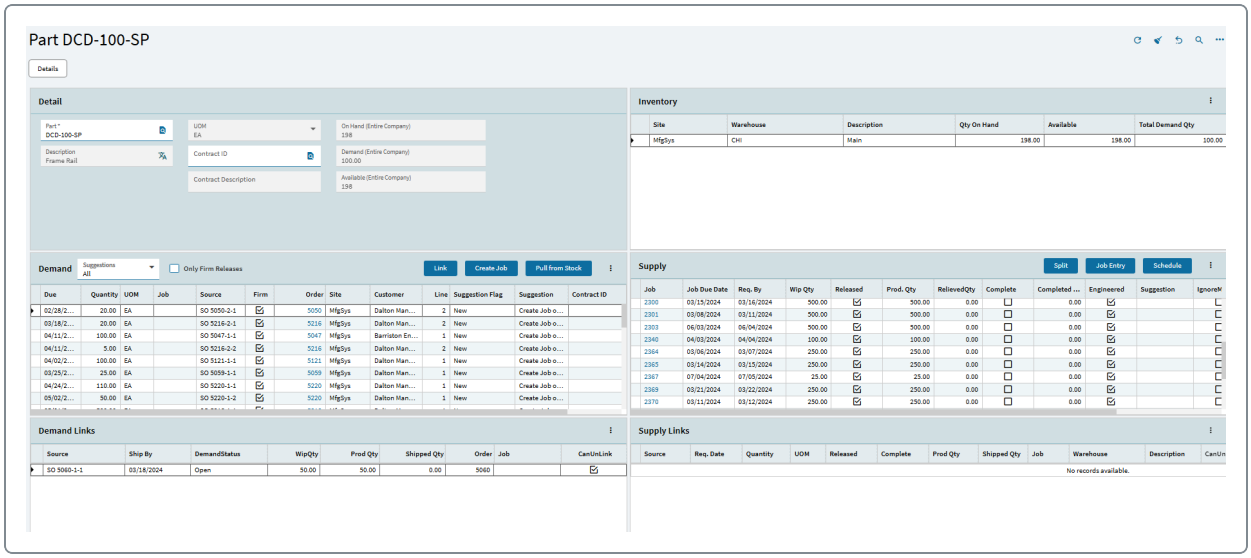
To use the 'Job Manager' app:

1. Open the **Job Manager** app.

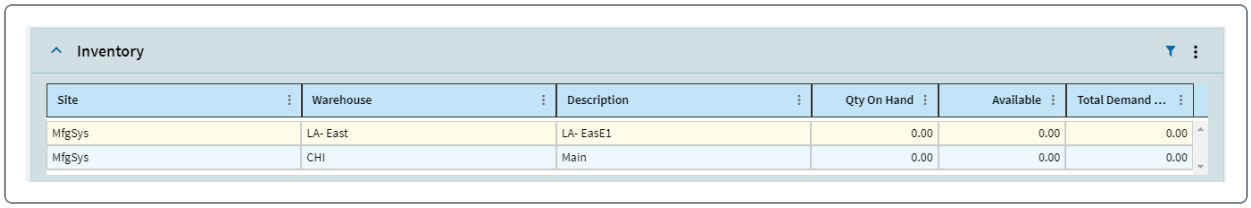
2. Search for and select a part.



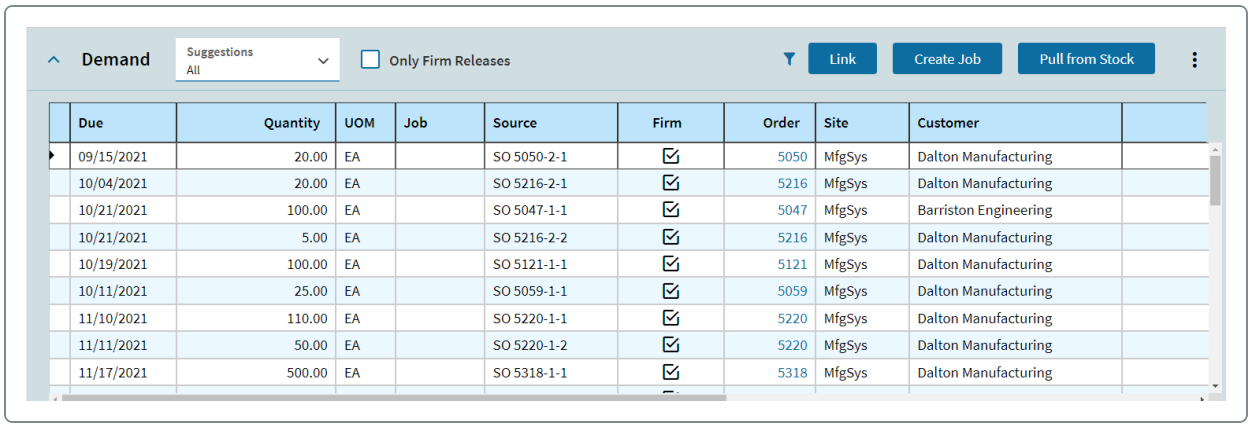
In this case, we selected part **DCD-100-SP**.



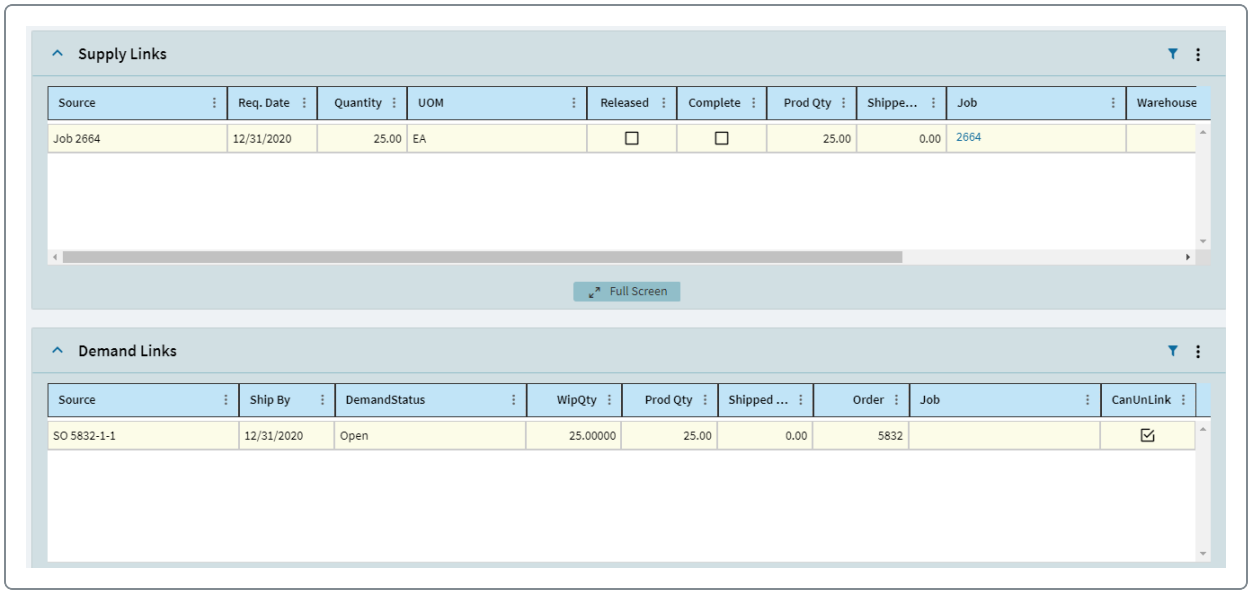
3. Review the inventory information for a specific part using the **Inventory** card.



4. Review the demand information for a specific part using the **Supply** card.



5. Review the **Supply Links** and **Demand Links** cards.



6. Select **Save**.

Changing Job Statuses

Run **Job Status Maintenance** to view or change the status of a job. This app is useful for reviewing the status of several jobs at once.

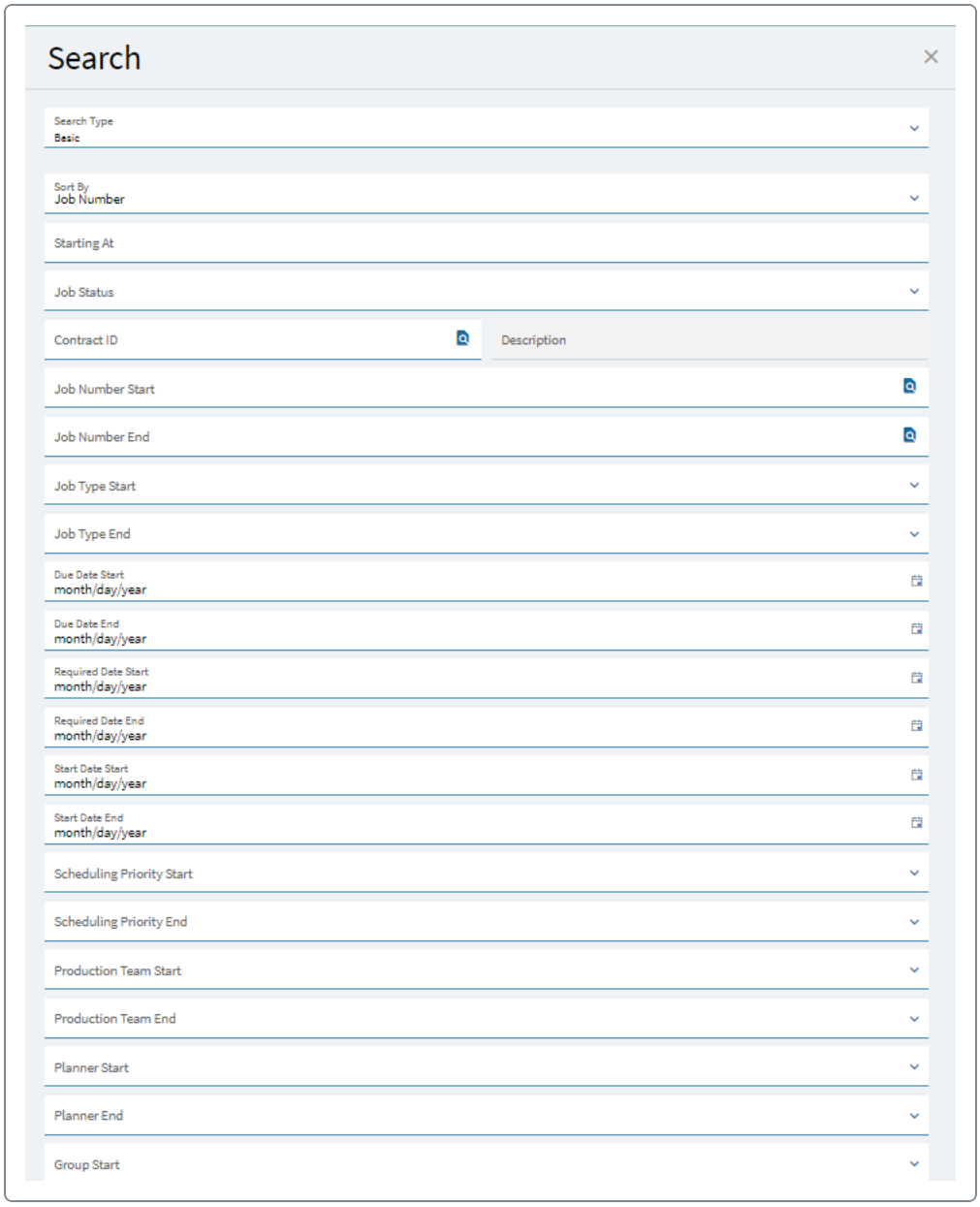
To review or change the job status:

1. Open the **Job Status Maintenance** app.

   The **Job Status Maintenance** app opens with the **Search** panel in view.

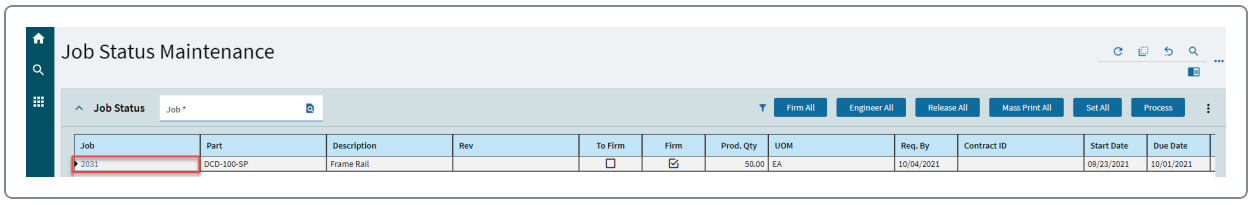
   About the Search Panel

   The 'Search' panel allows you to search for a job or jobs using a set of filter related fields to narrow down your job search. For example, you want to retrieve only jobs with a specific 'Due Date'. In this case, you would use the 'Due Date Start' and 'Due Date End' fields. However, you can use other 'Search' fields depending on what job(s) you want to retrieve.



2. Using the **Search** panel, select a job or set of jobs you want the app to retrieve.

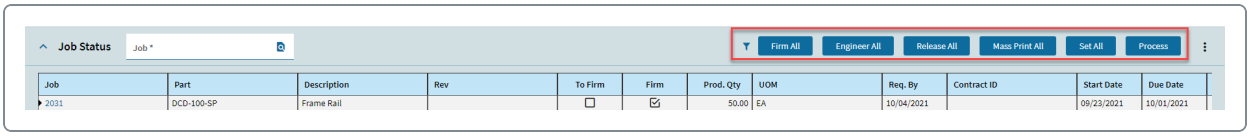
   The **Job Status** card displays.



In this example, we retrieved job '2031'. However, this is just an example.

The card shows you the basic information about the retrieved job(s). It shows you the 'Start' and 'Due' dates, 'Production Quantity', and whether the job(s) is 'Engineered' and 'Released'.

3. Depending on what job(s) you have retrieved, use the button located on the card to firm, engineer, release or mass print the job(s).

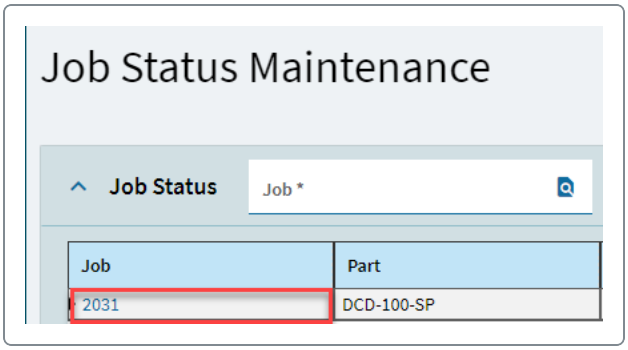


These are the available icons:

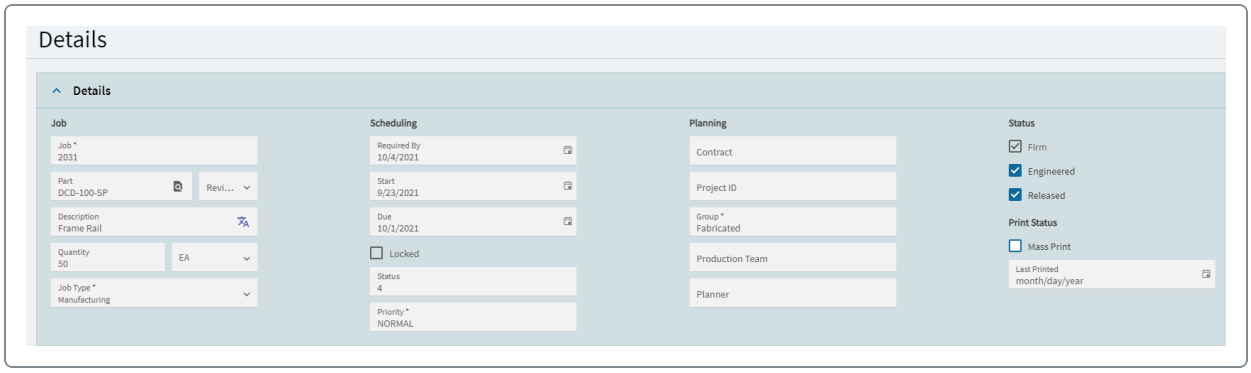
- **Firm All** - Select this icon to firm all the jobs listed in the Job Status grid.
- **Engineer All** - Select this icon to engineer all the jobs listed in the Job Status grid.
- **Release All** - Select this icon to release all the jobs listed in the Job Status grid.
- **Mass Print All** - Select this icon to mass print all the jobs listed in the Job Status grid.
- **Set All** - Select this icon to set all the jobs listed in the Job Status grid.
- **Process** - Select this icon to process all the jobs listed in the Job Status grid.

4. Next, click the job link in the **Job** column.

The **Details** page with the **Details** card displays.



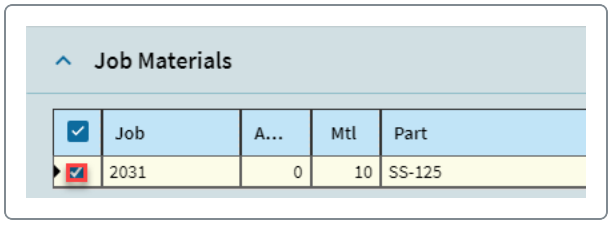
The card shows information about the selected job. This includes part, description, revision, quantity, scheduling, printing and status information.



5. Scroll down to locate and expand the **Job Materials** card.

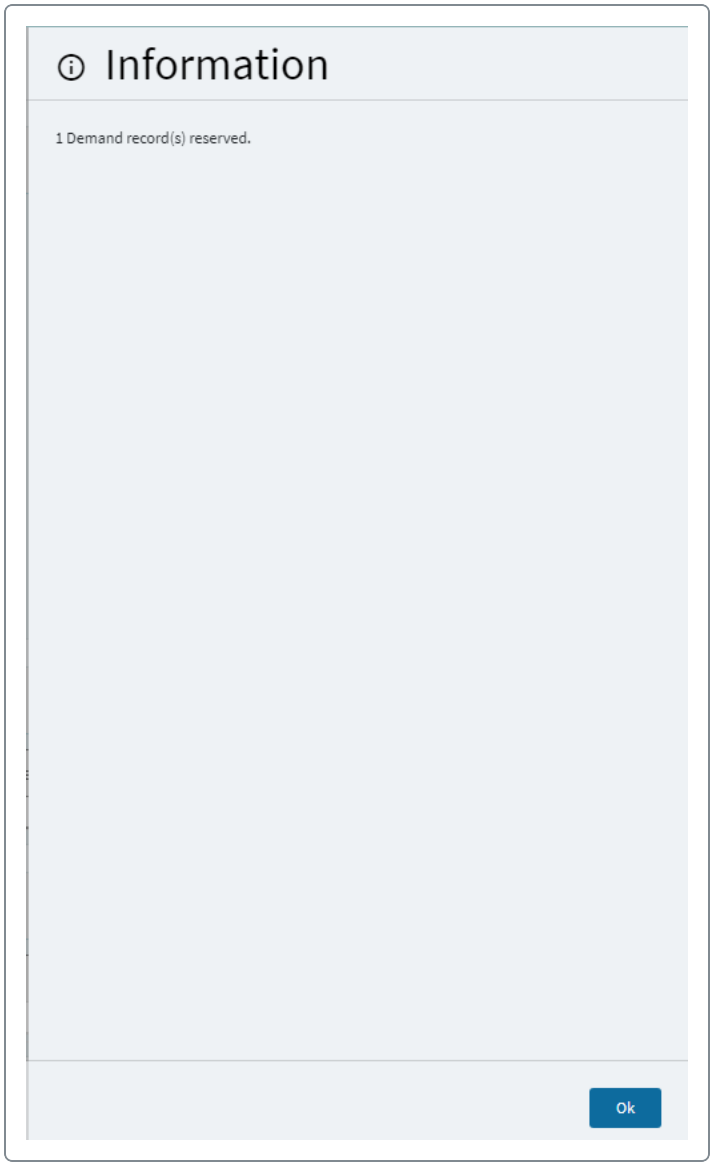
   The card allows you to 'Reserve' and 'Allocate' the material(s) of the retrieved job.

6. On the **Job Materials** card, in the grid, select the retrieved job for the 'Material' sequence you want to reserve.



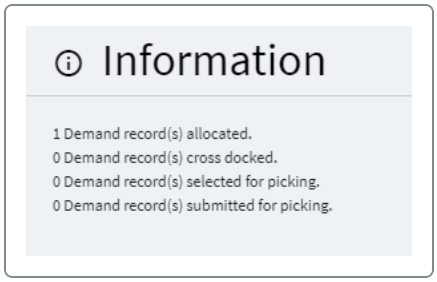
7. Select the **Reserve** button.

   The **Information** panel opens confirming the reservation.



8. Inside the **Information** panel, select **OK**.
9. To allocate the material, select the job and select the **Allocate** button.

The **Information** panel opens confirming the allocation.



10. Inside the **Information** panel, select **OK**.

> If you want to learn more about the 'Fulfillment' functionality in Kinetic, review the article.
>
> If you want to learn more about the 'Automated Fulfillment' functionality in Kinetic, review the article and its related articles.

> To be able to allocate a job material, you must select a template for the site you are working in using the 'Site Configuration Control' app.

11. Scroll down to locate and expand the **Plan As Assembly** card.

    The card allows you to view assemblies that are associated with the selected job that have been designated as 'Plan As Assembly' items.

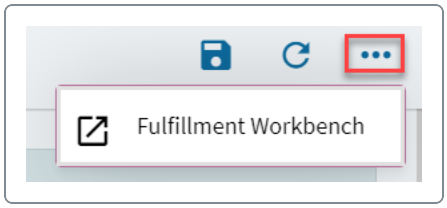
    The **Plan As Assembly** functionality enhances MRP processing by planning lower component manufacturing parts through a direct relationship with the end part. These lower manufacturing parts do not have to be included in the assembly structure. The Plan As Assembly functionality can still account for these demand quantities. It does this by leveraging the multi-level assembly build structure to correctly synchronize demand requirements.

    You can also use its flexibility so that subassembly part quantities can be manufactured to stock or manufactured on a job directly linked to the parent part requirements. Any jobs generated through the Plan As Assembly functionality can be automatically given the firm status through the Auto Job Firm Process. This capability minimizes the impact to standard MRP by using the Pull as Assembly (PAA) logic for creating PAA assemblies, using Auto-Consume stock during the scheduling process, and creating a new process to firm up jobs which breaks off PAA assemblies to separate jobs and creates the material demand links.

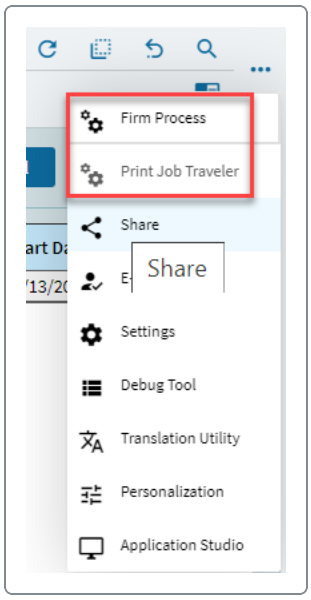
    This card allows you to add a new job or edit an existing job. It also provides an overview of the job and displays part information, quantities, revision, and due dates. This sheet also contains check box options you select to indicate that the jobs planning is complete.

12. Select **Save**.

If needed, you can launch the 'Fulfillment Workbench' app from the 'Overflow' menu on the 'Details' page. Using the app, you can 'Allocate' and 'Reserve'. To learn more about the concept of 'Fulfillment' in Kinetic, review the article.



13. You can use the **Overflow** menu, to firm the retrieved jobs or to print the **Job Traveler**.



If you run the 'Firm Jobs and Sub-assemblies Process', it changes any un-firm jobs to firm jobs. Firmed jobs can be engineered and released to manufacturing.

The 'Job Traveler Report' explains exactly what is required on a specific job. It divides the operations and materials by the assemblies for the parent job.

14. Exit the Job Status Maintenance app.

Tracking Jobs

The **Job Tracker** keeps you updated with everything that is going on with your part. It provides a summarized view of all the operations and processes linked to the part, the related project, materials. You can drill down to see greater details, such as part locations, shipments, quotes, supplier information, and purchase orders.

Selecting a Job

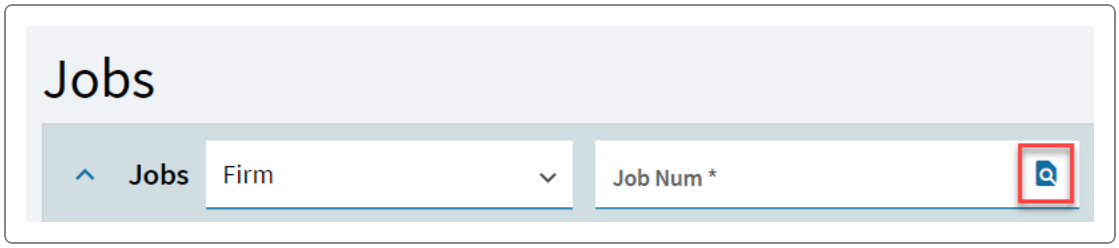
The **Jobs** card contains basic information on the job, performed with the associated material or part. You can review the project credentials, type of the job, staring and closing dates. You also can see the status of the job, as well as the demand information for the part based on the order, stock, and job data.

To access the Jobs data:

1. Open the **Job Tracker** app.

   The **Landing** page displays.

2. Search for and select a job you want to review.

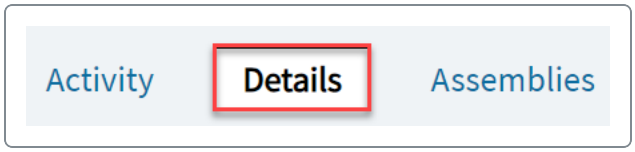


Viewing Job Details

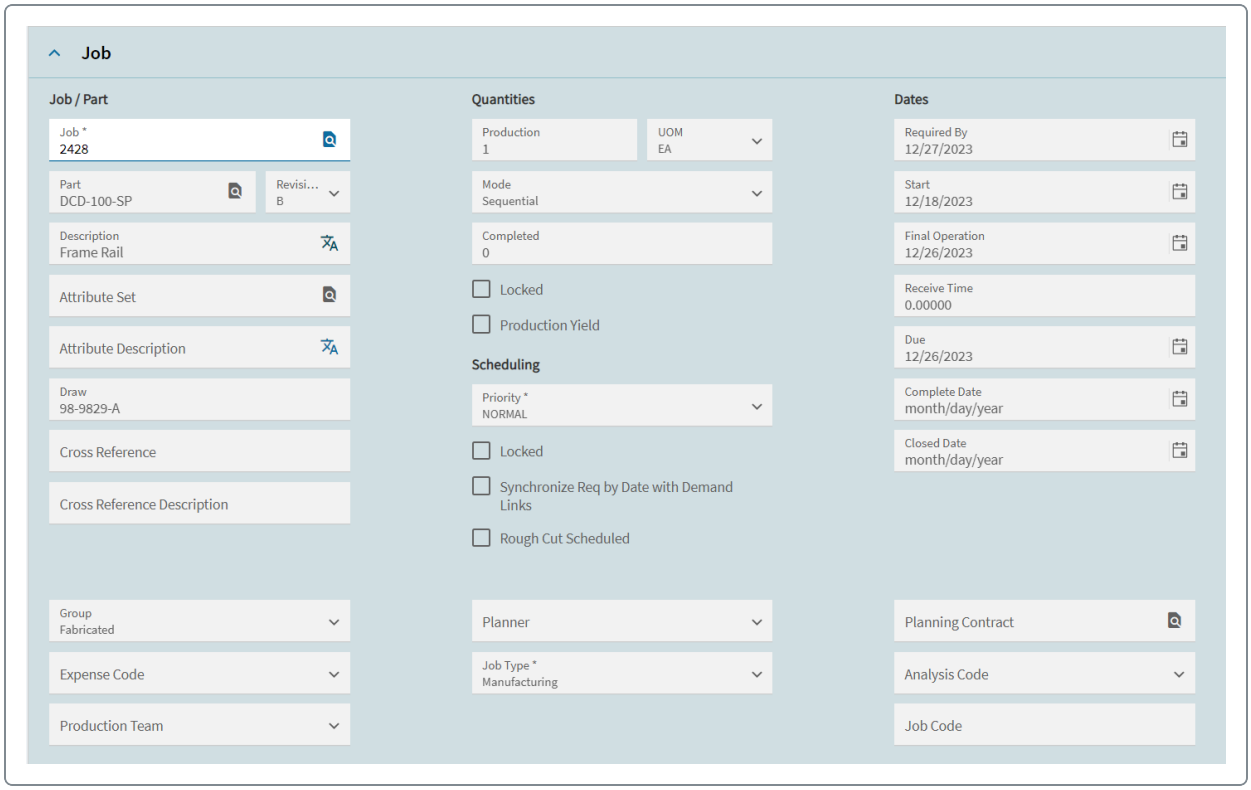
The **Job Details** card provides a comprehensive insight to the information on the current job. You can closely review the data for the materials, operations, assemblies, and subcontracts. When you need to know the overall details of the specific part, refer to this card.

1. Make sure the **Details** page displays.

   This displays the **Job** card.



2. Review the **Job** card.

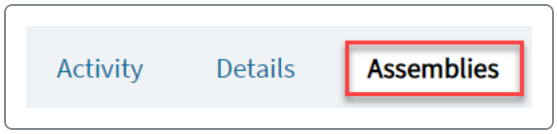


Reviewing a Method of Manufacture

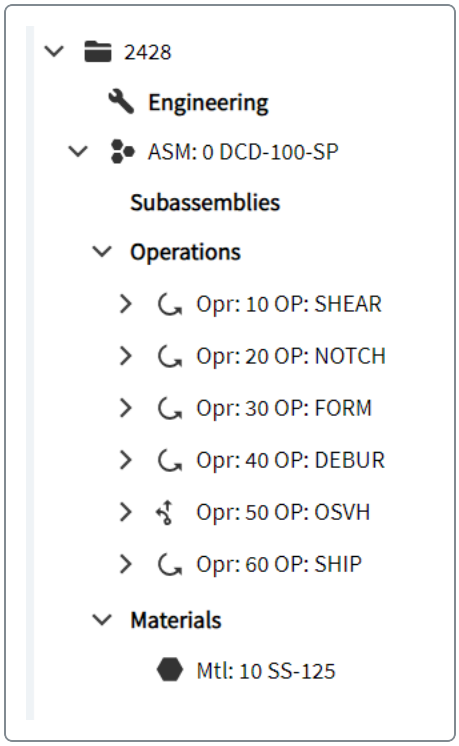
Next, review job's method of manufacture.

1. Select the **Assemblies** page.

   The **Assembly** card displays.

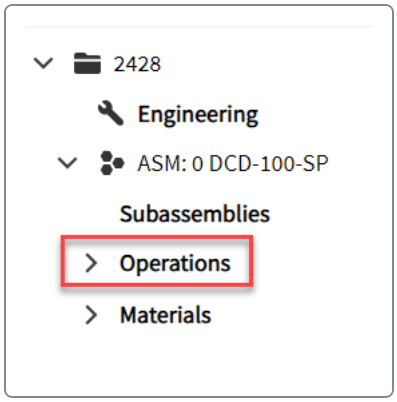


2. Fully expand the Nav tree.



In this case, we expanded the 'Operations' and 'Material' node. The job in this example holds '6' operations and '1' material. However, your method of manufacture may be different.

3. To review all the operations in your method of manufacture, in the Nav tree select the **Operations** node.

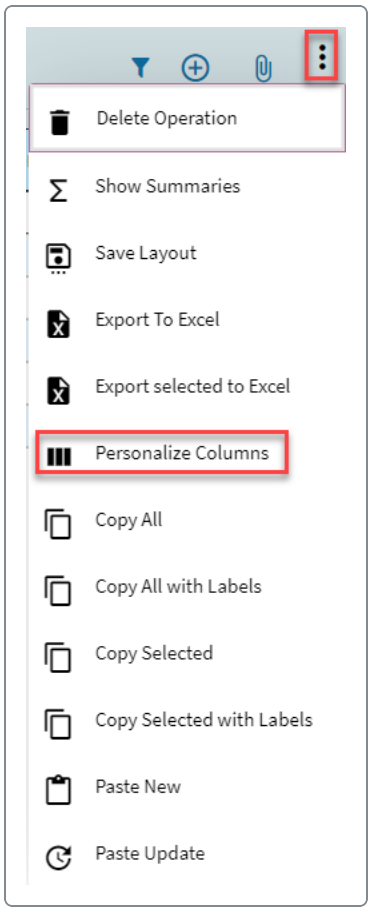


The **Operations** card displays. The card lists all the operations in your method of manufacture.

The card can also display different costing information depending how you personalize columns. To do so:

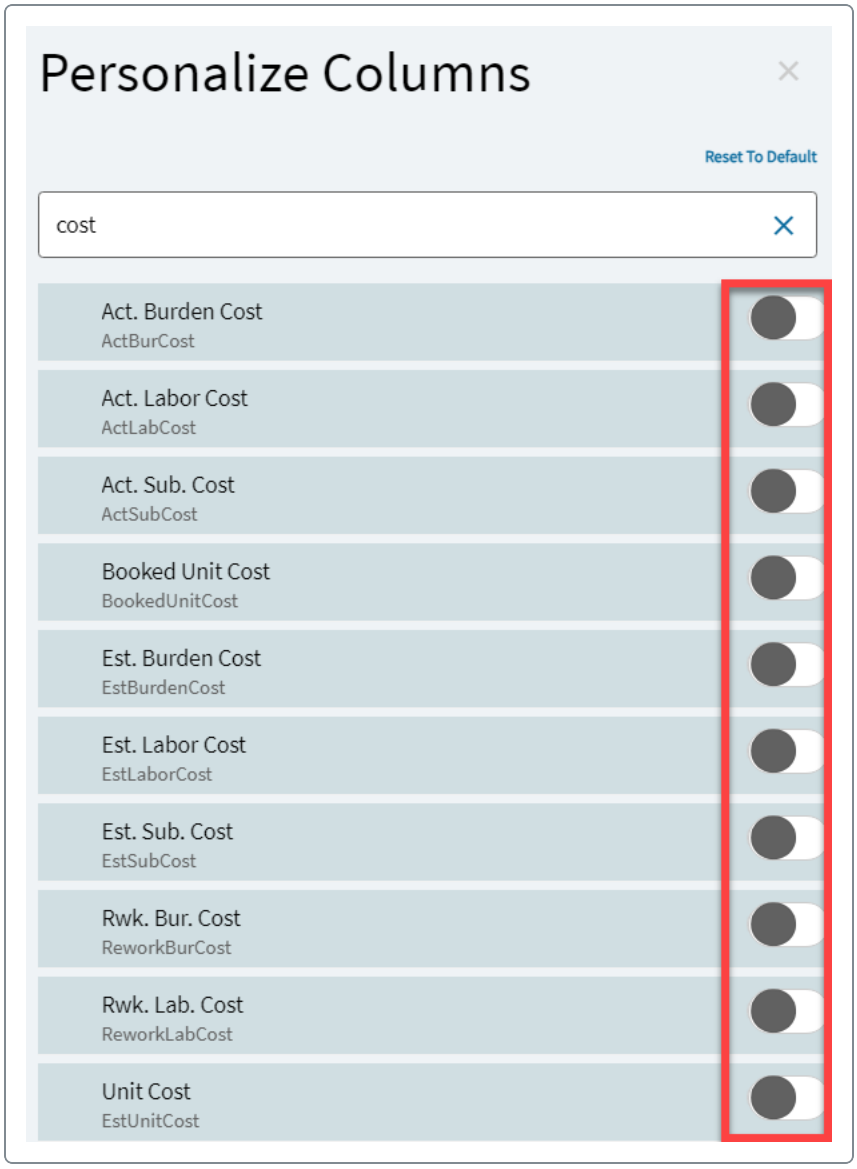
1. Select **Personalize Columns** from the **Overflow** menu.

   The **Personalize Panel** opens.



2. In the **Search** field, enter **cost**.

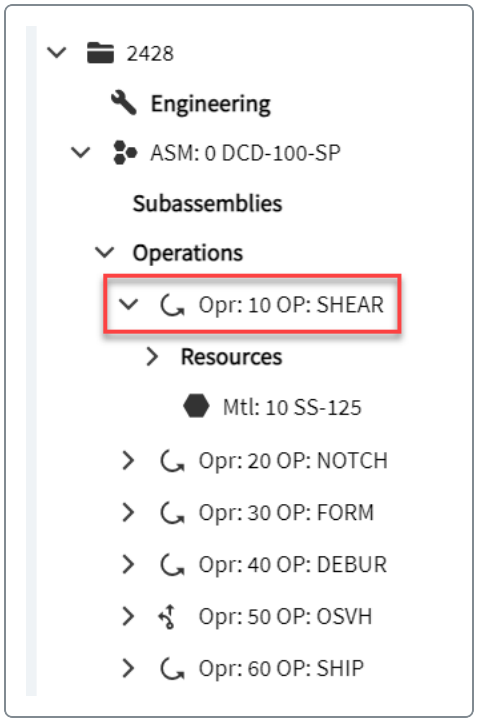
3. Active different **Cost** fields as required by moving the toggle button to the right.



4. Finally, select the **Save** button inside the panel.

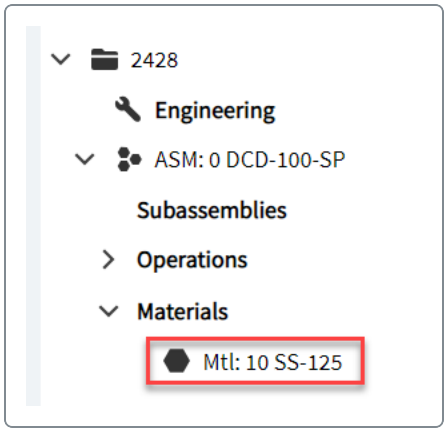
4. To review a specific operation details, select an operation in the Nav tree.

   The **Operation** card displays.



5. Review its details. You can review any operation in your method of manufacture.
6. To review details for a material, select your material in the Nav tree.

   The **Material** card displays.



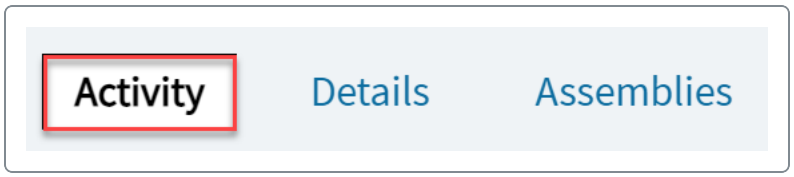
7. Review the material details.

Displaying Miscellaneous Shipments

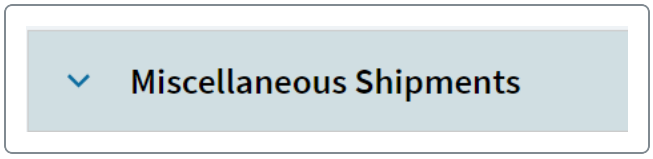
The **Miscellaneous Shipments** card displays packing slips for miscellaneous (non-billable) material. You can also view the slips for the return of discrepant parts to a supplier from a DMR (Discrepant

Material Report) record.

1. Select the **Activity** page.



2. Expand and review the **Miscellaneous Shipments** card.



Reviewing Serial Numbers

The **Serial Numbers** card helps you view the serial number status for the specific part, serial-tracked transactions, location of the particular part, and service information for the parts.

Viewing Part Locations

There are three levels of locations: sites, warehouses and bins. Through these three levels you can easily select the needed part. The **Part Locations** card contains details about Work in Process (WIP), Material, and Inspection part locations by site, as well as location history.

You can view the following information on this card:

- Viewing WIP Information
- Reviewing Material Details
- Displaying Inspection Information
- Viewing Location History

Viewing WIP Information

WIP denotes inventory that has begun the manufacturing process and is currently in production, is no longer included in raw materials inventory, but is not yet a completed product. The **WIP** card lets you review all the part quantities that are currently in process for the selected job.

Reviewing Material Details

On the **Material** card you can view the materials that are currently issued to the job, but have not yet been used in manufacturing. Because of this, these materials still have a location within the site.

Note that you can also hide the production location of each material part quantity. This lets you filter the results so that they only display the warehouse information for each material quantity.

Displaying Inspection Information

Inspection means check-up of the discrepant material found during the job production. This **Inspection** card displays parts that are currently being inspected. These parts are either related to the selected job or the materials being used to manufacture the job.

Viewing Location History

If you need to view the overall location history for the parts, refer to the **Location History** card. Here you can review the locations of all the parts that have so far been either used or manufactured on the selected job.

Using Links

The **Links** card displays all the jobs for which the current job is supplying materials. When the parts are complete on the current job, they will supply materials for the jobs displayed on the Links grid.

Reviewing Manufactured Receipts Details

On the **Mfg. Receipts** card, you can review all the manufacturing receipts created against the current job.

Running the Auto Job Firm Process

Use the **Auto Job Firm Process** to automatically separate Plan as Assembly sub assemblies into a new job when the primary job is firmed up.

When a firm job is selected for processing, the application checks for Plan as Assembly items. When stock is available, the application creates a material record for the subassembly part and designates the due date. The application uses the original job number, plus the assembly number with a demand link to stock based on the MRP parameters.

If the production quantity is 5 and the minium lot size is 100, the system creates an unfirm job for 100 parts. If the production quantity is 279 and the maximum lot size is 100, the system will create 3 unfirm jobs for 100 parts.

When stock is not available, the system creates a material record for the subassembly part with a due date set to Make Direct.

Firming subassemblies also supports non-stock parts. The Auto Job Firm Process firms sub-assemblies that are non-stock. When the non-stock subassembly is firmed it displays as a material on the assembly (parent) job. The new firm job for the non-stock subassembly will be linked to the new material record on the assembly (parent) job.

When MRP deletes and recreates the parent unfirm job, it recognizes that a firm job exists and creates a material record instead of a subassembly. The link of the Plan As Assembly job is updated to the new unfirm job number.

If the assembly part has a bill of materials (BOM) structure defined with a co-part, the Auto Job Firm Process will NOT add the co-part to the firm job. The Auto Job Firm Process strictly copies the assembly BOM from the unfirm job to the firm job.

Running the Auto Job Release Process

Run the **Auto Job Release Process** to automatically release jobs to the floor for processing.

The**Selection**parameters include:

- **From** and **To** - Enter the date range for the job start dates that you want to run the release job process on.
- **Dynamic** - Specifies whether you want to run the process by a dynamic option or by a specific date. When selected, the date fields display a list of options instead of the calendar.
- **Select for Mass Print** - Select this check box if you want to print all jobs marked as released during a mass print of the job traveler.
- **Schedule** - Indicates when you want to run the process. If you select something other than Now, the **Recurring** check box is available.
- **Recurring** - Select this check box if you want the process to run on a repeating basis. This check box is only available if you select the schedule other than Now.
- **Log Filename** - Specifies the location of the log file.

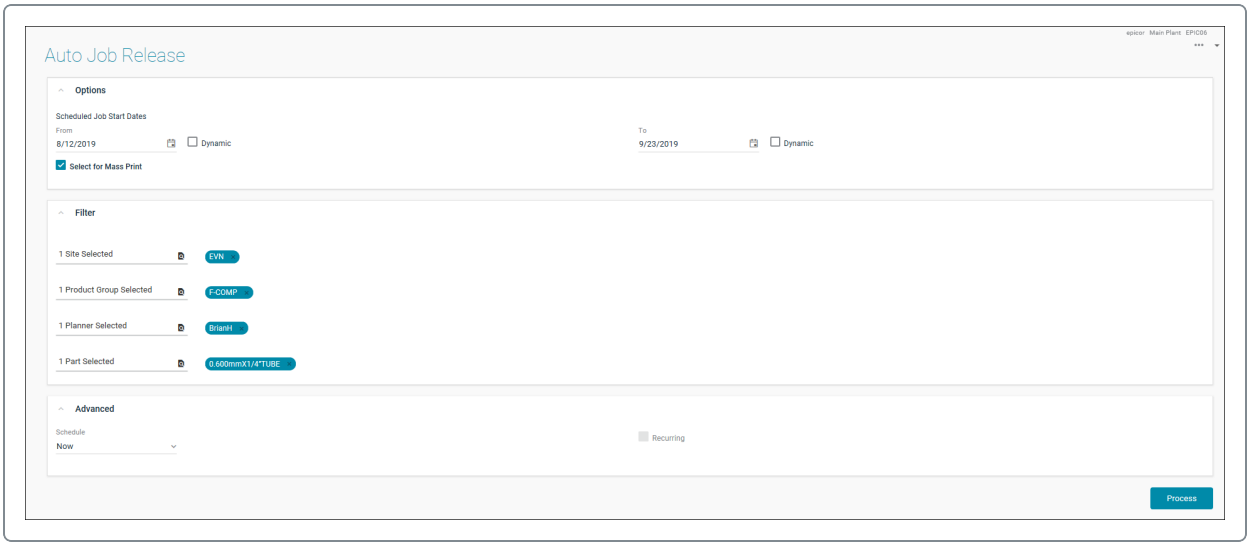
To run the process:

1. From the main menu, go to **Production Management > Job Management > General Operations > Auto Job Release**.
2. Enter the required dates in the **From** and **To** fields.
3. Select the **Dynamic** check box to run the process by a dynamic option.
4. In the **Options** pane, select the **Select for Mass Print** check box, if required.
5. Review additional process parameters in the **Filter Summary** pane.

The **Sites**, **Product Groups**, **Planners** and **Parts** fields default with **All Selected**. To change the defaults, navigate to the **Filter > Site**, **Filter > Product Group**, **Filter > Planner** and **Filter > Part** tabs respectively.

6. Select scheduling details. You can optionally select the **Recurring** check box to regularly run this process.
7. Select or enter a **Log Filename.**
8. Select the **Save Process Set** icon if you want to add these items as tasks to a process set.
9. In the **Save To Process Set** window, select a **Process Set**, and then hit **OK** or **Cancel**.
10. Select **Process**. 

You can run Auto Job Release manually, or schedule this process to run automatically. You can also attach the process to a schedule to allow the production planner to automatically release jobs to the floor.


epicor Main Plant EPIC06
Auto Job Release
Options
Scheduled Job Start Dates
From
8/12/2019
Dynamic
To
9/23/2019
Dynamic
Select for Mass Print
Filter
1 Site Selected
EVN
1 Product Group Selected
F-COMP
1 Planner Selected
BrianH
1 Part Selected
0.600mmX1/4"TUBE
Advanced
Schedule
Now
Recurring
Process

Lean Metrics

Lean Manufacturing is a process that eliminates waste and cost through a continuous production flow measured by customer demand. Use the Production Activity process both to establish lean performance metrics and to automatically capture production data through shop floor transactions. The data you capture through this process can then be analyzed as needed against any lean performance metrics you define.

To plan the manufacturing process, you must set up the application so it optimizes customer demand and eliminates waste. The metrics you define in the lean metrics setup programs contain key information for your lean manufacturing processing. Configuring lean production activity metrics assists you in generating the Production Activity records you need and also minimizes data entry.

Production Activity Day Maintenance

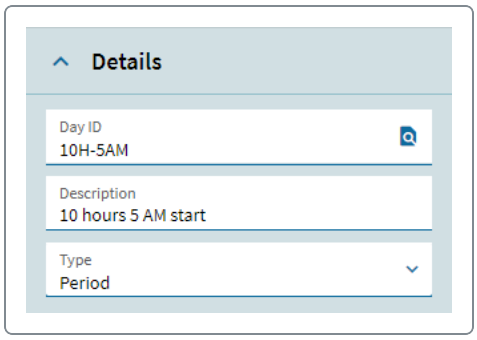
Establish a work pattern for each day using **Production Activity Day Maintenance**.

In this application, define the type of a day, and assign a code to identify it. Then define details for the different periods/shifts of the day.

Creating a Production Activity Day Code

1. From the main menu, go to **Production Management > Job Management > Setup > Production Activity Day**.
2. Select **New** to add a new day.
3. In the **Day ID** field, enter a unique code to identify a production activity day pattern. For example, **10H-5AM**.
4. In the **Description** field, enter an explanation of the code. For example, **10 hours 5 AM start**.
5. Select a Type: **Period** or **Shift**.

   If you select Period, you can enter period details for the production activity day. Likewise, if you select Shift, you can enter shift details.



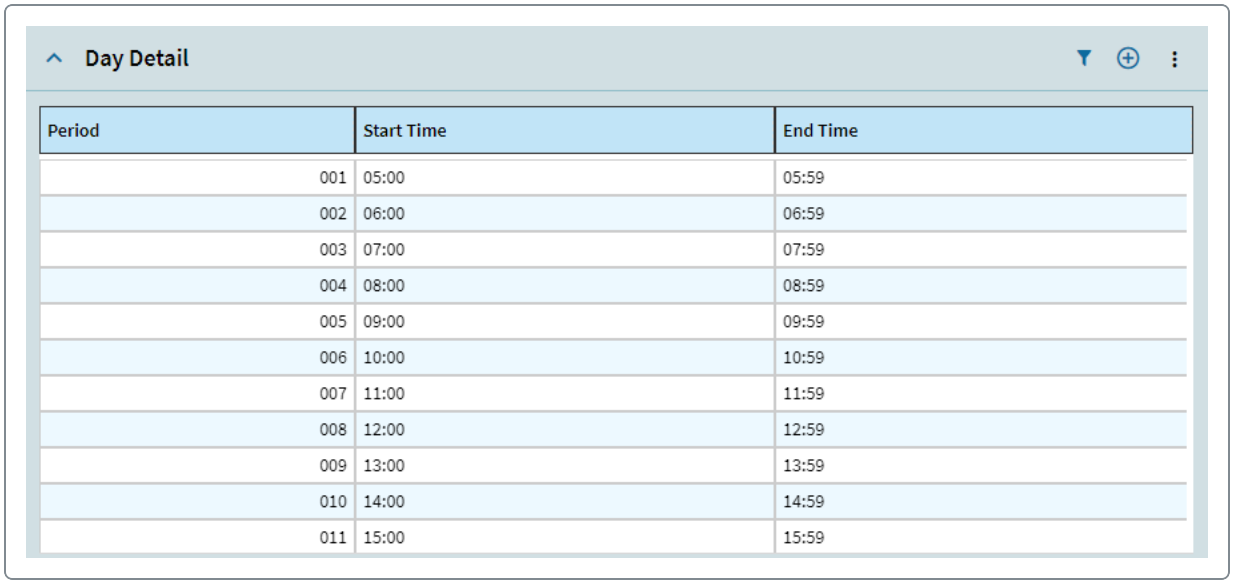
6. Select **Save**.

Entering Details for an Activity Day Code

If your day is of the **Period** type.

1. On the **Day Detail** card, for each period in the day, enter a **Period** number and a **Start Time** and **End Time**. For example, **Period 1** begins at **5:00** and ends at **5:59**.

2. Enter details for all the periods.
3. Select **New** to add more periods, if required.

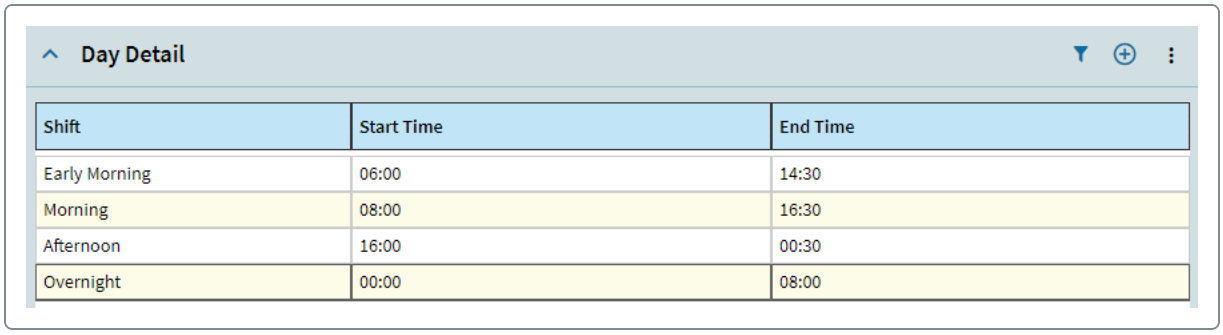


Period	Start Time	End Time
001	05:00	05:59
002	06:00	06:59
003	07:00	07:59
004	08:00	08:59
005	09:00	09:59
006	10:00	10:59
007	11:00	11:59
008	12:00	12:59
009	13:00	13:59
010	14:00	14:59
011	15:00	15:59

4. Select **Save**.

If your day is of the **Shift** type.

1. On the **Day Detail** card, for each shift in the day, select a **Shift** identifier and a **Start Time** and **End Time**. For example, **Early Morning** begins at **6:00** and ends at **14:30**.
2. Enter details for all the shifts.
3. Select **New** to add more shifts, if required.



Shift	Start Time	End Time
Early Morning	06:00	14:30
Morning	08:00	16:30
Afternoon	16:00	00:30
Overnight	00:00	08:00

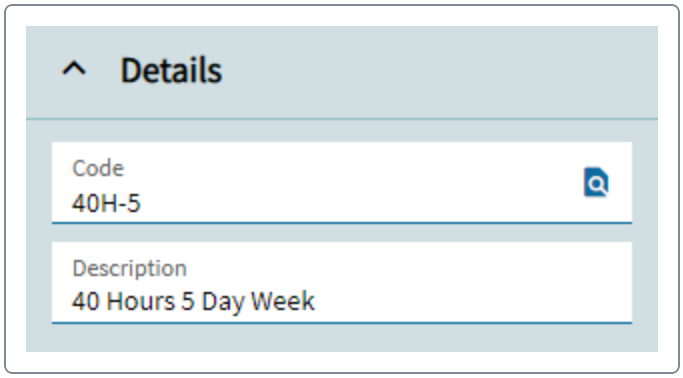
4. Select **Save**.

Establishing Weekly Work Patterns

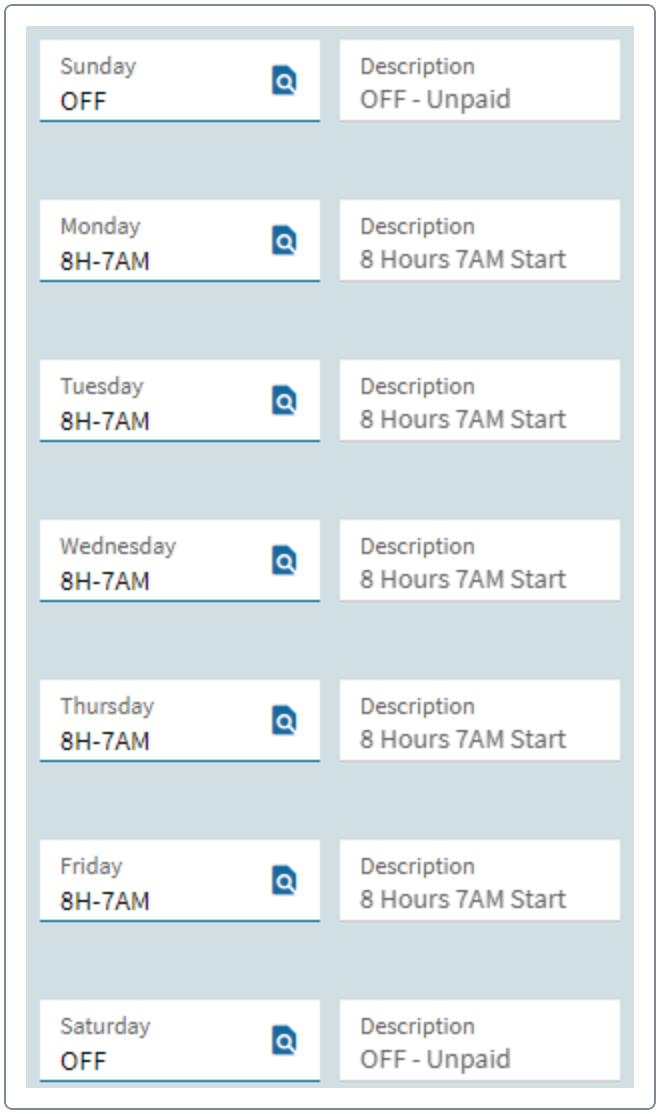
Establish weekly work patterns for employees in **Production Activity Week Maintenance**.

Each day of the week has a designated day code, and the combination of the day codes creates a pattern for the week. This pattern is flexible and allows you to incorporate typical work week variables to accommodate different production hours when necessary, such as weekends or seasonal work.

1. From the main menu, go to **Production Management > Job Management > Setup > Production Activity Week**.
2. Select **New** to create a new record. The **Details** page opens.
3. In the **Code** field, enter an identifier for the week. For example, **40H-5**.
4. In the **Description** field, enter more information to identify the week definition. For example, **40 Hours 5 Day Week**.



5. For each day in the week, select a production activity day pattern, like **8H-7AM**. This defines the number of hours and the start time of the workday.



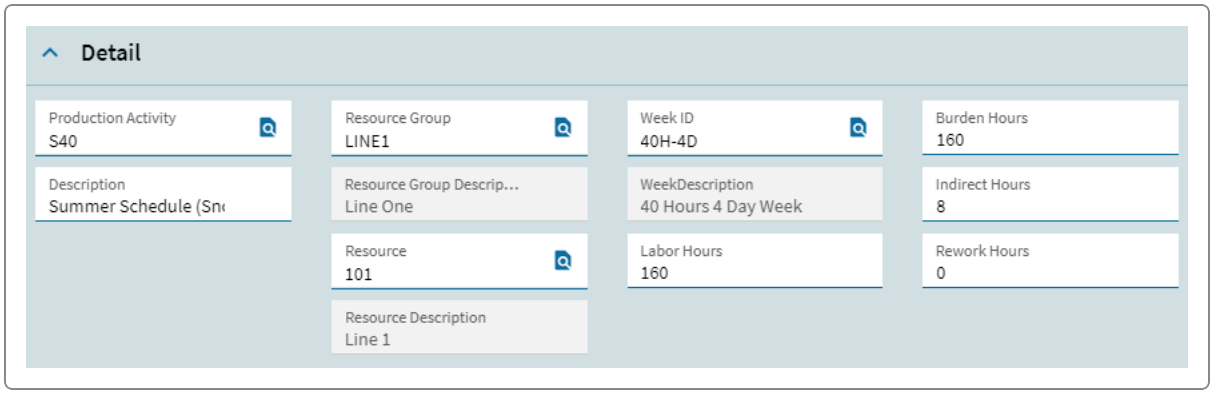
6. Select **Save** .

Creating Production Activity Plans

You can define a production plan for your manufacturing organization, including manufacturing quantity, week patterns, resource groups, and other necessary work patterns per period. It is useful when accounting for seasonal or other factors that can affect production. You enter production activity plans in **Production Activity Plan Maintenance**.

Entering a Production Plan

1. From the main menu, go to **Production Management > Job Management > Setup > Production Activity Plan**.
2. Select **New** to add a new plan.
3. Enter a unique identifier for the production plan in the **Production Activity** field.
4. In the **Description** field, enter additional information to identify the production plan.
5. In the **Resource Group** field, specify a resource group for this production plan. You can use the search or enter the resource group directly.
6. In the **Resource** field, assign a resource to the production plan.
7. In the **Week ID** field, select an activity week pattern for this plan.
8. Specify an estimated number of **Labor Hours**, **Burden Hours**, **Indirect Hours**, and **Rework Hours**.

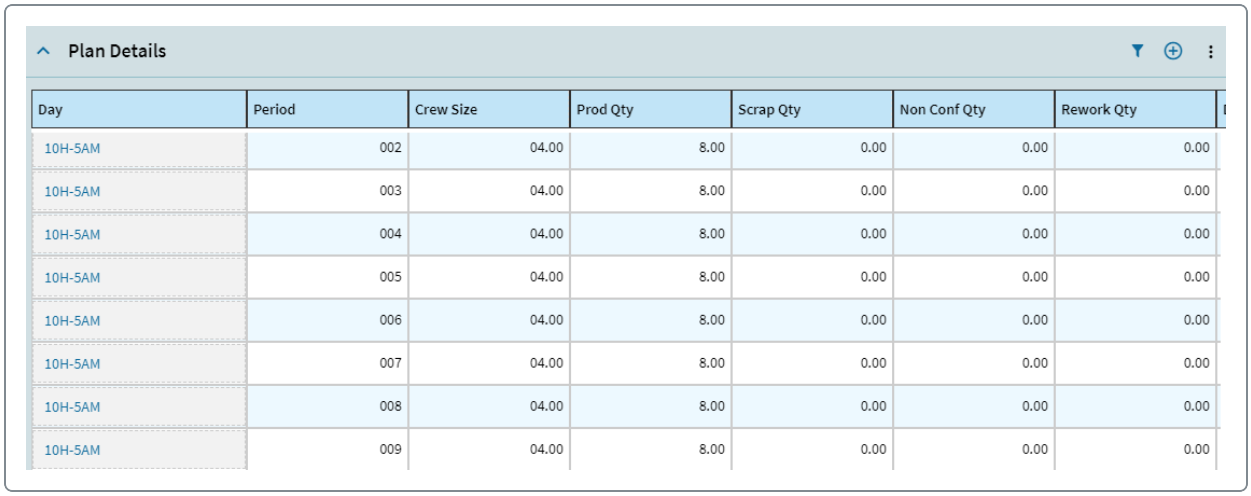


9. Select **Save**.

Entering Production Plan Details

Now complete the metric estimates for the production activity plan on the **Plan Detail** card. For each period in the day, complete the plan details.

1. Enter the estimated staffing for the period in the **Crew Size** field.
2. Specify the estimated number of pieces produced for this period in the **Production Quantity** field.
3. In the **Scrap Quantity** field, enter the estimated number of pieces scrapped for this period.
4. Specify the estimated number of pieces identified as non-conformance for this period in the **Non-Conformance Quantity** field.
5. In the **Rework Quantity** field, enter the estimated number of pieces identified as rework for this period.



Day	Period	Crew Size	Prod Qty	Scrap Qty	Non Conf Qty	Rework Qty
10H-5AM	002	04.00	8.00	0.00	0.00	0.00
10H-5AM	003	04.00	8.00	0.00	0.00	0.00
10H-5AM	004	04.00	8.00	0.00	0.00	0.00
10H-5AM	005	04.00	8.00	0.00	0.00	0.00
10H-5AM	006	04.00	8.00	0.00	0.00	0.00
10H-5AM	007	04.00	8.00	0.00	0.00	0.00
10H-5AM	008	04.00	8.00	0.00	0.00	0.00
10H-5AM	009	04.00	8.00	0.00	0.00	0.00

6. Select **Save**.

Creating a Production Activity Schedule

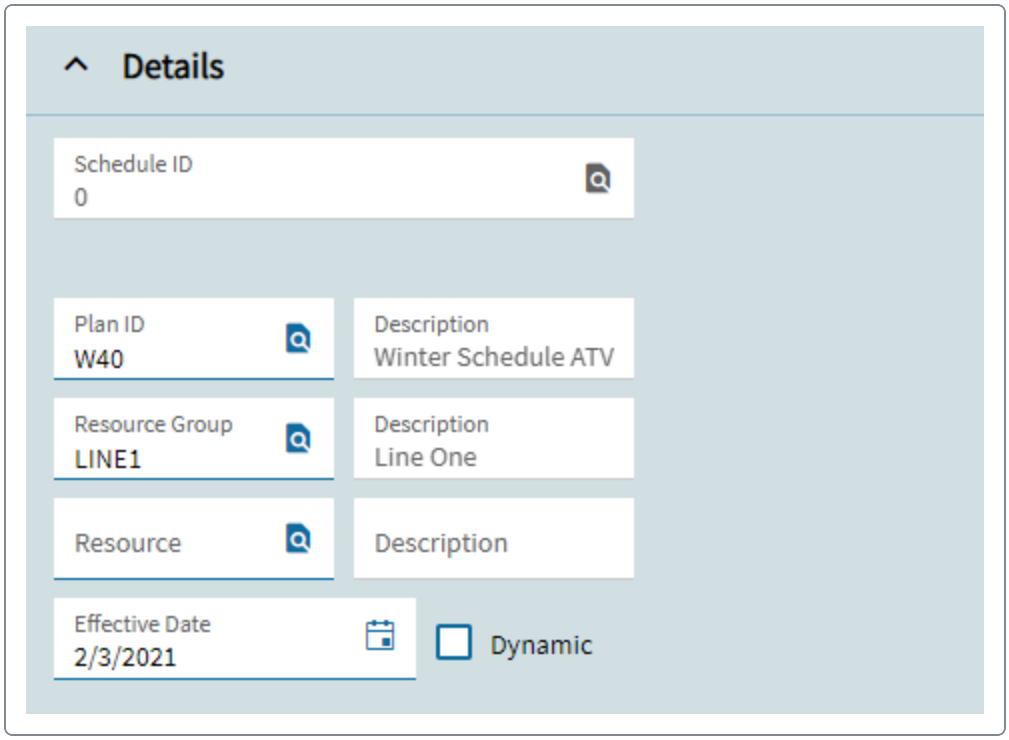
Create a production activity schedule in **Production Activity Schedule Maintenance**.

A production activity schedule is the manufacturing schedule used during a production activity plan. The planning happens at the resource or resource group level, so you can account for a schedule change that is required because of production planning alterations due to seasonal or product needs.

Each plan has an effective date. The system uses this value in the Production Activity Generator to generate activity records for resource groups with active production plans.

You can also use the same production plan on several resources or resource groups. Be sure to do this when you have several resources and/or resource groups that perform the same tasks during your manufacturing workflow.

1. From the main menu, go to **Production Management > Job Management > Setup > Production Activity Schedule**.
2. Select **New** to create a new record. The **Details** page displays.
3. Use the **Search** icon in the **Plan ID** field to find the plan ID you want to schedule. Once you select a plan, the details associated with it display.
4. The **Effective Date** for the plan defaults to today's date. Change this if you need to.



5. Select **Save** .

> The **Schedule ID** value is **0** by default and it does not change once you save the record. However, if you go back to the landing page and select **Refresh** from the Overflow menu , the grid refreshes and the new schedule gets assigned its schedule ID.

Running the Generate Production Activity Process

Run the **Generate Production Activity Process**to produce a production activity record for each resource group with an effective plan. This generation process populates the production plan for an entire company for a day, a week, or a preferred period.

The Generate Production Activity process does not delete any production activity records that exist in the defined time frame. If you need to completely reset the application to regenerate, you must delete all records manually.

The **Selection** parameters include:

- **Starting Date** - Select the starting date of the period for which you to generate production activity records. You can also set up this process to run following a regular schedule. To do this, select the **Dynamic** check box.
- **Ending Date** - Select the ending date of the period for which you to generate production activity records. You can also set up this process to run following a regular schedule. To do this, select the **Dynamic** check box.
- **Dynamic** - Select this check box to run the process by a dynamic option rather than by a specific date. After you select this check box, the date field displays a list of dynamic options instead of the calendar. If you select this check box, you should also select a schedule in the **Schedule** field that works with the option you chose in the date field, and then select the **Recurring** check box next to the **Schedule** field.
- **Current Site** - Select this check box to generate production activity records for the current site only.
- **Filter** - Use this field to select specific Resource Groups to include in the process.
- **Schedule** - Define when to run the process. If you select something other than **Now**, the **Recurring** check box is available.
- **Recurring** - Select this check box if you want the report to run on a repeating basis.

To run the process:

1. From the main menu, go to **Production Management > Job Management > General Operations > Generate Production Activity Process**.
2. Select the parameters you want to use for the process.
3. Select **Process**. 

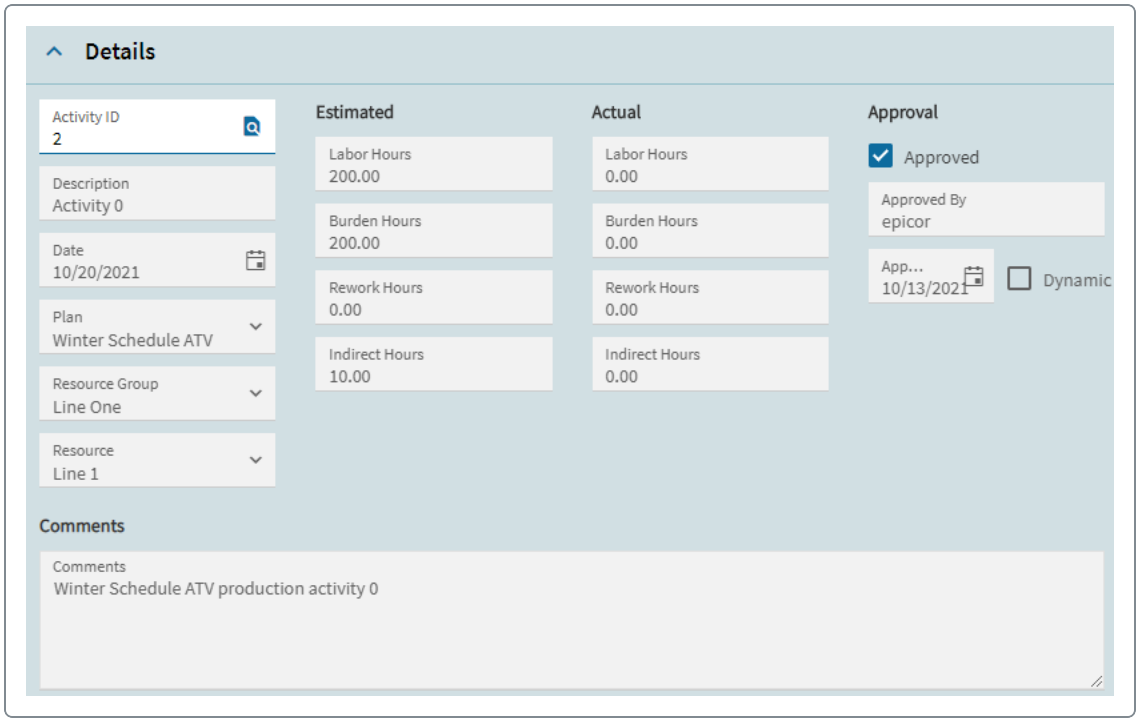
Working with Production Activity Maintenance

After you generate a production activity plan, you need to establish production activity metrics by period in **Production Activity Maintenance**. You define the metrics for each resource group, each resource, and each day. This minimizes how much data you enter for time, resources, and materials.

However, you can manually update these default Production Activity values to handle changes in your plans. For example, you may have less employees to work, or additional working hours needed outside the plan. Through **Time Entry**, users enter actual labor quantity and hours they worked on each job operation.

Adding a Production Activity

1. From the main menu, go to **Production Management > Job Management > General Operations > Production Activity Maintenance**.
2. Select **New** to add a new activity.
3. In the **Activity ID**, enter the activity order number. If you don't enter any value, the app will assign the next available number.
4. Select the production activity **Plan** to pull in production metrics.
5. Select the effective **Date** for this production activity.
6. Identify the **Resource** and **Resource Group** that will perform labor against the plan.
7. The production activity plan information defaults into the Hours group boxes:
    - When you first establish the activity, all hours are the **Estimated** values for the plan.
    - When employees enter time against the plan, the **Actual** values display.
8. Select the **Approved** check box.

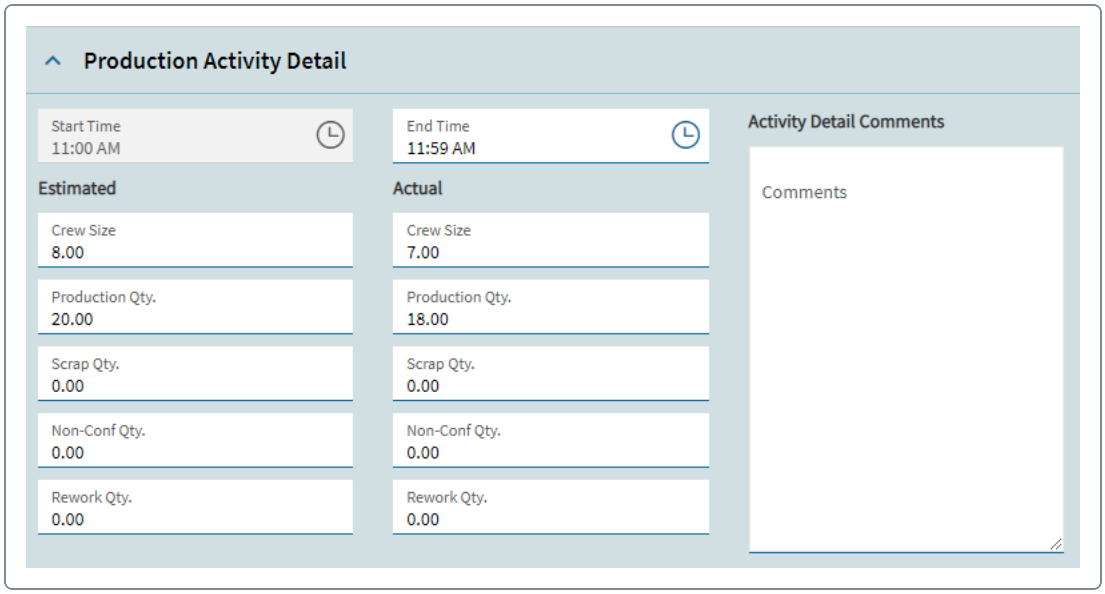


9. Select **Save**.

Entering Activity Details by Period

1. On the **Production Activity Detail Periods** card, review or update specific production activity information for each period.

   The **Estimated** values for each period come from the production activity plan. The **Actual** values display when employees report time against the plan.



2. Select **Save**.

Refreshing Values

From the Overflow menu , you can select one of the following refresh options:

Refresh - Deletes actual values displaying, and recalculates the information by pulling the latest metrics entered from the labor records.

Reset Period Data - Clears the actual values in **Production Activity Maintenance** and the corresponding production activity fields in the labor detail.

Reset and Reload Period Data - Clears actual values in **Production Activity Maintenance** and the corresponding production activity fields in the labor detail. Once the reset is complete, the application recalculates the values, and populates the new production activity values to both **Production Activity Maintenance** and labor detail.

Understanding Data Collection

Data Collection is an easy-to-use, online system for the plant floor that allows real-time visibility for plant transactions. Data Collection enables accurate labor reporting, as well as online transaction tracking, which provides management with a real-time picture of what is occurring on the plant floor by employee and job. Integration with Job Management, Scheduling, Quality Assurance, and Advanced Material Management eliminates dual entry and provides online, real-time views of the latest plant floor scheduling priorities. Through Application Studio, you can tailor the applications in a cloud friendly, upgrade resilient way that requires low/no code.

In addition, an integration with the Document Attach Tool allows plant floor access to needed documentation, such as product drawings, process documents, and multimedia videos.

The complete module functionality includes:

Feature	Benefit
Flexible Data Entry Technology	Use touchscreen, mouse, bar code, or keyboard interface to update labor information from the plant floor. Eliminate data entry mistakes and increase transaction speed by simply scanning a bar code tag to complete a transaction.
Work Queue	Provide employees with prioritized work schedules and make information directly available to the plant floor. Data Collection is optimized for use on the plant floor with the ability to select multiple operations for work at the same time, full sheet views, views specific to current, available, or expected work, ability to target work based on TAKT, pieces, hours, and setup group designations, and advanced search capabilities.
Multiple Languages	Display the Data Collection screens in the employee's primary language.
Distributed Hours	Automatically split labor hours across multiple jobs an employee works simultaneously on. Likewise, split resource or machine hours when two or more employees work on the same resource.
Quality Reporting	Capture rework and scrap reason codes, along with miscellaneous employee comments from the plant floor. Use the Quality Assurance options to report setup inspection, first article, piece counts, and more.
Shop Warnings	Shop warnings appear in various locations throughout the system when certain conditions exist or certain events occur. You use them to keep supervisors informed of a job's status or an employee's performance.

Feature	Benefit
Grace Periods/Multiple Shifts	Manage clock-in and clock-out periods with adjustments made for user-defined grace periods. Accommodate split and staggered shifts.
Trackers in the Plant	Users can access online trackers on the plant floor from within Data Collection. Job Tracker, Order Tracker, Customer Tracker, Shipment Tracker, and more are available based on login and secure access. Shop Tracker shows who's here, who's not here, current work center activity, as well as user-defined alert conditions from the plant floor.
Shipping and Receiving	In combination with the Advanced Material Management module, maximize responsiveness in the warehouse with Shipping and Receiving functions from within Data Collection.
Inventory Management	In combination with the Advanced Material Management module, maximize responsiveness in the warehouse with Inventory functions such as adjustment, material issues, and physical inventory counts from within Data Collection.
Material Handling	In combination with the Advanced Material Management module, maximize responsiveness of material handlers with material move queues and give operators the ability to request in-process WIP moves of product from one location to another, maximizing control of in process products while reducing delays. Additionally, move WIP products into inventory storage locations or stage WIP at the next resource based on available space and time. Quickly and accurately identify WIP and inventory containers with system generated bar codes.

To use the Data Collection functionality, your application must have the Data Collection license. Many major functions on this interface also require the Advanced Material Management (AMM) license; we recommend that you purchase this license before you run Data Collection.

Adding Employees to Data Collection

Shop employees are the individuals who produce quantities within your manufacturing center. Before they can access the Data Collection, they need an employee record. You can link an employee to a User ID, so you can define both the security access and the language that this employee uses. Several employees can be linked to one User ID, like Shop – English or Shop – Spanish. Employees that create inventory or shipping/receiving transactions, however, should have an individual ID for auditing purposes. This employee record also defines which functions are available for each user on the Data Collection interface.

Each employee is assigned a Labor Rate value; the application multiplies this value against the number of hours the employee worked on an operation. The resulting value is the actual labor cost placed against the operation. The sum of all labor costs on every operation equals the final actual labor cost on the job.

You can also define the job department for each shop employee. Job departments link shop employees and resource groups together for display on specific reports.

You enter shop employees through the Employee Maintenance program. If your company uses the Payroll module, however, you typically set up your shop employees in the Payroll Employee Maintenance program. In this program, you can then indicate that this individual is a shop employee, and a duplicate record is automatically generated in Employee Maintenance.

For security reasons, the Payroll and Job Management modules use separate employee files. Use this design feature to set up miscellaneous or contract employees for use in labor reporting without affecting any Payroll information.

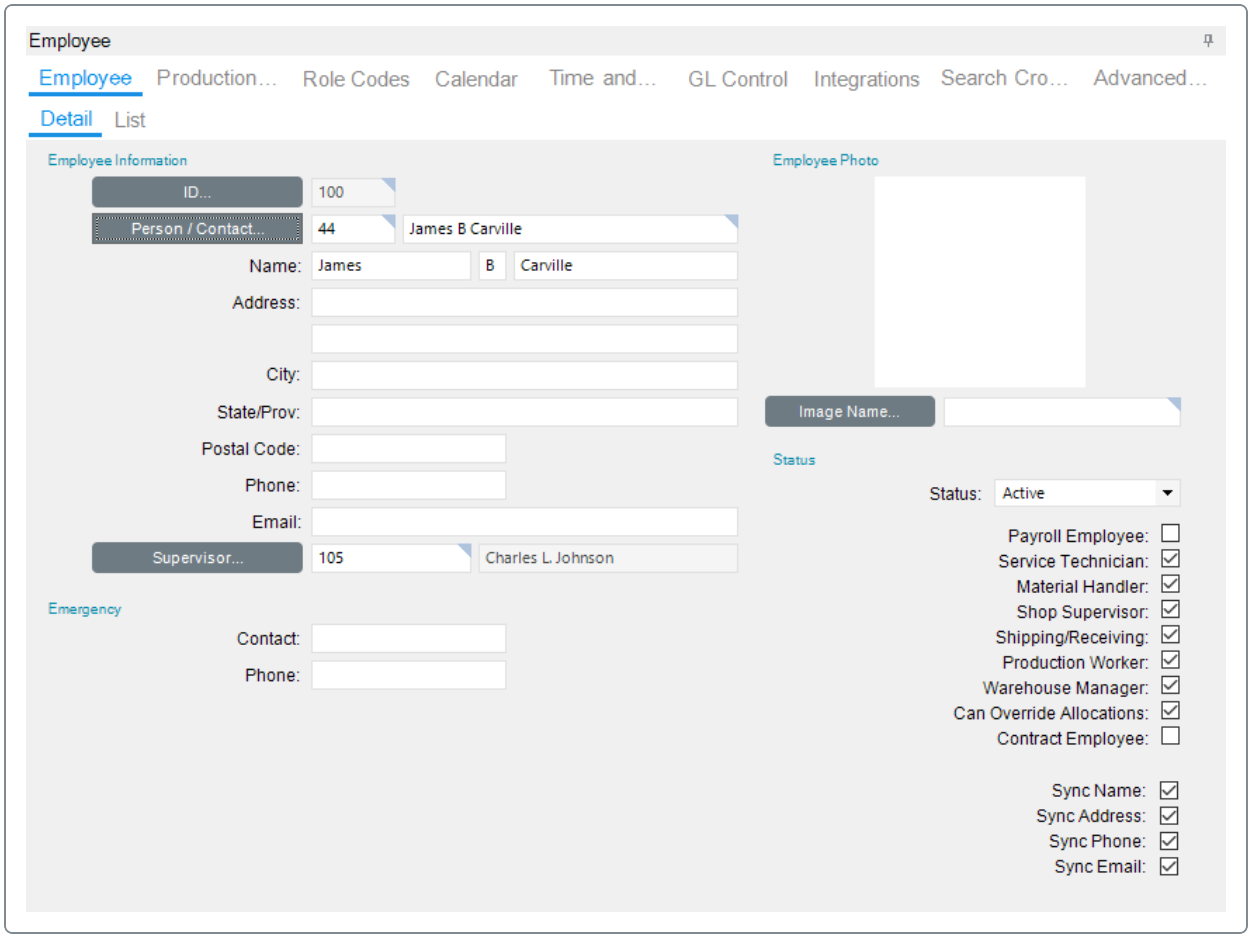
Creating New Employees

1. From the main menu, navigate to **Production Management > Job Management > Setup > Employee**.
2. Select **New**to add a new employee.
3. In the **Employee ID**, enter an identifier for the employee. This value uniquely identifies the record on various reports.
4. Optionally, select the **Person / Contact** identifier for this employee record if one exists. If one does not exist, the application uses the values in the employee information fields to automatically create a person/contact record.
5. Enter employee information such as **Name**, **Address**, **Phone**, and **Email**.
6. In the **Status** field, verify the employee is an **Active** employee.

7. You next define what areas of Data Collection this employee can access. If this employee works with material quantities, select the **Material Handle** check box. If this employee supervises the shop floor, select the **Shop Supervisor** check box. If this employee ships out parts and receives materials, select the **Shipping/Receiving** check box.

> If you have an individual who needs to be defined on multiple records, like a shop employee who is also a buyer, you can define this person in **Person/Contact Maintenance** first and then link this person record to other records throughout the application.

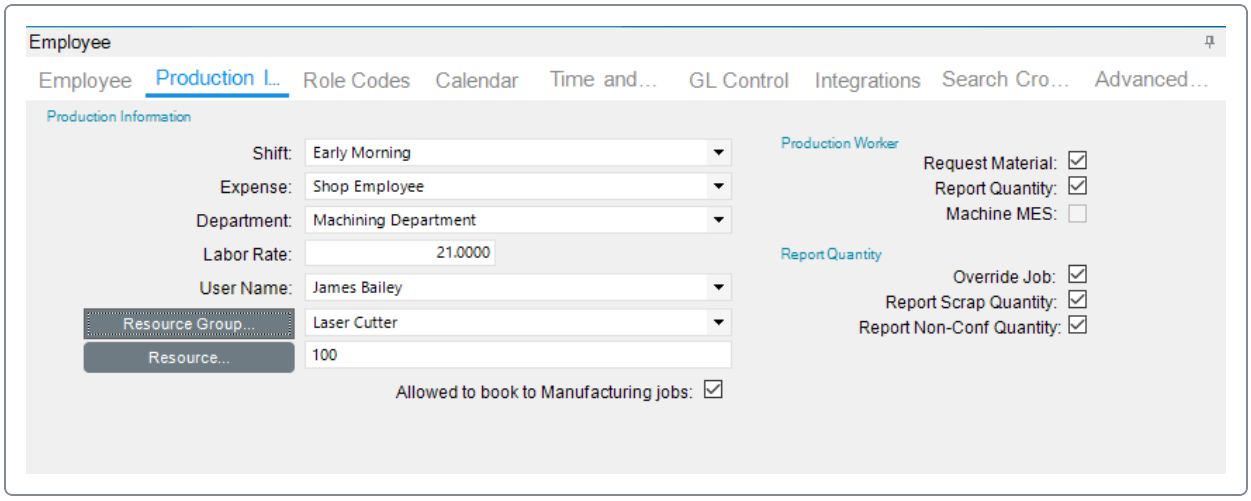
8. If you want name, address, phone, and email changes made to this employee record to automatically update the linked person record in **Person/Contact Maintenance**, select the **Sync Name**, **Sync Address**, **Sync Phone**, and/or **Sync Email** check boxes.



9. Select **Save**.

Adding Production Information

1. Expand the **Production** card.
2. Select the **Shift** during which this employee normally works. You create shift records in **Shift Maintenance**. For more information, review the Shift Maintenance topics within application help.
3. From the **Department** drop-down list, select the job department.
4. Optionally, select the **User Name** of this employee. Only the identifiers for current users within the company display on this drop-down list. Use this identifier to link the employee to specific security and language settings. The feature can define a many to one relationship that includes several employees.
5. Optionally you can select a **Resource Group** for this employee. If a resource group is defined it will be used as the default in **Time Entry**, **Expense Entry** and the **Work Queue**. For example when an employee opens the Work Queue they will immediately see the jobs available for the given resource group.



6. When the employee record is complete, select **Save**

Handheld / Menu Security Access

In **Handheld/ Menu Security Maintenance**, you configure security settings for and Handheld menus within your Kinetic application. You can select apps and make them available to employee roles within your company. You can also select to hide menus and menu items for all employees in your company, or reset all Handheld/Data Collection menu security settings to defaults.

To access this app, an employee must have Security Manager rights.

You can select employee roles and package control permissions for employees in **Employee Maintenance**. In **Handheld /Menu Security Maintenance**, you define which employee roles have access to menu items, and which employee roles and package control permissions have access to handheld package control menu items.

For example, you select an employee role and/or package control for a menu item. Then all employees that have the employee role and/or package control check box selected in **Employee Maintenance** have access to this menu item.

To determine which employees have access to a package control menu item, or a non package control Handheld menu item, the following rules apply:

- If there are employee roles selected for a menu item, employees must have at least one of the selected employee roles to access the menu item.
- If there are no employee roles selected for a menu item, no employees have access to it.

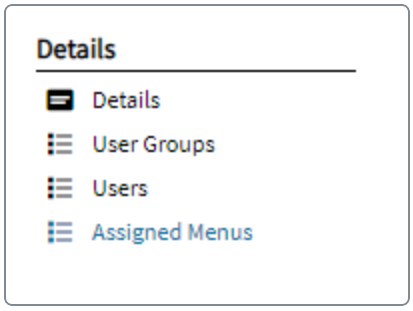
To determine which employees have access to a handheld package control menu item, the following rules apply:

- If there are both employee roles AND package control roles selected for a menu item, employees must have at least one of the selected employee roles AND at least one of the selected package control roles to access the menu item.
- If there are no employee roles selected for a menu item, Kinetic ignores employee roles when determining access to that menu item. Employees that have at least one of the selected package control roles have access to the menu item.
- If there are no package control roles selected for a menu item, Kinetic ignores package control roles when determining access to that menu item.
- If there are no employee roles AND no package control roles selected for a menu item, no employees have access to the menu item.

Assigning Data Collection Security Privileges

1. From the main menu, go to **System Setup > Security Maintenance > Menu Security Maintenance**.

2. In the Nav Tree, expand the Handheld or menu to set security options.



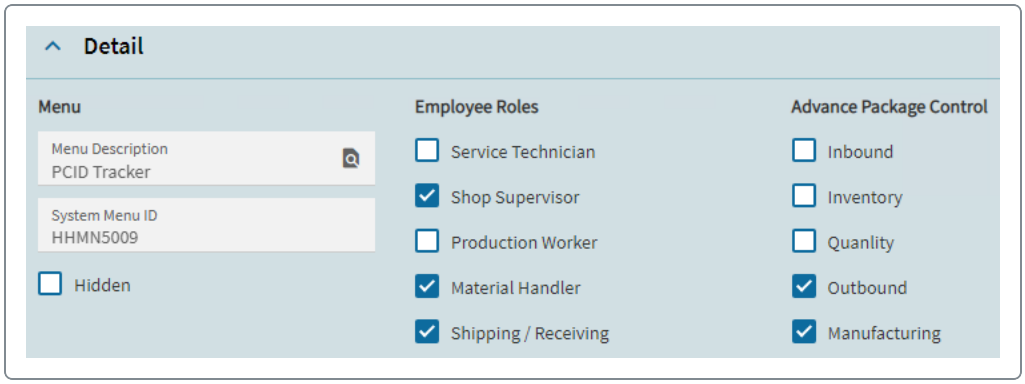
3. Select the menu item for which you want to set security access options.

> You cannot set security access for the whole menu. You can only select to hide the menu.

4. In the **Employee Roles** group box, select the employee roles that should have access to the selected menu item.

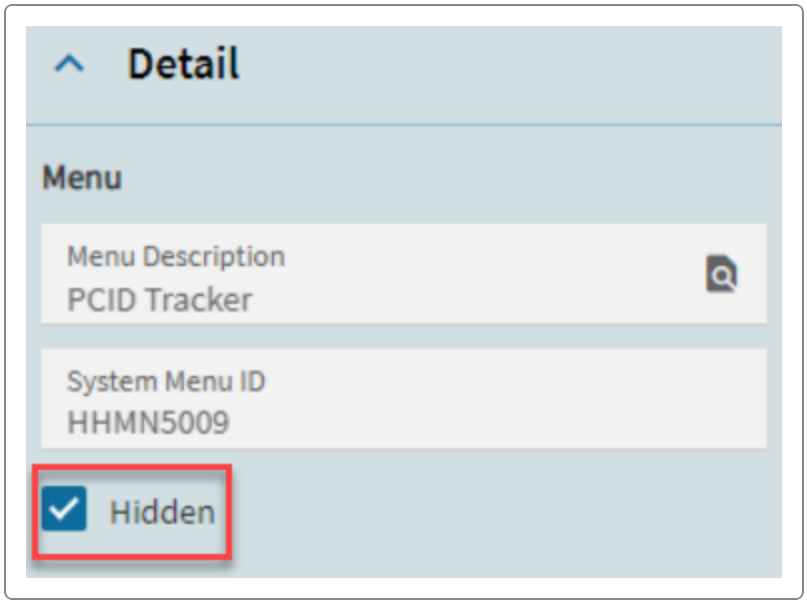
5. In the **Advanced Package Control** group box, select the package control security roles that need access to the selected menu item.

> The **Advanced Package Control** group box is only available for handheld Package Control apps. They are not available for Data Collection package control apps, or non package control Handheld apps.



6. Select **Save**.

7. If you want to hide the menu or menu item from users, select the **Hidden** check box.



8. If you need to reset access privileges to defaults, select the **Reset** icon .

Adding Epicor Mobile Warehouse to the Nav Tree

You can also add the Epicor Mobile Warehouse node to the app's Navigation Tree.

Epicor Mobile Warehouse is the new generation handheld application that offers a modern and intuitive user interface for warehouse and distribution functions. It provides workflow optimization for fast and accurate scanning, which reduces time to process transactions, increases accuracy, and reduces errors. You can download Epicor Mobile Warehouse from the Google Store to run on the latest Android devices. It's fully integrated to Kinetic.

To add Epicor Mobile Warehouse to the app, you must access the Epicor Services and locate the Data Collection Menu Service. Next, from the methods, select the **Import MES Menu Data** (ImportMESMenuData) method, and define the parameters before you run it. You can run it using different API platforms such as Swagger or Postman. Both are publicly available.

METHOD: ImportMESMenuData

```
Import MESMenu data received in a MESMenuTableset, and add it into
MESMenu and MESMenuSecurity tables mesMenuTS: Dataset with MESMenu and
MESMenuSecurity records to be added into the DB.

mesMenuTS: Dataset with MESMenu and MESMenuSecurity records to be added into the DB.

fullMenuList: Indicates the type of process to run: if True, then a full dataset process.
This includes deleting exsiting seed data. If False, then an incremental partial dataset pro-
cess.
```

```
There is no elements deletion in this case.

recreateFromSeedData: Indicates if a recreation of the Menus based on the current seed data
is
required before the data processing. If True, then dataset is optional.
```

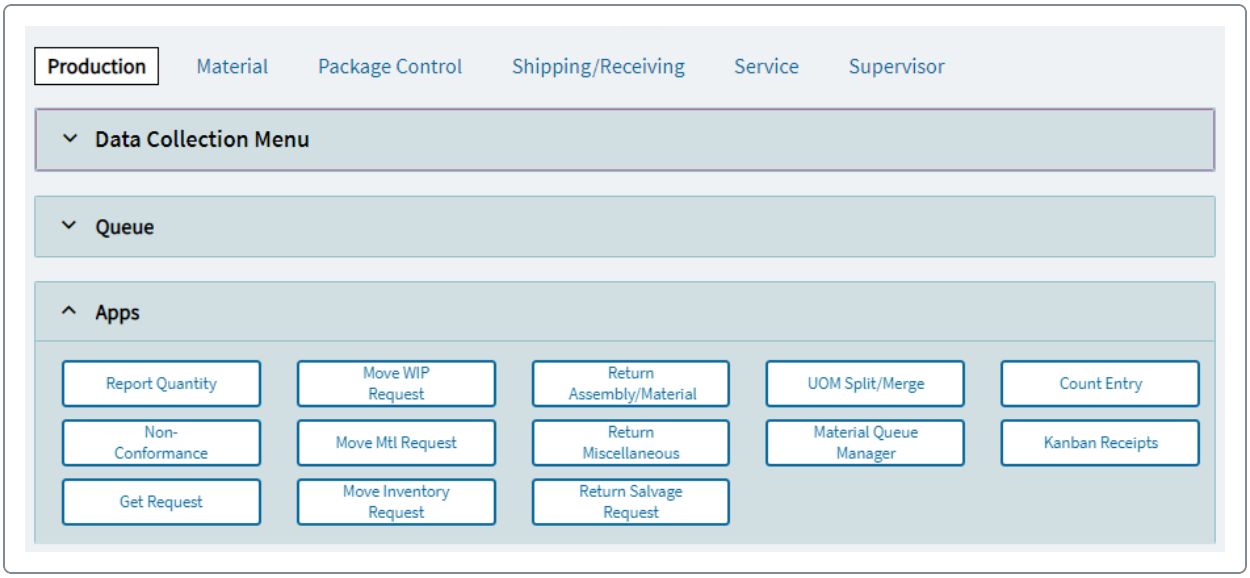
Role-Based Layouts in Data Collection

Data Collection provides a way for administrators to set unique layouts for users depending on their role: Service Technician, Material Handler, Shop Supervisor, Shipping/Receiving, or Production Worker. With role-based layouts, supervisors can see different Kinetic apps than their direct reports, while production workers can only see job-related content.

A shop employee has access to certain apps depending on their role defined in the **Employee Maintenance** app. Expand the sections below to learn about each of the apps set.

Production Apps

Use the **Production** page to control all aspects of production on the current job(s).



The employee must have the **Production Worker** permission enabled in the **Employee > Detail** card in **Employee Maintenance**.

You can launch the following apps from the **Production** page:

App	Description
Report Quantity	Report a production quantity is complete against a specific operation and then request that the pallet/skid be moved to the next operation. You can report the quantity without ending the current labour transaction. If you have the **Override Job Number** check box selected on your user record in **Employee Maintenance**, you can do this without having to clock out of the operation. However, if you do not have these rights, you can still do this without having to end the activity.
Non-Conformance	Add or update non-conformant materials that occur during production. Non-conformant materials are items that are defective or require inspection in some way.
Get Request	Request materials for use during an operation. Use this window to put in requests so the materials you need arrive on time.
Move WIP Request	Move a Work in Process (WIP) request from one physical location to another physical location.
Move Mtl Request	Enter a movement request for materials. Use it to move material requests from one physical location to another physical location.
Move Inventory Request	Enter a movement request for inventory. You can move a part quantity request to another job or warehouse.
Return Assembly/Material Request	Return an assembly or a material request from a WIP job to stock.
Return Miscellaneous Request	Return a part quantity request from one warehouse to another warehouse.
Return Salvage Request	Send a salvaged part request from a job to stock.
UOM Split/Merge	Split an inventory quantity expressed in a specific unit of measure into one or more alternate unit of measure quantities, or to merge inventory quantities expressed in several alternate units of measure into a single unit of measure quantity. It can only be used for parts for which the Track Multiple UOMs check box is selected in Part Maintenance.

Material Apps

Use the **Material** page to handle the materials you need. You can process requests, issue materials to jobs, adjust inventory, perform physical counts, and so on.

The employee must have the **Material Handler** permission enabled in the **Employee > Detail** card in **Employee Maintenance**.

App	Description
Mfg Receipts	Receive manufactured parts into inventory.
Serial Tracker	Display information about serial-tracked part records.
UOM Split/Merge	Split an inventory quantity expressed in a specific unit of measure into one or more alternate unit of measure quantities, or merge inventory quantities expressed in several alternate units of measure into a single unit of measure quantity. It can only be used for parts for which the Track Multiple UOMs check box is selected in Part Maintenance.
Issue Material	Issue material from inventory to a job.
Issue Assembly	I issue an assembly from inventory to a specific job.
Issue Misc	Enter a miscellaneous issue of parts from inventory.
Mass Issue	Issue all planned materials to a job, instead of issuing them one by one.
Return Mater-ial	Record part quantities that have been returned.
Return Assembly	Record assemblies that have been returned.
Return Misc	Record miscellaneous issues that have been returned.
Trans Log	Review transaction activity for parts and quantities.

App	Description
Move WIP	Move a Work In Process (WIP) part from one job operation to another. It updates the PartWIP table, and if the job contains a serial tracked part, the application updates the serial number and serial tracing tables to reflect the newly assigned operation.
Move Material	Move a raw material issued to a job to another location.
Adjust WIP	Adjust the physical location or quantity of a Work In Process (WIP) part. You only run this program when a WIP part is recorded in the application in one physical location, but is actually in another physical location.
Adjust Material	Use this program to adjust the physical location or quantity of a material. You can only run this program when a material is recorded in the application in one physical location, but is actually in another physical location.
Non-Conformance	Add or update non-conforming materials that occur during job production. Non-conforming materials are items that are defective or require inspection in some way.
Move Inventory	Transfer inventory quantities within the same site. These transactions track the movement of parts from one warehouse/bin to another warehouse/bin.
Adjust Inventory	Adjust each part's quantity on hand values within your inventory.
Count Entry	Enter physical inventory tag counts.
Unpick Sales Order	Unpick materials for a specified order, line, release and part number, and then return them to a specified warehouse and bin.
Process by ID	Process a specified Queue ID in the Material Request Queue.

Package Control Apps

The following programs are available on the **Package Control** page:

The apps on this card are only available if the **Advanced Material Management (AMM)** module is licensed and installed on your system.

App	Description
Job Receipt to Inventory by PCID	Transfer items from a WIP status into inventory by PCID.
Package Control ID Tracker	Track the movements of a Package Control ID.

App	Description
Partial PCID	Generate a PCID for a container that is only partially complete.

The employee must have the **Material Handler** permission enabled in the **Employee > Detail** card in Employee Maintenance.

Shipping/Receiving Apps

The **Shipping/Receiving** page gives you control over all areas of the shipping and receiving process. Use these controls to record the materials you have received and the parts you have shipped out.

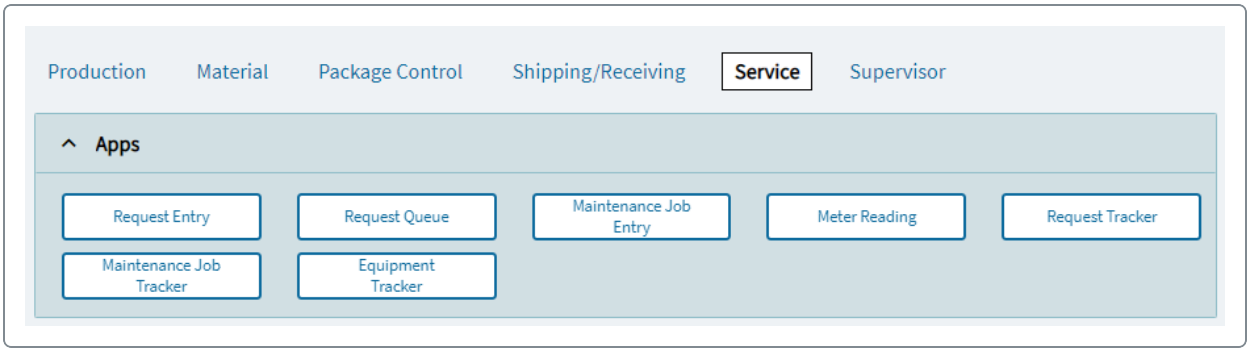
The programs on this card are only available if the Advanced Material Management (AMM) module is licensed and installed on your system. Shop employees can also only access these programs if they have the **Shipping/Receiving** check box selected within Shop Employee Maintenance.

App	Description
Receipt Entry	Enter receipts from all inventory materials, non-inventory materials, and subcontract parts.
Salvage Material Receipt	Report receipts of salvaged materials from a job. Salvaged materials are entered as inventory receipt transactions. They also reduce the material cost against specific jobs.
Job Receipt	Enter the receipt of manufactured parts to another job.
Transfer Order Shipment	Record an inter-site transfer shipment. This program satisfies inter-site demand.
Transfer Order Receipt	Enter a receipt for a transfer order.
Transfer Order Tracker	Review current information about a transfer shipment.
Customer Shipment	Process customer shipments. You can either relieve inventory or ship directly from a job.

App	Description
Bill of Lading	Enter and update bills of lading. These items are shipping documents that carriers use to identify cargo. Create these from existing packing slips, or create them manually.
CustShpmnt Tracker	Review current information about a customer shipment – including the parts and quantities that were shipped.
Misc Shipment	Enter packing slips for non-billable material. You can also use this program to enter and print packing slips to return discrepant parts to a supplier.
MiscShpmnt Tracker	Review current information about a miscellaneous shipment – including what items were shipped.
RMA Processing	Control and track customer returns. Enter information about the return and then communicate this information to the different groups that may need to take action – such as inspection, billing, and order processing.
Subcontract Shipment	Process shipments to subcontract suppliers for parts with operations processed outside your company.
Serial Tracker	Display information about serial-tracked part records. You can review each part's serial tracker status, location, and part transactions.
RMA Disposition	Dispose and complete RMA receipts from inspection.
Stage Ship Confirm	Confirm shipments of stage pack IDs or master packs. You can filter these staged pack IDs by stage number, shipping status, shipment type, and ship via method.
Master Pack Shipment	Combine separate pack IDs into one master pack group to ship as one shipment. This pack is restricted to only shipments of the same type.

Service Apps

Use the **Service** apps to track preventative maintenance tasks performed on equipment used or installed in a manufacturing or distribution facility. This can include internal capital equipment, tools, gauges and fixtures such as air conditioning units, forklifts, shelving, and shop floor tools.



The apps are accessible for a shop employee who has the **Service Technician** check box selected in Shop Employee Maintenance.

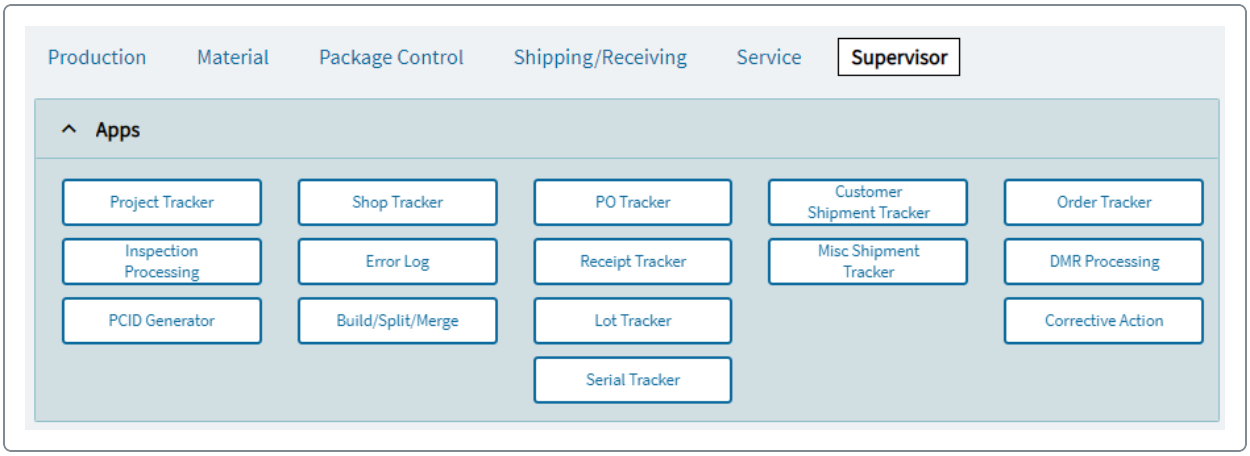
App	Description
Request Entry	Request the maintenance be performed on a piece of capital equipment.
Request Queue	Disposition maintenance job requests previously entered into Maintenance Request Entry.
Maintenance Job Entry	Use this app for direct entry of maintenance jobs used to initiate and track the progress of preventative maintenance performed on a piece of equipment.
Meter Reading	Record the meter data for a specific piece of equipment. You can enter meter data for a piece of equipment regardless of whether it is attached to a preventative maintenance plan with configured meter data. You can view meter reading information as needed in the Equipment Tracker.
Request Tracker	Review maintenance job request information entered into Maintenance Request Entry.
Maintenance Job Tracker	Track maintenance jobs used to initiate and track the progress of preventative maintenance performed on a piece of equipment.
Equipment Tracker	Review master records for equipment installed and used in a manufacturing or distribution facility.

Supervisor Apps

Review job progress within your manufacturing center.

The apps are accessible for a shop employee who has the **Shop Supervisor** check box checked in Shop Employee Maintenance. However, AMM licenses are not necessary

for this tab to work.



App	Description
Project Tracker	Review current projects.
Inspection Processing	Inspect the non-conformance entries made for defective assemblies and materials. You can also use this tool to inspect purchase order receipts and customer returns.
PCID Generator	Generate PCIDs and print PCID barcode labels. When you generate a group of PCIDs and print labels, you can later use them in other areas to load inventory. When you generate PCIDs, you can determine the number of PCIDs, the package control type, the package control ID code, package code and part. You can also enter the number of PCID labels to print, and the printer from which you want to print a label.
Shop Tracker	Review current shop activity. You can see information on resources, labor activity, and shop warnings.
Error Log	An alert error occurs when the application cannot send a global alert (an automatic email notification) to a specific recipient. When such an error occurs, an entry displays in this log.
Build/Split/Merge	Build, split or merge PCIDs. You can build PCIDs that contain parts, or parent PCIDs that contain child PCIDs, merge two or more PCIDs into a single PCID, nest PCIDs into another PCID or split parts from a PCID and add them to another PCID. You can also return parts in a PCID to inventory.

App	Description
PO Tracker	Review the current information about a purchase order. This includes information like purchase order status, supplier name and address, and order lines.
Receipt Tracker	Review current information about a purchase order receipt. This includes information like the purchase order number, the received lines, and the landed costs.
Lot Tracker	Display information about lot-tracked part records. Use this tool to review lot numbers, on-hand quantities, and lot transactions.
Serial Tracker	Display information about serial-tracked part records. You can review each part's serial tracker status, location, and part transactions.
Customer Shipment Tracker	Review current information about a customer shipment – including the parts and quantities that were shipped.
Misc Shipment Tracker	Review current information about a miscellaneous shipment – including what specific items were shipped.
Order Tracker	Review current information about a sales order. You can review each sales order's lines and commissions.
DMR Processing	Process job material, job assemblies, inventory, customer returns, or purchase order receipts that fail inspection.
Corrective Action	Specify what actions to take on non-conforming items. These items are specified in non-conformance entries in Nonconformance.

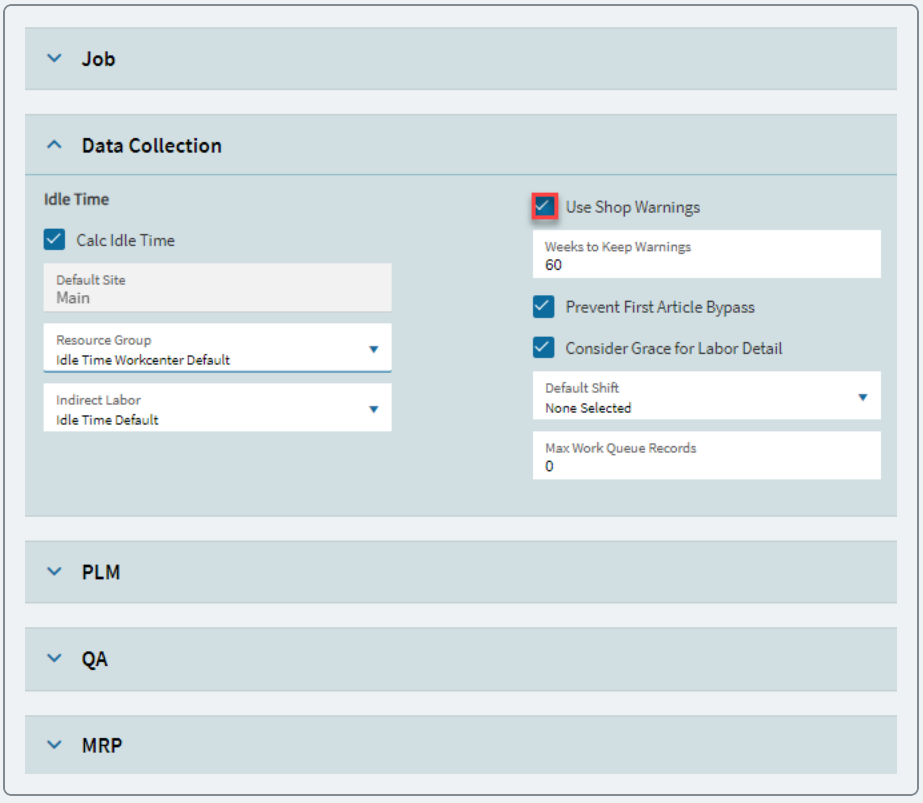
Enabling Shop Warnings

Shop warnings displays in various locations throughout Kinetic. You get the warnings when certain conditions exist or certain events occur. They help keep supervisors informed of a job status or the performance of an employee.

For example, Fred O'Meara, David Lewis, and Jean Duvall are all department managers. You want to notify them automatically when events occur on jobs run in their departments. You create an alert group for department managers and assign appropriate shop warnings and global alerts to the group. When an event occurs on this job that triggers a shop warning or a global alert, the application automatically sends an email out to everybody on the job's People list that are assigned to alert groups that use the global alert or shop warning.

You cannot add or delete your own shop warning messages. Instead, you can use the predefined warnings that inform you of a variety of critical events.

The warnings only display if activate this feature in the 'Company Configuration' app.



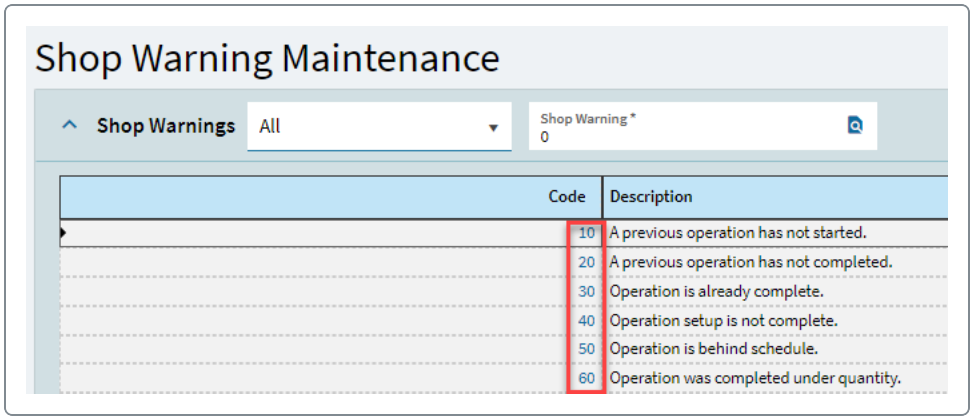
To enable a shop warning:

1. Open **Shop Warning** app.

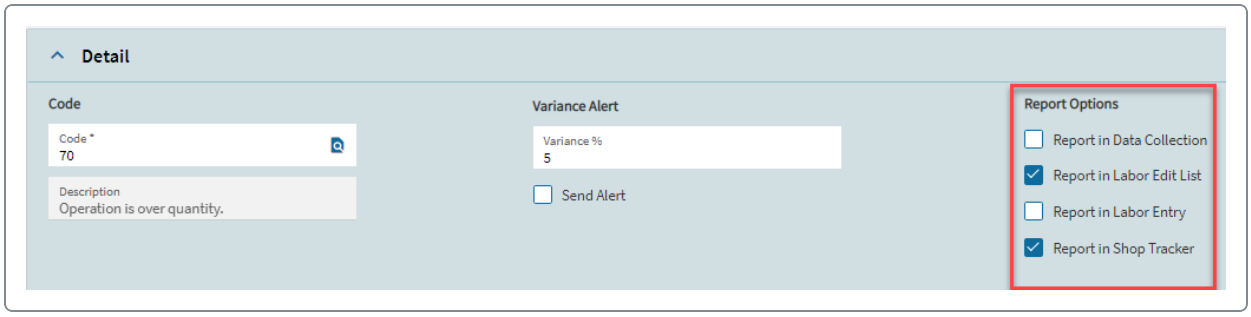
   The Landing page displays. The page displays all the existing shop warning records.

2. To a shop warning, select a code link inside the grid.

   The Detail card displays.



3. Next, update the report options by selecting the check boxes, if this warning should be reported in 'Data Collection', 'Labor Edit List', 'Labor Entry' or 'Shop Tracker'.



4. Use the **Variance Alert** group box to set the percentage that triggers the warning.

   For example, you enter '5' as the variance percentage for the 'Operation Over Quantity' warning message. One hundred (100) is the planned operation quantity for operation '10' on a certain job. An employee enters labor toward this operation, and enters a completed quantity of '103' pieces. The operation is over quantity, but the discrepancy is less than '5' percent of the planned quantity. The warning will not be reported. Another employee enters a completed quantity of '107' pieces. The operation is over quantity and the discrepancy is greater than '5' percent of planned. As a result, Kinetic triggers the warning.

5. Select the **Send Alert** check box to send an e-mail to appropriate personnel when the condition that causes the warning occurs.

   This option is only available for warnings that might be related to specific jobs.

6. Select **Save**.

Clocking In for the Day

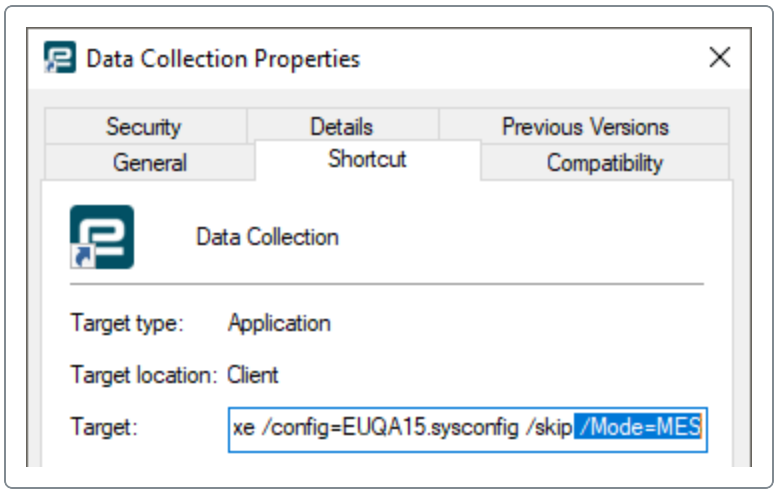
At the beginning of each day, an employee must clock in to report indirect or direct time.

Launch Data Collection. It is usually an icon on your desktop.

Adding the Data Collection Icon to your Desktop

1. On your desktop, make a copy of your Kinetic icon and rename it to Data Collection (or something similar).
2. Right-click this icon and select **Properties**. The **Data Collection Properties** window displays.
3. Add **/Mode=MES** to the argument in the **Target** field.

   Make sure you add space before **/Mode=MES**.



For example:

C:\Epicor\ERP10\EUQA15\Client\Epicor.exe /config=EUQA15.sysconfig /skip **/Mode=MES**

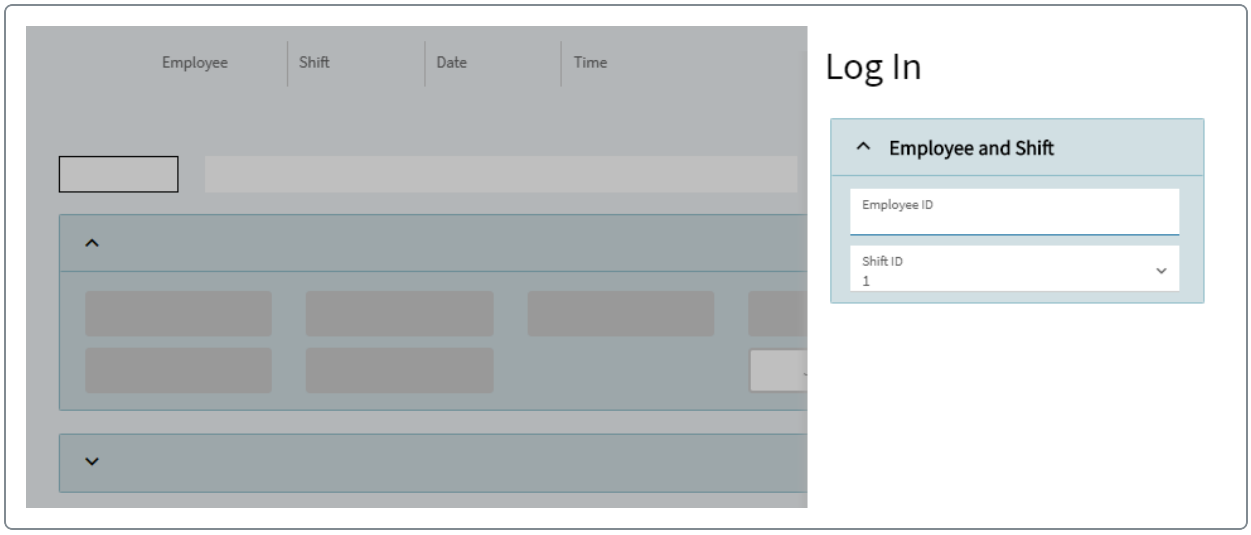
Launching Data Collection in a Browser

You can also launch the web version of Data Collection.

In the browser, enter your Data Collection URL: <AppServer>/apps/erp/home/#/home?mode=mes.

For example: https://euvmguest.playground.local/ERPCurrent/apps/erp/home/#/home?mode=mes

On the Data Collection home page, select Log In. Enter the Employee ID and press **Tab** to accept the default shift.



Your picture, name, current shift, clock-in date, and time details display in the upper left corner of the home page.

Clocking Out for the Day

You may clock out of the app whenever management wants you be off the clock while away from work. For example, if the you are leaving the building for any reason, or at the end of a shift.

Selecting the 

button will close the current labor transaction as well as log you out of the Data Collection terminal.

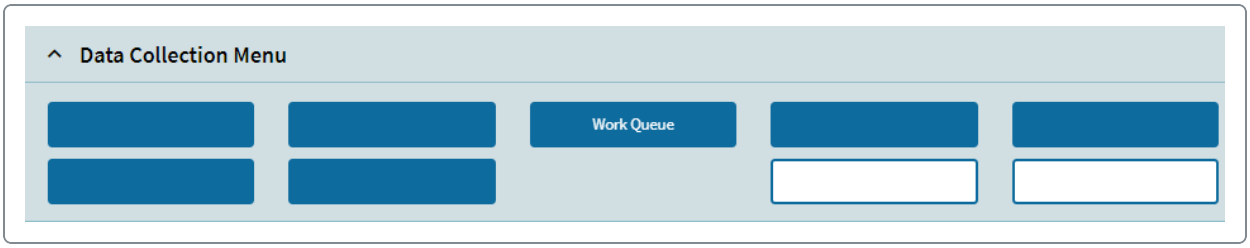
Reviewing the Work Queue in Data Collection

The work queue contains a listing of all operations a specific selected resource group. This queue informs you what operations you need to perform and in what order according to the schedule.

The work queue let's you to:

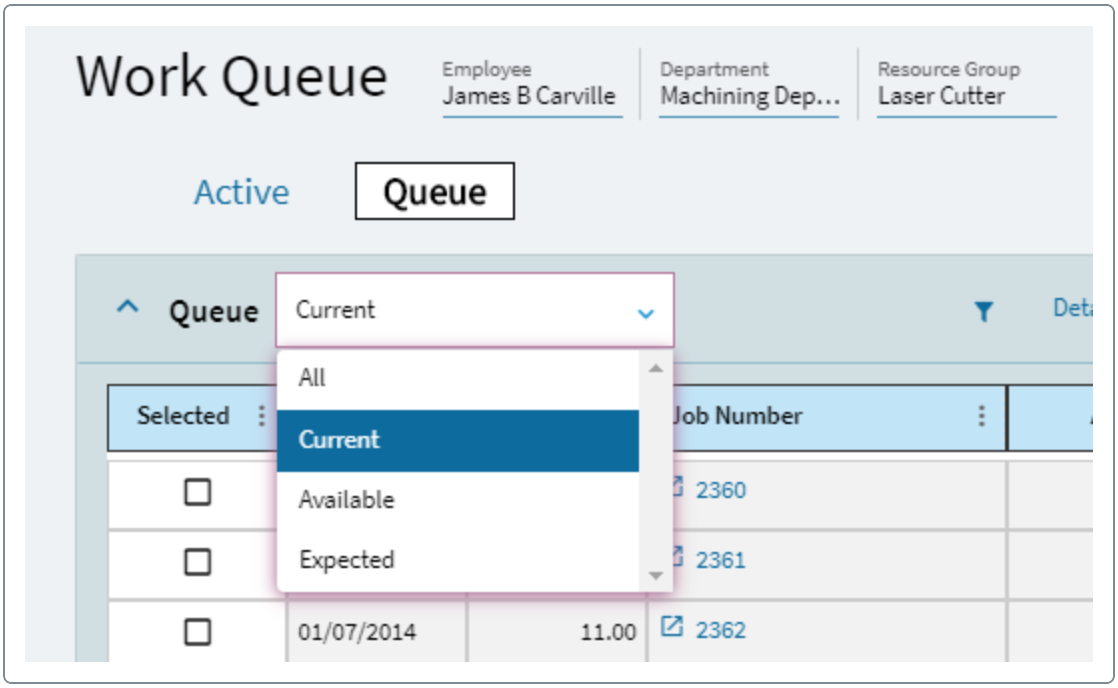
- Quickly identify active work and clock into multiple jobs.
- Start production activity for multiple job operations.
- Select multiple job operations and end activity on them simultaneously.

To view all open jobs for your resource group, select the **Work Queue** button.



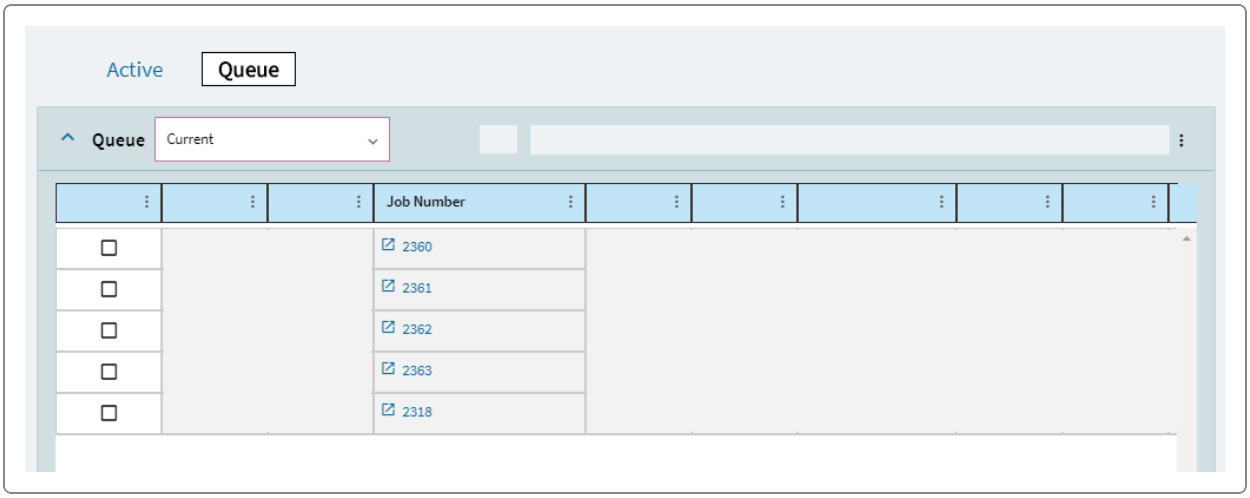
If you are a member of a Resource Group, the current, available, and expected work reflect all the work scheduled to that Resource Group. If working outside of your normally assigned Resource Group, select the **Search** option from the Overflow menu and pull in the Jobs assigned to that Group. When searching, you can filter by **Department** to narrow down the search results.

When you are in your work queue, you can choose the job operations you want to focus on:

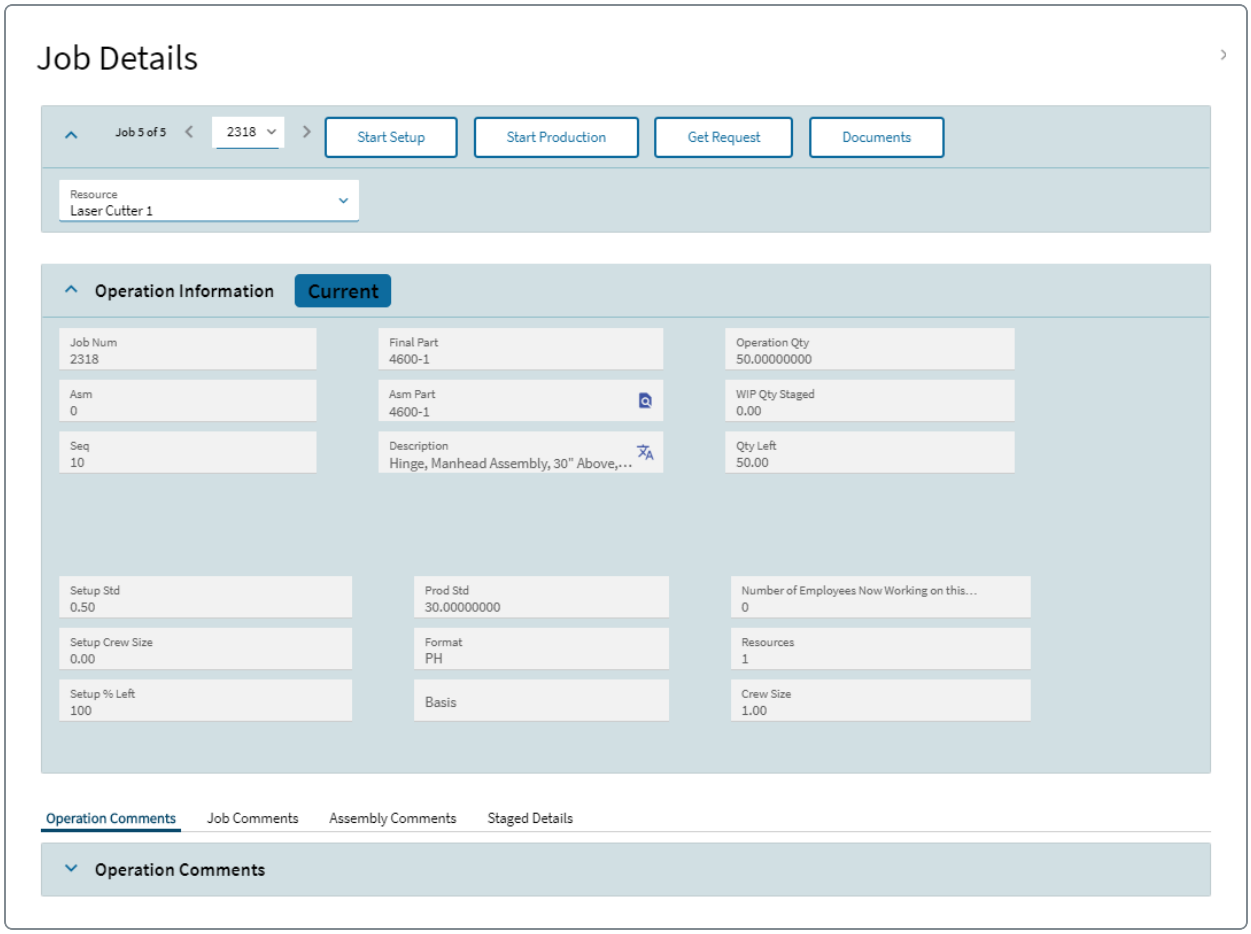


- **Active** - In-process job operations in the specified resource group which you are logged into.
- **Current** - Job operations in the specified resource group whose previous operation has been completed.
- **Available** - Job operations in the specified resource group whose previous operation has not been completed but the quantity is reported.
- **Expected** - All other future job operations.

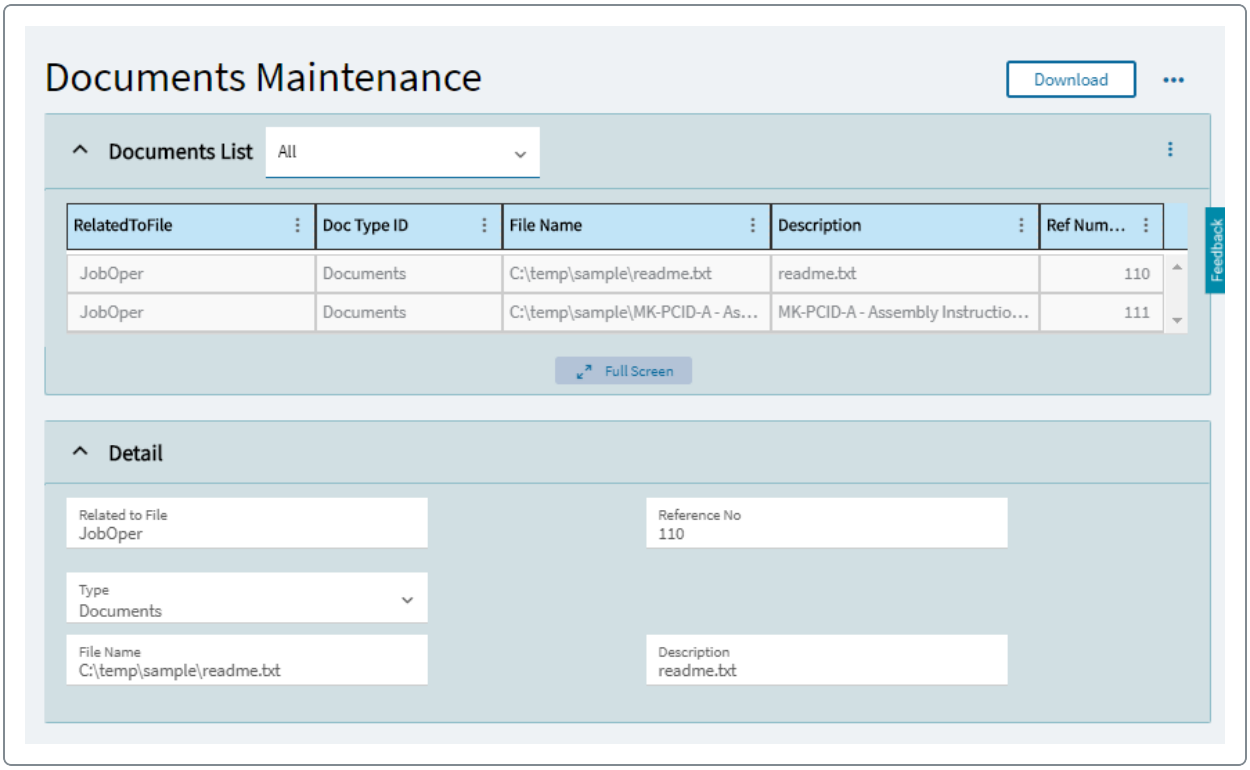
Notice that all the job numbers in your work queue are links so you can tap on them to view more details about the jobs.



This brings up the **Job Details** page. View job details for the selected job operation and enter required comments.

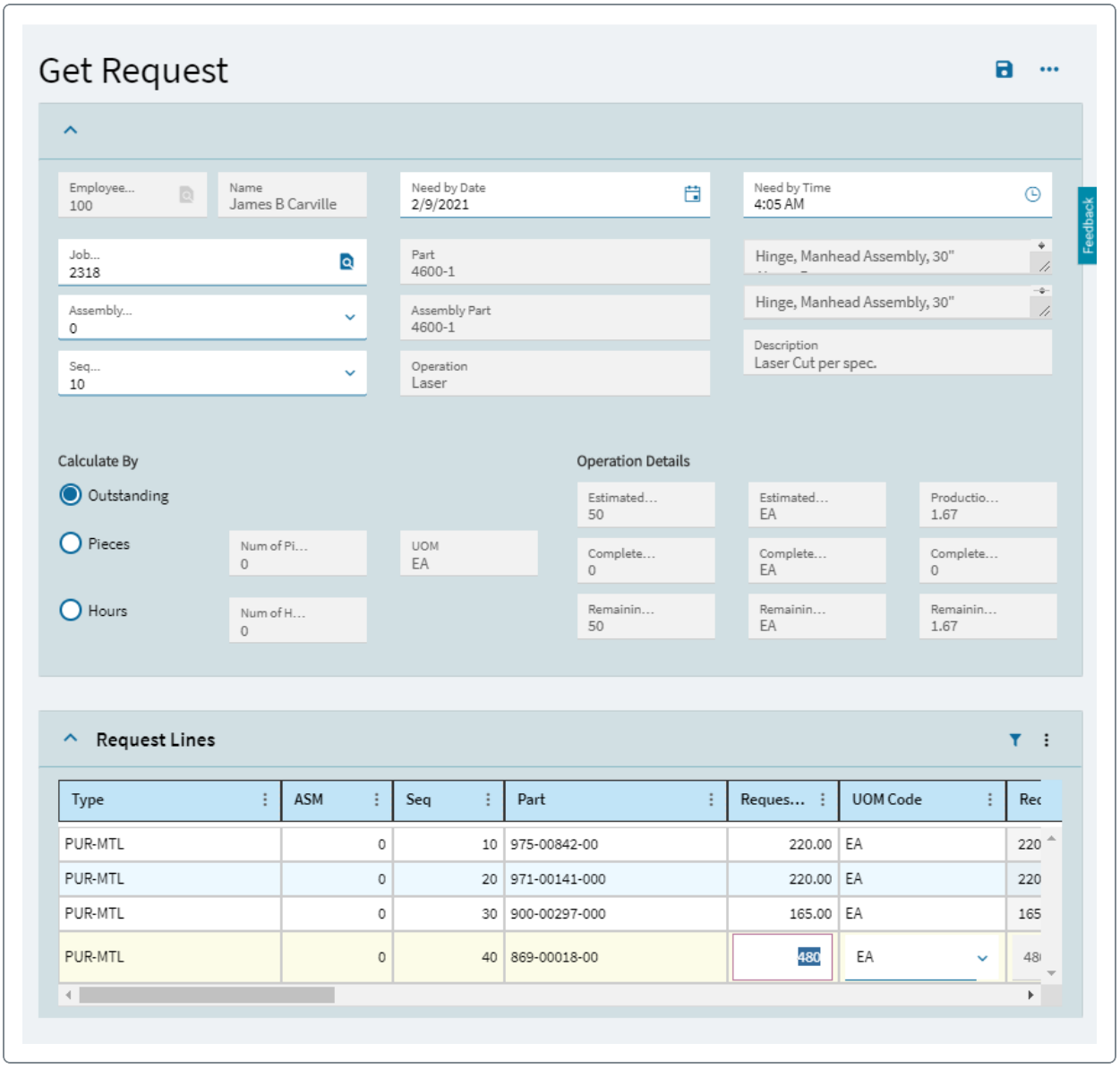


If there are any documents related to this job, the **Documents** button will display any documentation attached to the job. These files need to be on a central access area and the viewer program must be installed on your Data Collection terminal. Select **Download** to download the documents.



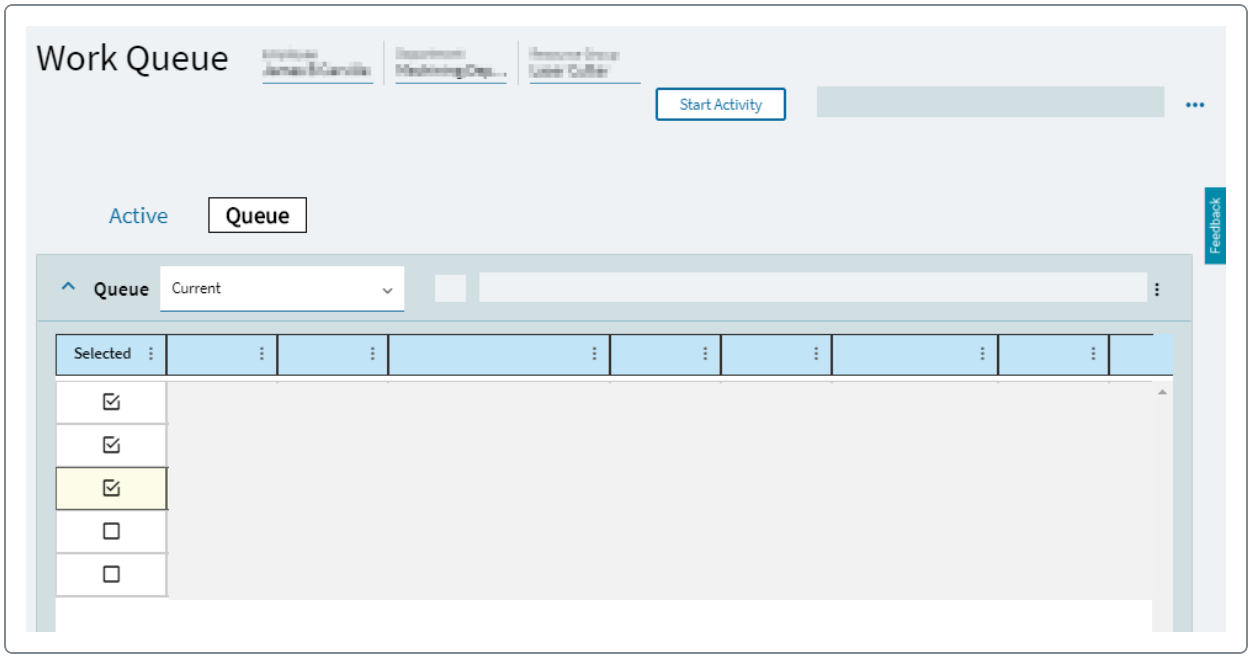
To deliver the right parts to the proper resource for the selected job operation, use the **Get Request** button, located next to the **Documents** button.

You can request either raw materials or WIP product to the pick queue.



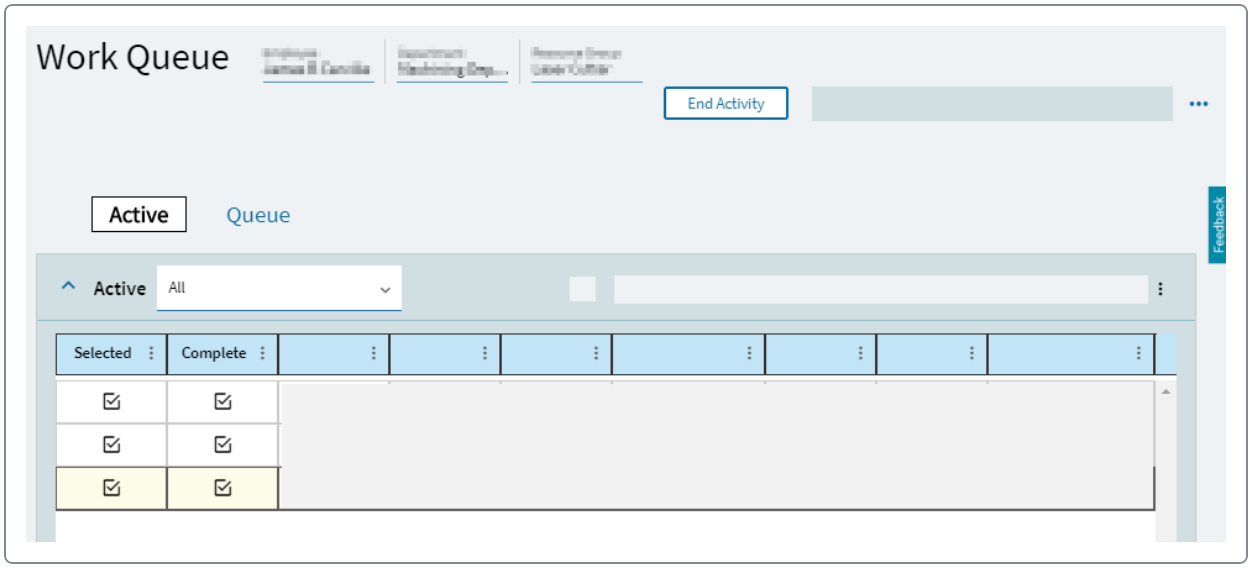
You can then process these requests in the **Material Queue**. Once the application processes the request, it then creates a material transaction that can change the cost, quantity, and/or location of this material.

Now, let's suppose you want to start production for multiple job operations. Select the **Queue**button, and filter the grid to display the **Current** work queue. Then place a check mark in the **Selected** column for each job that is expected to be started on this shift or in the amount of time being planned.



Tap on the **Start Activity** button to move the selected jobs to the **Active** work.

To report job completion, select the **Active** button and place a check mark in the **Selected** and **Complete** columns for the job that is complete.



Review and change, if necessary, the quantity in the **Labor Quantity**, **Scrap Quantity**, **Scrap Reason**, **Non-Conformance Quantity**, and **Non-Conformance Reason** columns.

The app marks the operation complete if the reported Labor Quantity is equal to, or greater than the amount required for the Job. If the reported amount is less than what is required, the operation won't be marked complete.

Select the **End Activity** button.

Starting and Ending Activity in Data Collection

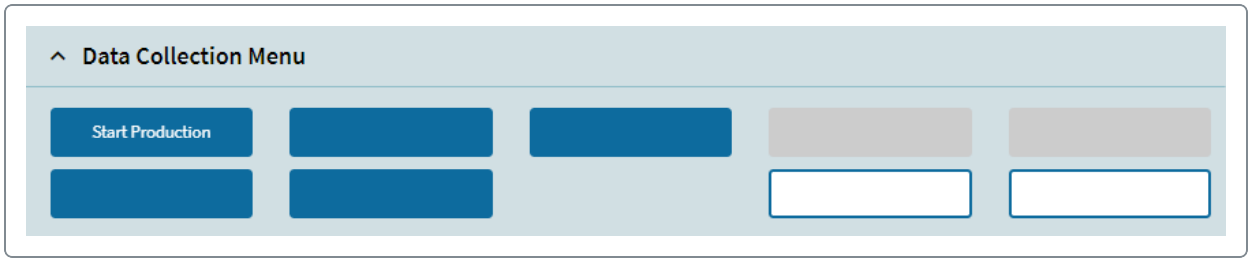
To work on any type of activity (production, setup, rework or indirect), you need to start it. When the job is complete or your shift is over, end the activity.

You should always log out after starting or ending activity to leave the sheet blank for the next worker.

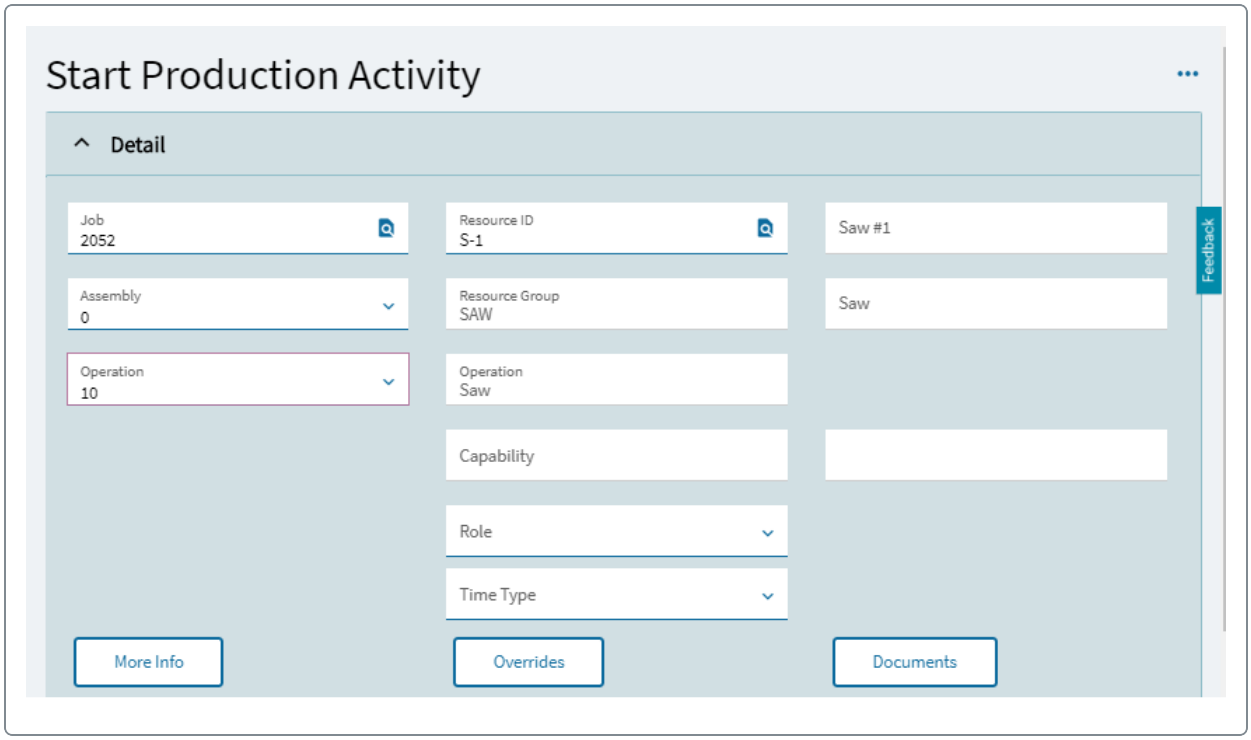
Starting/Ending a Production Activity

Start a direct labor activity or production on a job. This is labor that is manufacturing part quantities on a job.

1. Select **Start Production** in the **Data CollectionMenu** card.



2. Based on your Job Traveler, in the **Job** field, enter the job number on which you are going to work and press **Tab**.
3. In the **Operation** field, select the operation on which you are going to work - the **Resource ID** will get brought in automatically from the Job. You can still change the resource if you need.

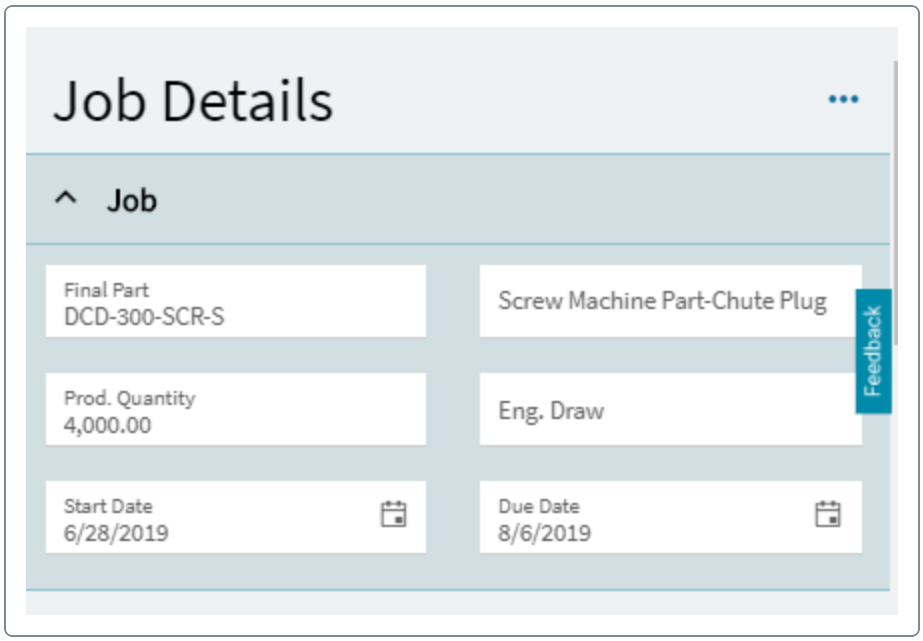


On this page, you can drill down to job details, override resource groups, and view attached documents. Use the following options:

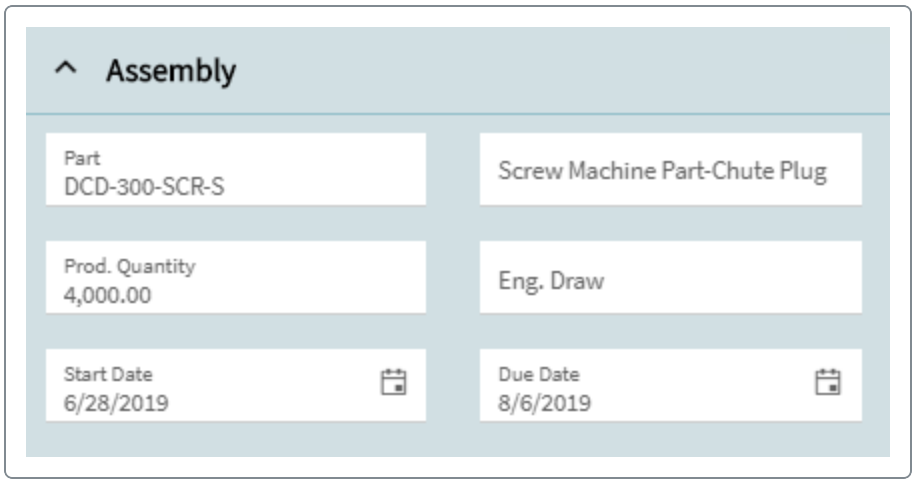
Select the **More Info** button to access the **Job Details** screen and view job operation information.

On the **Job Details** screen, you can view the following job details:

- **Job** - Shows the main job info, such as job start date, due date, final part, etc.

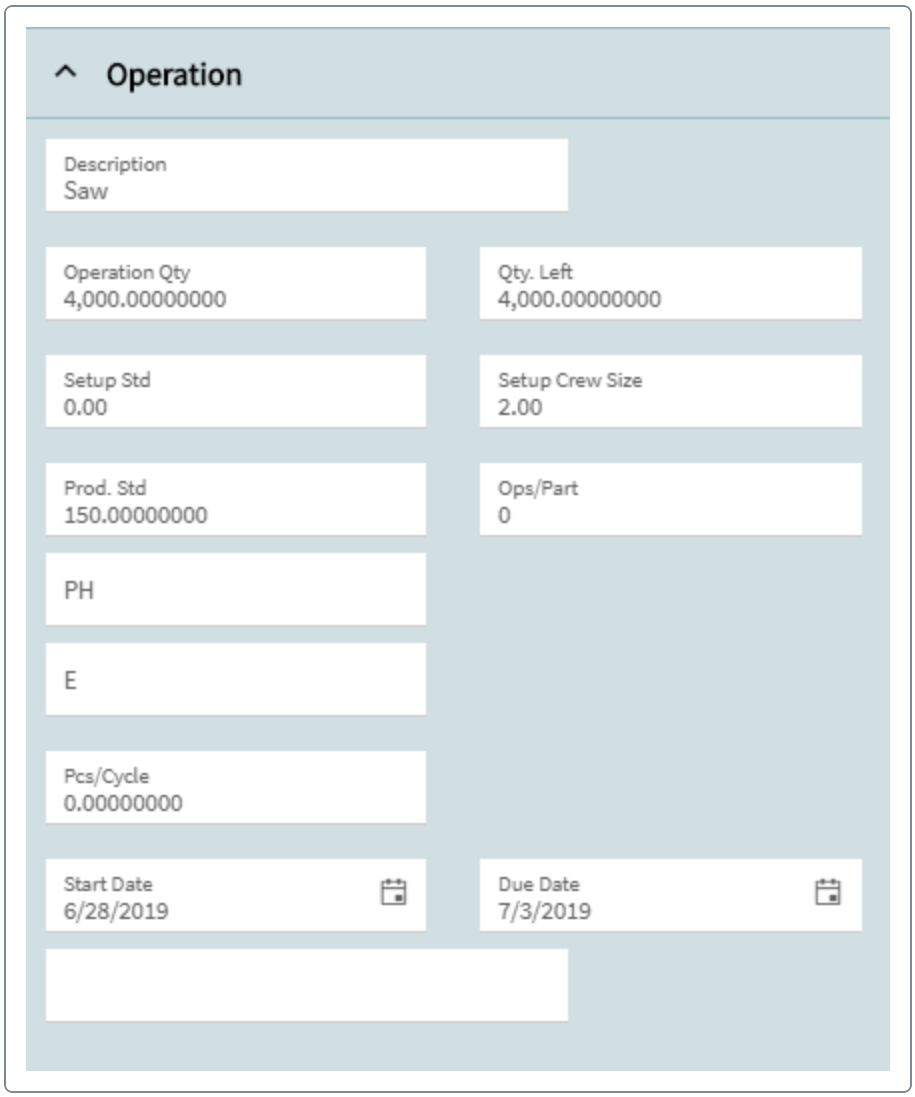


- **Assembly** - Displays the Job Assembly details, including part, production quantity, start date, due date, etc.

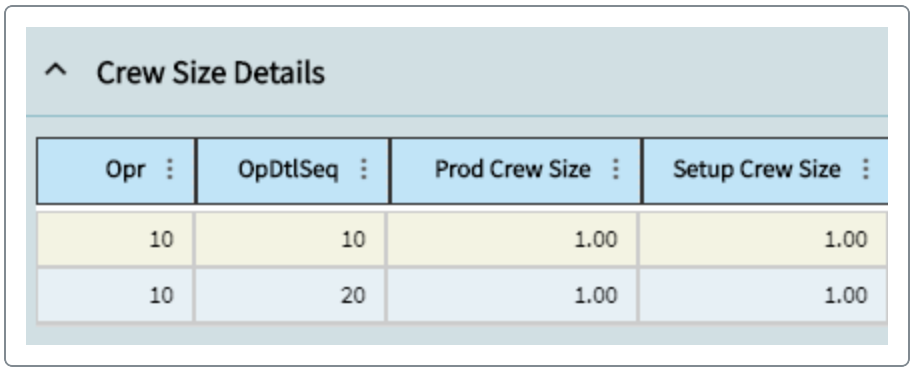


Assemblies determine the correct operation hierarchy to schedule a job. Each part has one or multiple assemblies. A parent assembly is any assembly made up of child subassemblies. If a part has no subassemblies, you only need one parent assembly for the produced end part quantity. In contrast, a part with a complex method can have several parent assemblies.

- **Operation** - Procedures that shop employees perform when working on a job.



- **Crew Size Details** - The size of production and setup crews planned for the associated job operation.

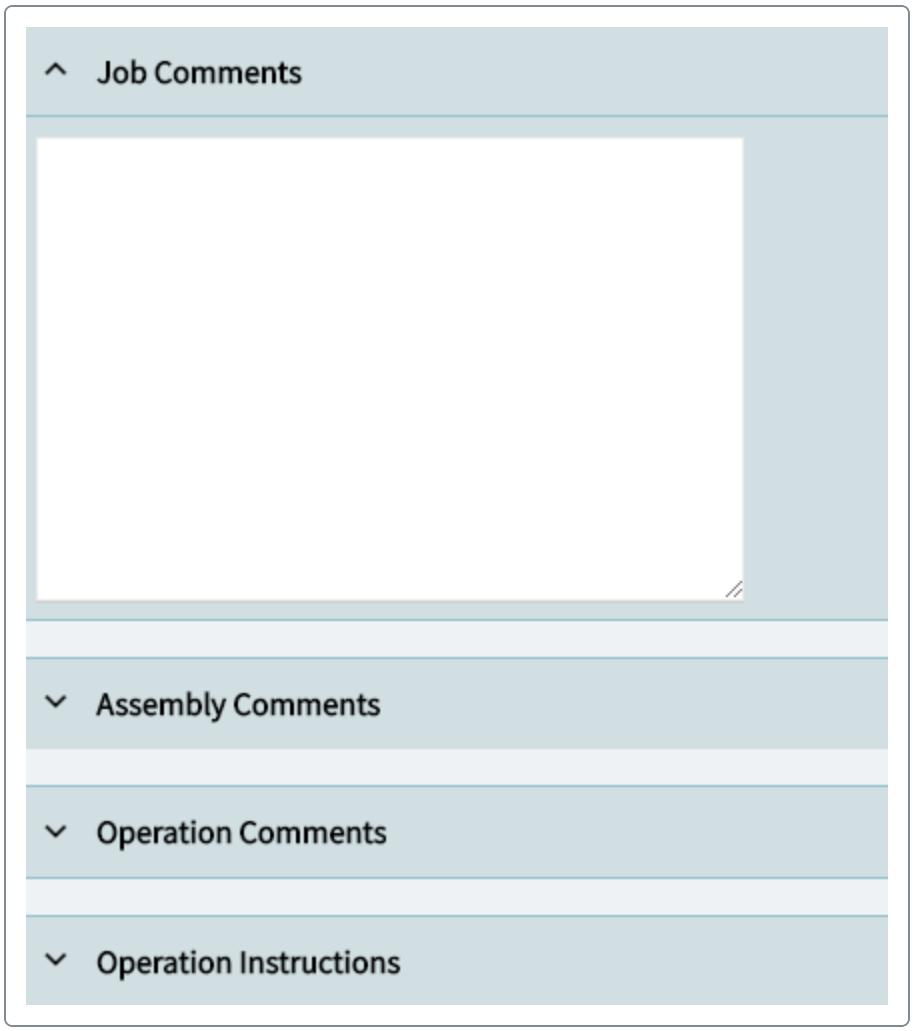


The Crew Size is used for calculating labor estimates. This value defines the average number of shop employees at this resource group who work on this resource at the same time. You define two values for each resource group; one for Setup and the other for Production. The Setup Crew Size defines the number of people it physically takes to prepare for work at the resource/resource group. The Production Crew Size defines the number of people it physically takes to manufacture part quantities at the resource.

The application uses this value as a multiplier to calculate the estimated labor cost for each operation. Do not, however, confuse crew size with resources per operation. The crew size value is a factor that increases your planned labor cost, as more people work on the job.

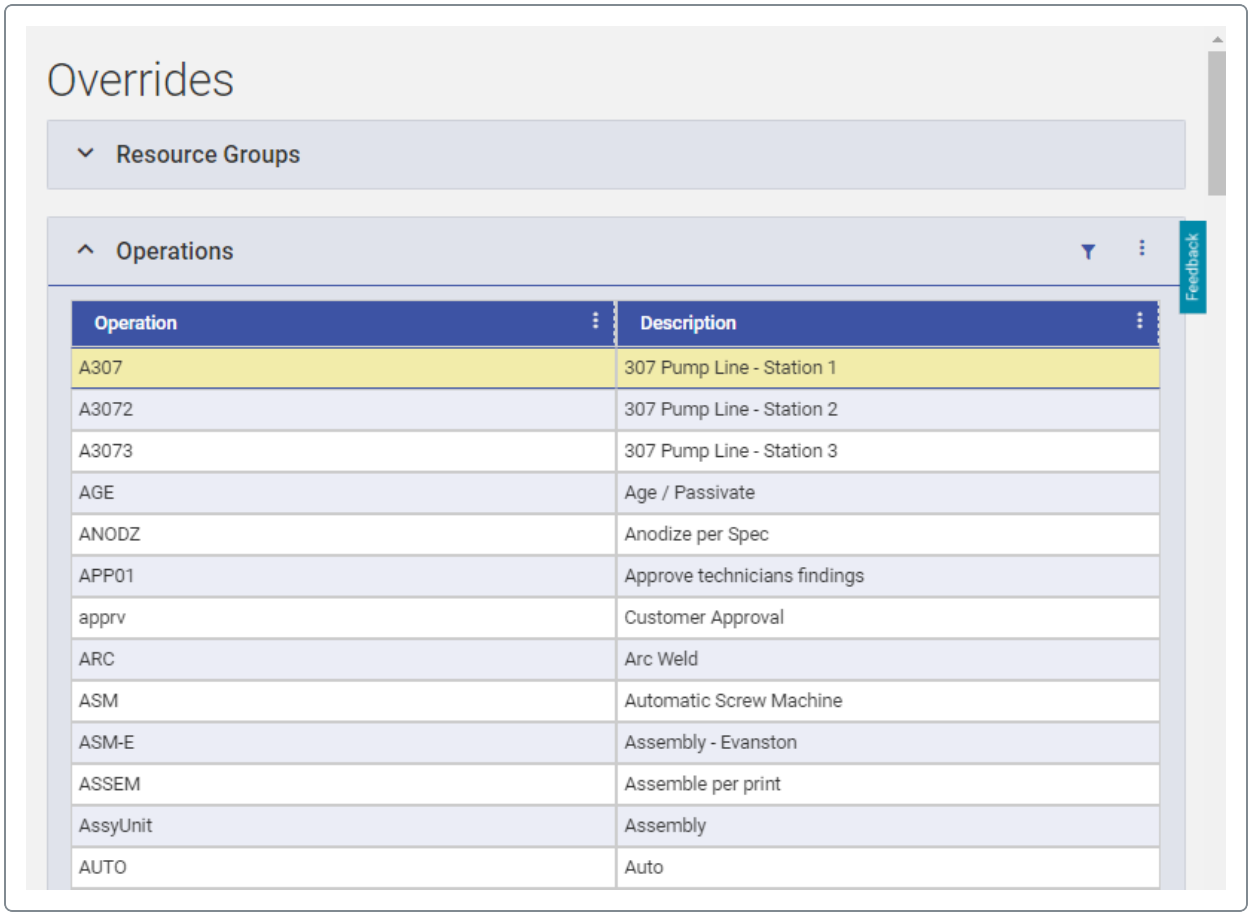
You define the Crew Size modifier on resources and resource groups; however, you can also override this default value by entering different Crew Sizes on job, quote, and part methods. Use this to define estimated labor costs on a specific job record, quote, and/or method of manufacturing.

- **Job/Assembly/Operation Comments**



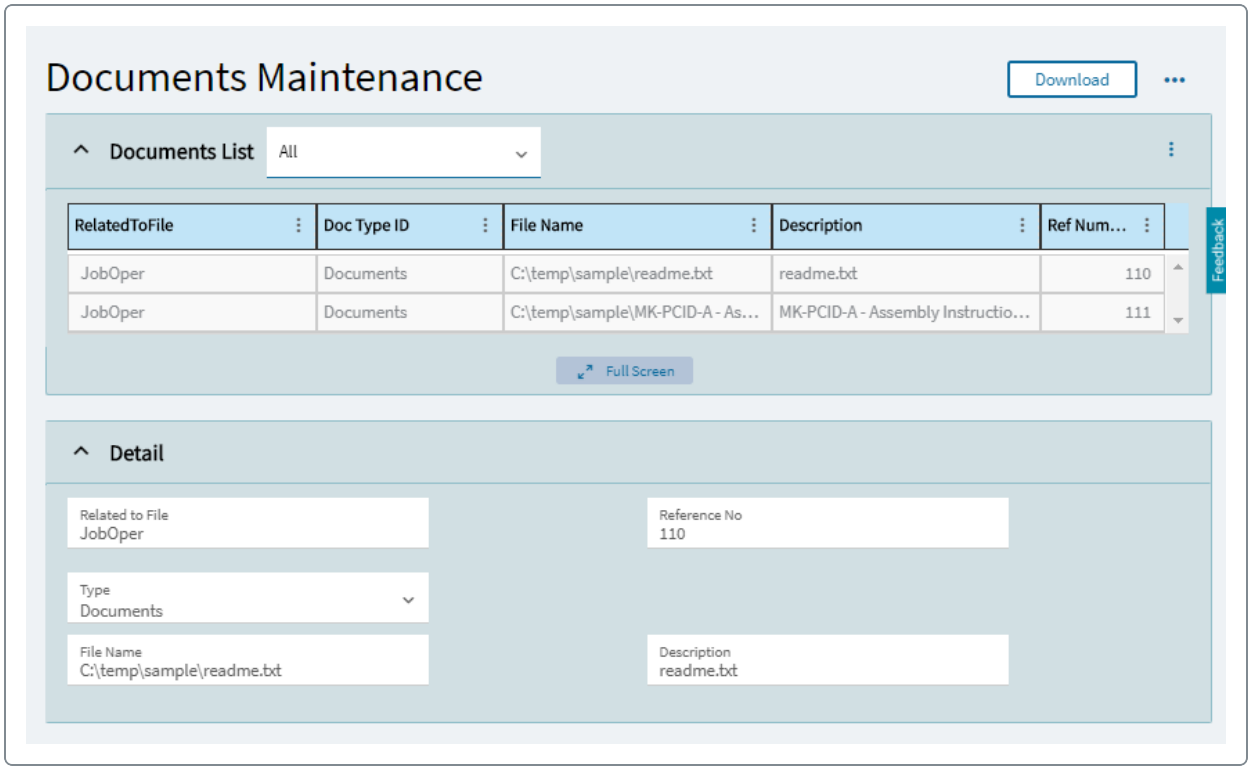
Overrides

Select the **Overrides** button to change a resource or operation from the default ones, if required.

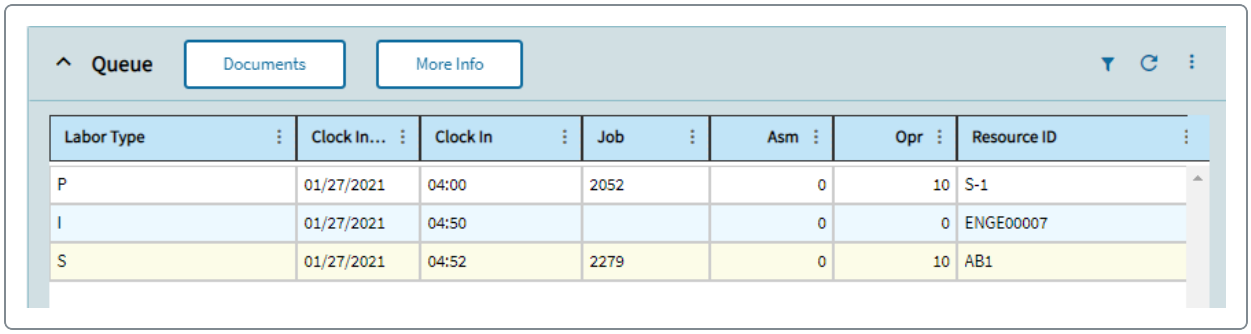


Documents

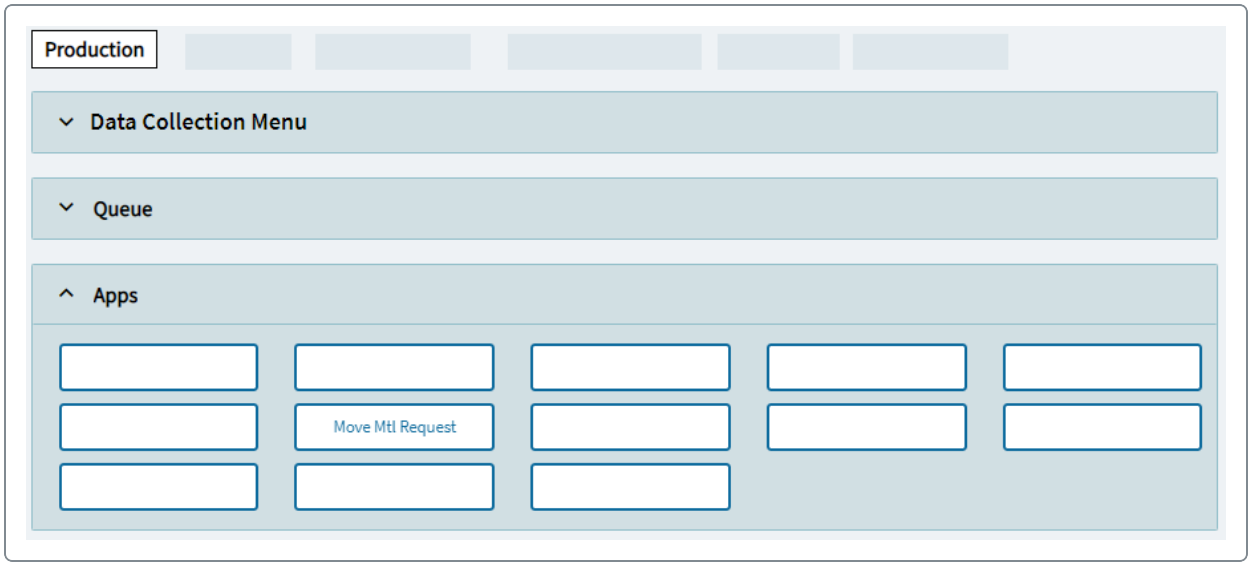
If there are any documents related to this job operation, the **Documents** button will display any documentation attached to the job. These files need to be on a central access area and the viewer program must installed on your Data Collectionterminal.



4. The job you selected for production will move from **Current Work** to **Active Work**. You can see all your active activities on the **Queue** card. The Labor type for production activities is set to **P**.



5. In case you need a material for your job, select the **Move Mtl Request** icon in the **Production > Apps** card.

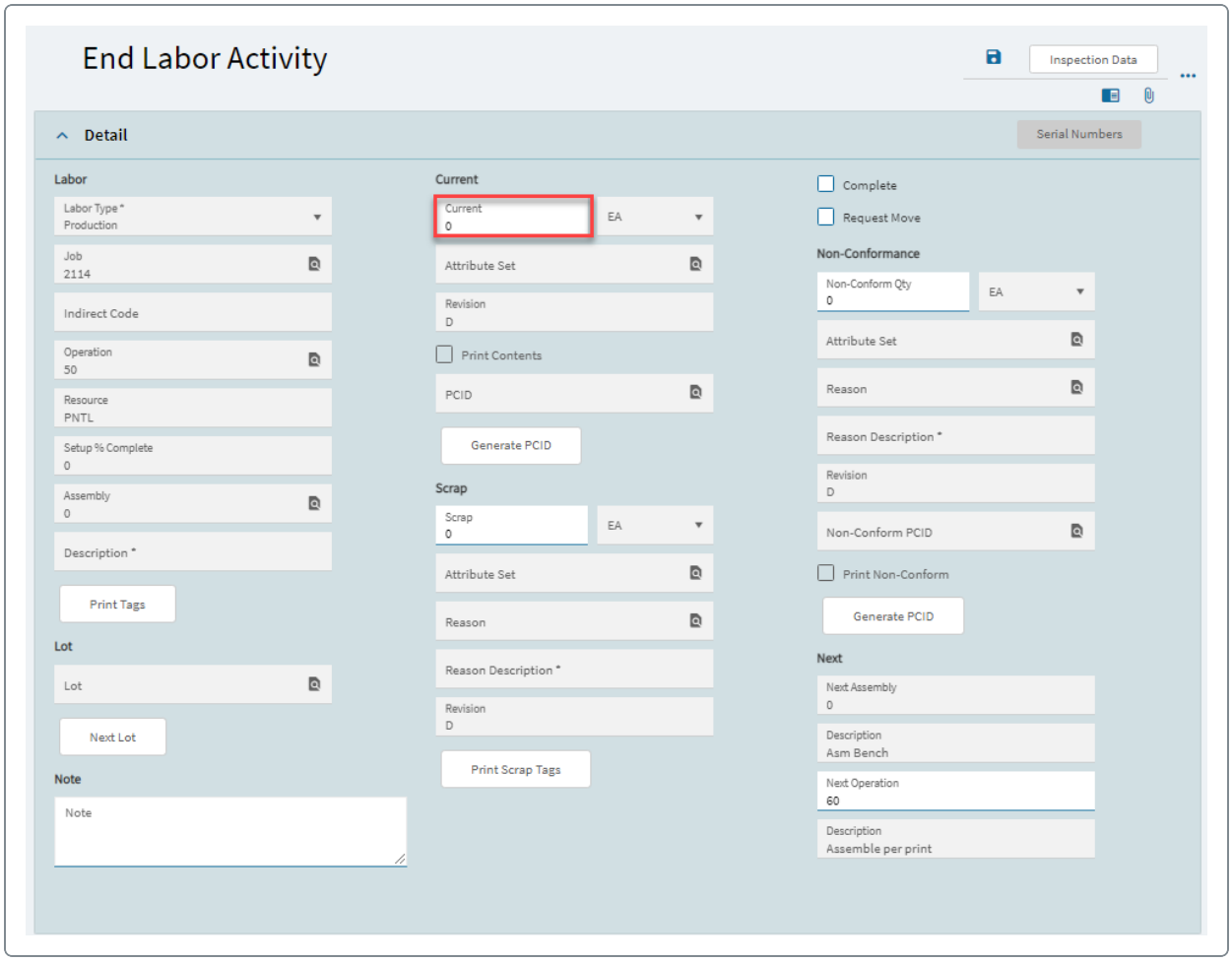


In the **Move Material Request** program, enter the job number and select the required material from the Mtl drop-down. Once you change direction to **In**, enter the required quantity of that material. Review and change the **From** and **To Warehouse** if you need. This sends a request to the **Material Handler Queue**. Repeat for all materials needed for that job. Close the Material Request window.

6. When the job is complete, select 

in the **Data Collection Menu** card.

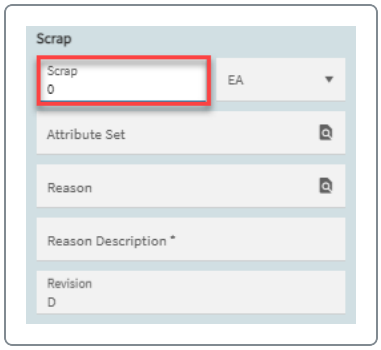
   This brings up the **End Labor Activity** panel. In the **Current** field, enter the quantity you have produced since you started the operation.



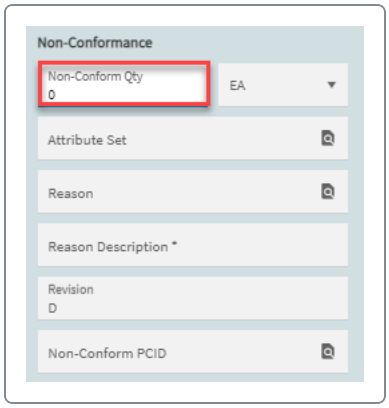
If you enter the exact quantity that the job requires you to produce, then the **Complete** check box will auto-select.

7. You may also at this point define any **scrap** or **non-conformance** quantities. Scrap means you do not care about what happens to the product that you're throwing away. Non-Conformance means you do care: this quantity goes to inspection processing in the Quality module.

8. Enter the amount of scrap in the **Scrap Qty** field.



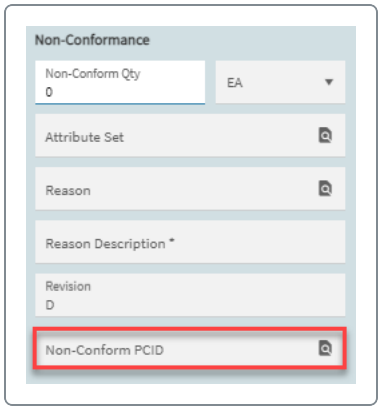
9. If you entered the scrap quantity, search for and select a reason using the Reason field.
10. Enter the amount of non-conformance pieces if any in the **Non-Conform Qty** field.



11. If you entered the non-conformance quantity, search for and select a reason using the Reason field.
12. The **Scrap** and **Non-Conformance** group boxes include the **Attribute Set** field where you can search for an select an attribute set.

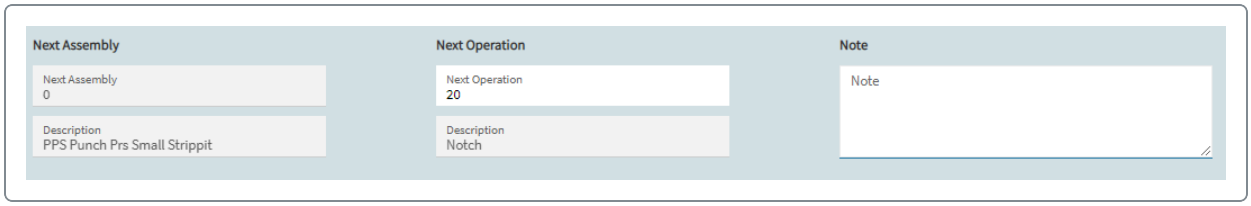
> To learn more about attribute sets, review the Understanding Attribute Sets article.

13. If the non-conformance quantity you reported belong to a PCID, search for and select the PCID using the Non-Conformance PCID field.



You can also generate a new PCID at the time of reporting the produced quantity using the Generate PCID button located in the Non-Conformance group box.

14. Learn the **Next Assembly**, **Next Operation**, and **Note** group boxes.



- **Next Assembly** - Shows the number of the job assembly you have to manufacture once this assembly is completed. For example, your job may hold multi-assembly. Let's say, '0' and '1'. When you end activity for the last operation on assembly '0', then the 'Next Assembly' field would displays '1', as this is the assembly to still need to complete. It all depends how you set u your job.

  The job in this example is a single assembly job.

- **Next Operation** - Displays the next operation sequence. Let's say you completed operation '10' so operation '20' would display.

- **Note** - Enter a note, if any.

15. Selecting the **Print Tags** button will allow you to print box labels for the product made.

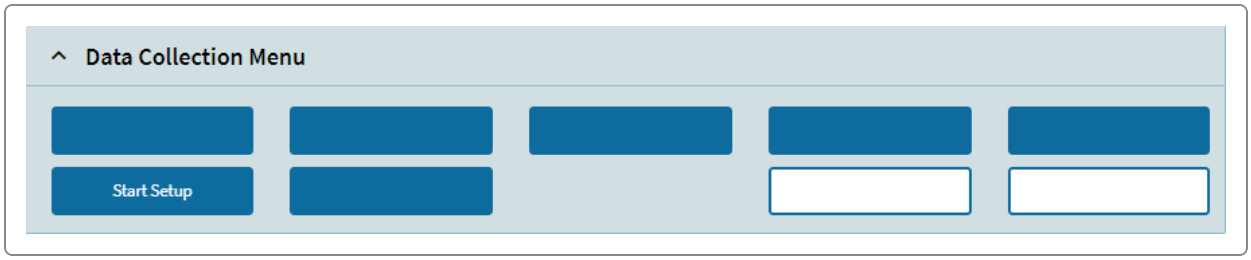
16. Only select the **Complete** check box if you are done with that operation and ready to move to the next one. The **Request Move** check box will send a request to the Material Handler to come pick up the product made.

17. You are now clocked out of that job, but still clocked into the system. Either start another activity or select the **Clock Out** button.

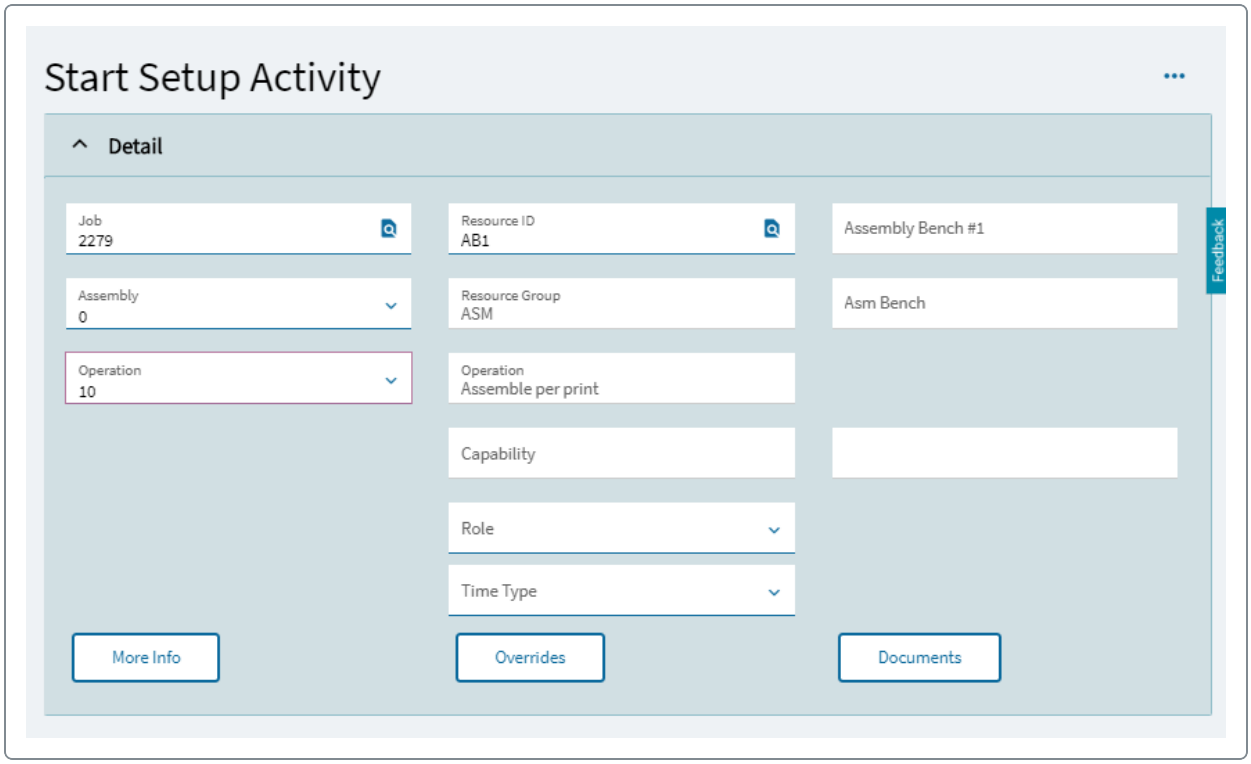
Starting/Ending a Setup Activity

Not all jobs have set-up time defined, but if yours does, you start the setup activity. Setup may be required based upon the operation being performed. For example, you need to cut the material with a CNC machine. The tool used to do the cutting needs to be attached onto the machine. Start setup captures this for reporting purposes.

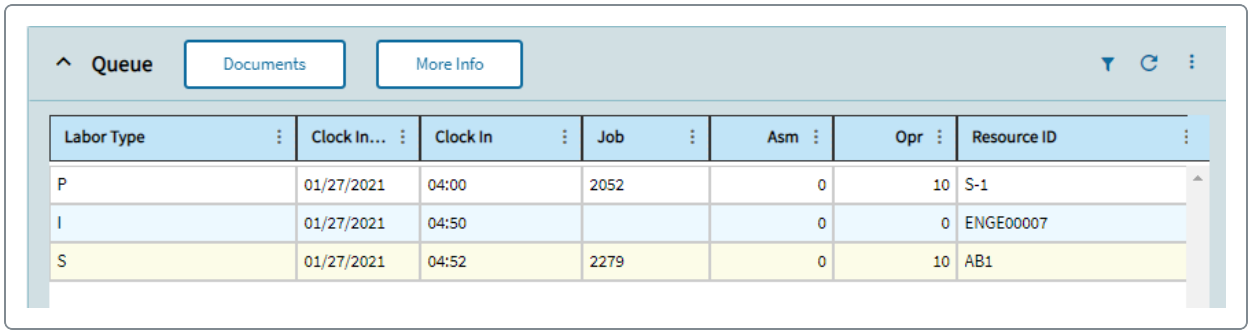
1. In the **Data Collection Menu** card, select **Start Setup**.



2. Based on your Job Traveler report, in the **Job** field, enter the job number on which you are going to work and press **Tab**.
3. In the **Assembly** field, select the assembly on which you are going to work. If your job does not have any subassemblies, you can skip this field.
4. In the **Operation** field, select the operation on which you are going to work – the **Resource ID** will get brought in automatically from the Job. You can still change the resource if you need.

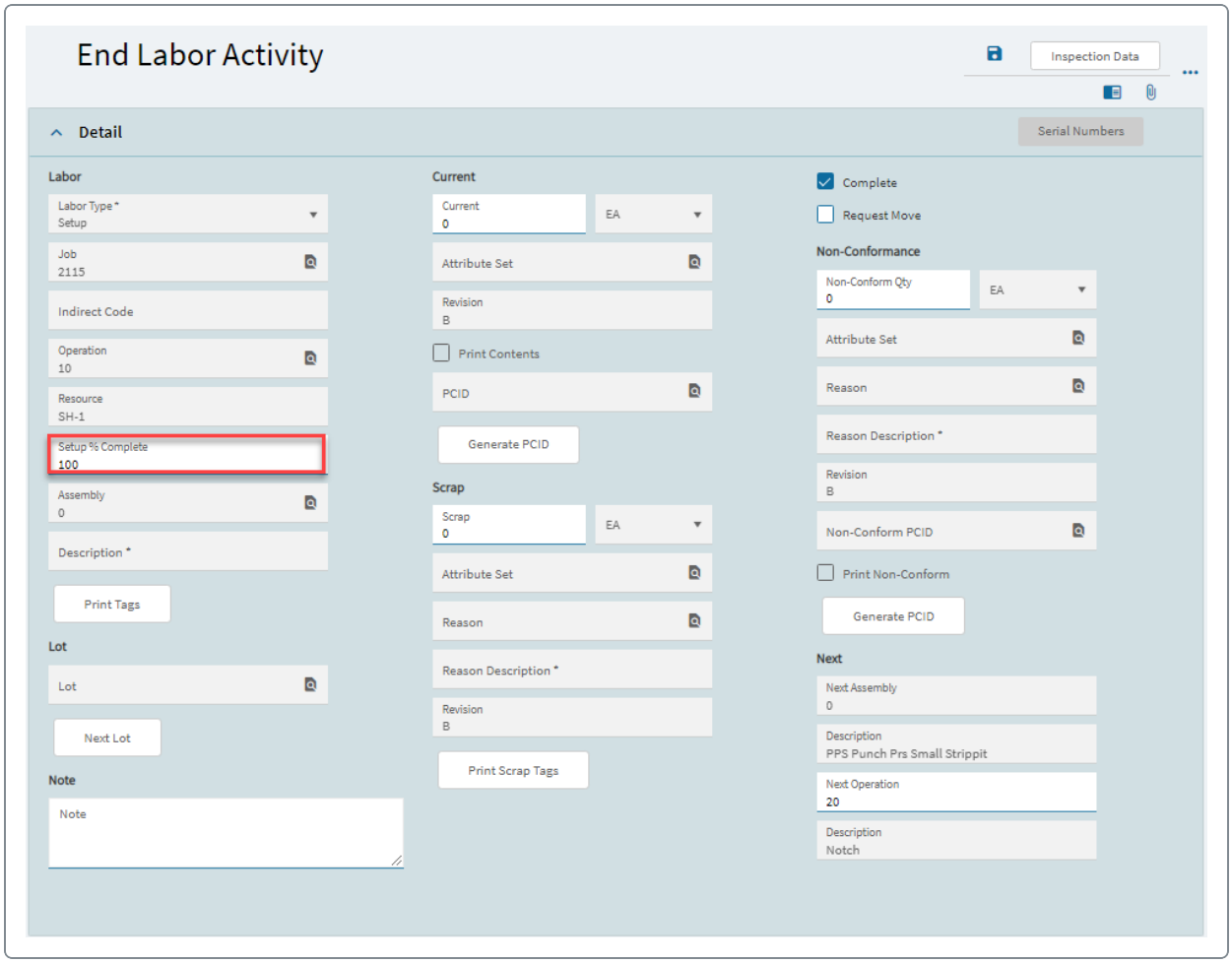


5. The job you selected for setup will move from **Current Work** to **Active Work**. You can see all your active work in the **Queue** card. The Labor type for setup activities is set to **S**.



6. When you are done with this setup activity, select your activity from the queue list, and then select End Activity back on the **Data Collection Menu** card. Also ensure that you have selected the correct line item. It is possible for a single employee to be logged into more than one activity at the same time.

7. In the **Setup % Complete** field, enter **100** and select **OK**.



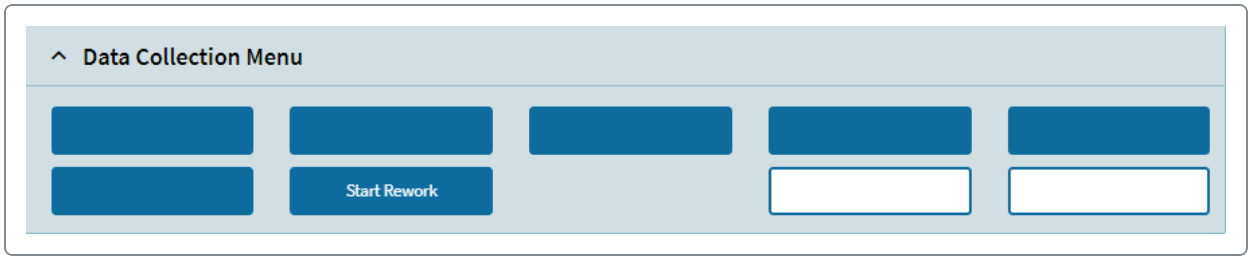
You can also enter the 'Scrap' and 'Non-Conformance' qty if required. This is the same for Ending Production on a job.

Starting/Ending a Rework Activity

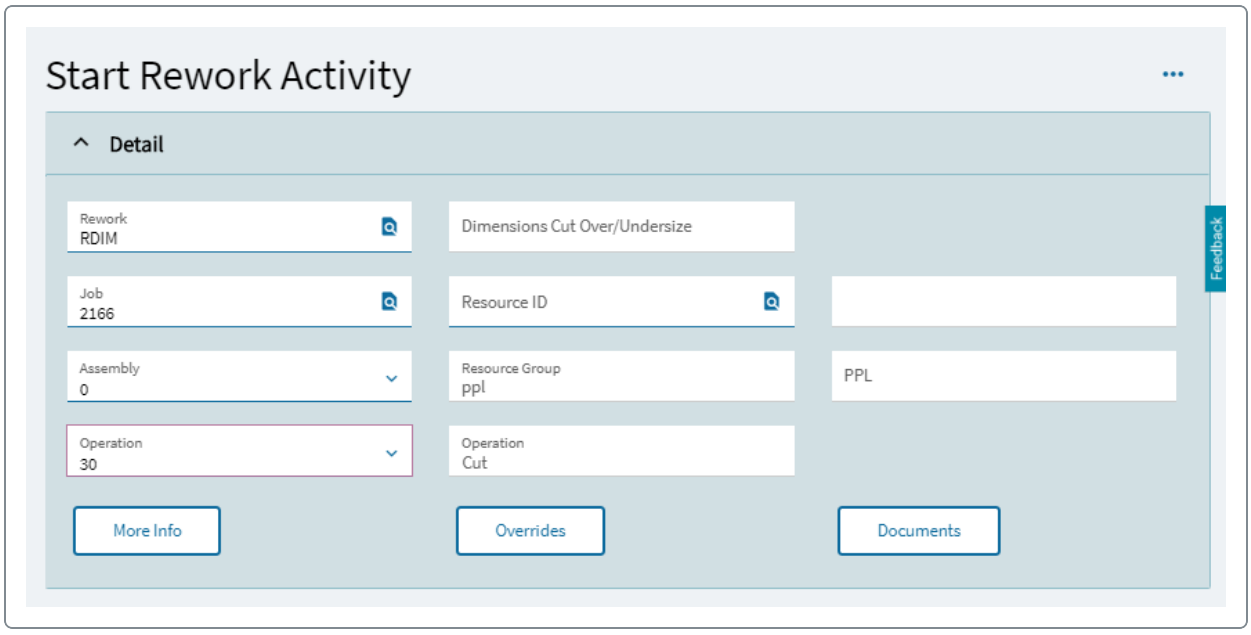
You perform rework activities when items have been sent back to production due to a correctable defect and need to be re-worked. For example, a part fails inspection due to an incorrect dimension cut measurement.

Rework is similar to the standard 'Start and End Activity' processing. The only difference is that you are reworking a job that failed to produce items in line with your production standards and the items needs to be reworked.

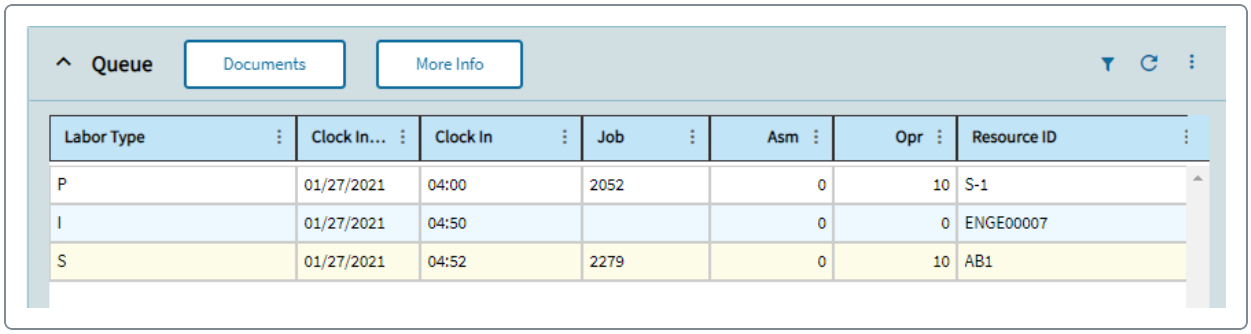
1. In the **Data Collection Menu** card, select **Start Rework**.



2. Select the **Rework** activity.
3. To recover the part's value, select a job and operation that need rework.



4. You are now working on the rework activity. You can see it in your active queue. The Labor type for setup activities is set to **P** (Production).

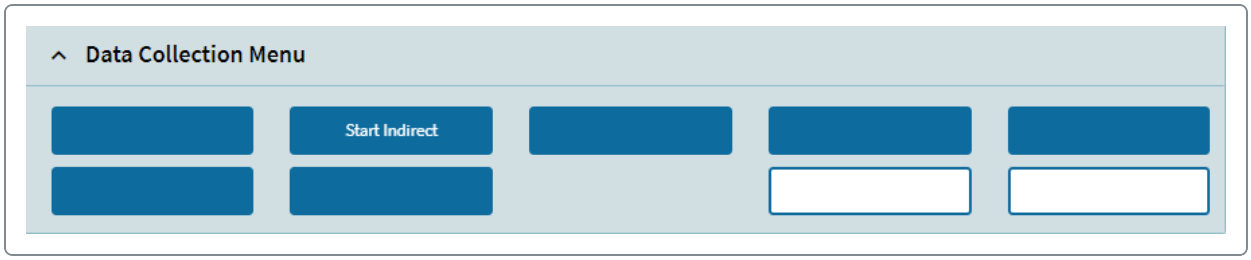


5. When the rework is complete or the shift is over, select your activity from the queue list, and then select the End Activity in the **Data Collection Menu** card. This brings up the **End Labor Activity** window. The process of ending the Rework activity is identical to ending the Production Activity.

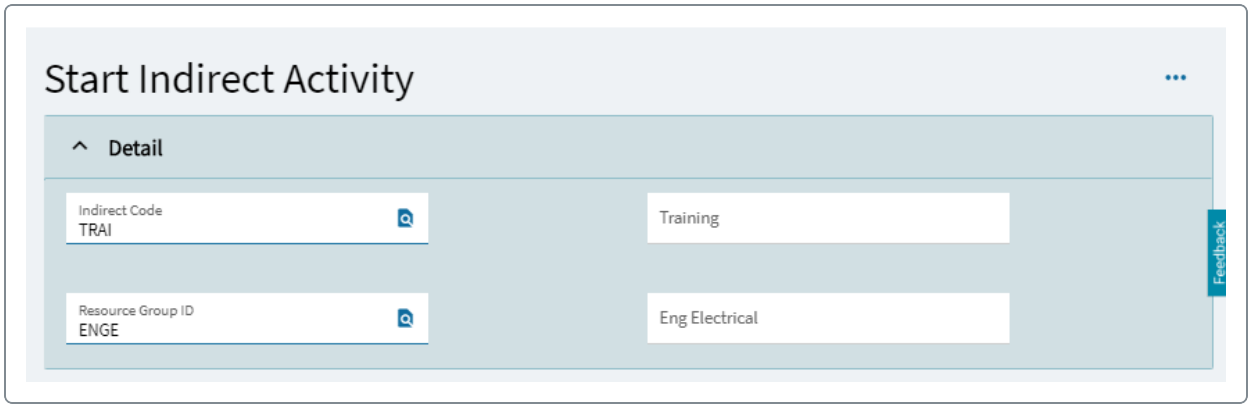
Starting/Ending an Indirect Activity

If you need to start an activity which is not directly associated with production, like maintenance or cleaning, start an indirect activity.

1. In the **Data Collection Menu** card, select **Start Indirect**.

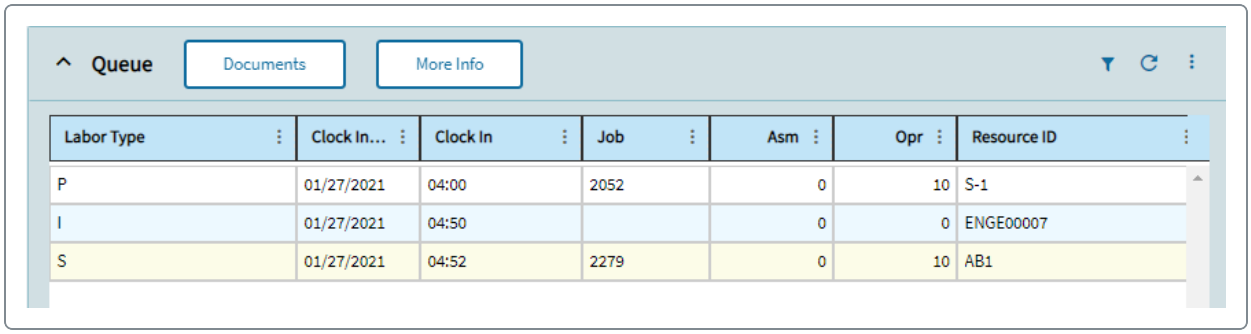


2. Select the **Indirect Code** and **Resource Group ID**.



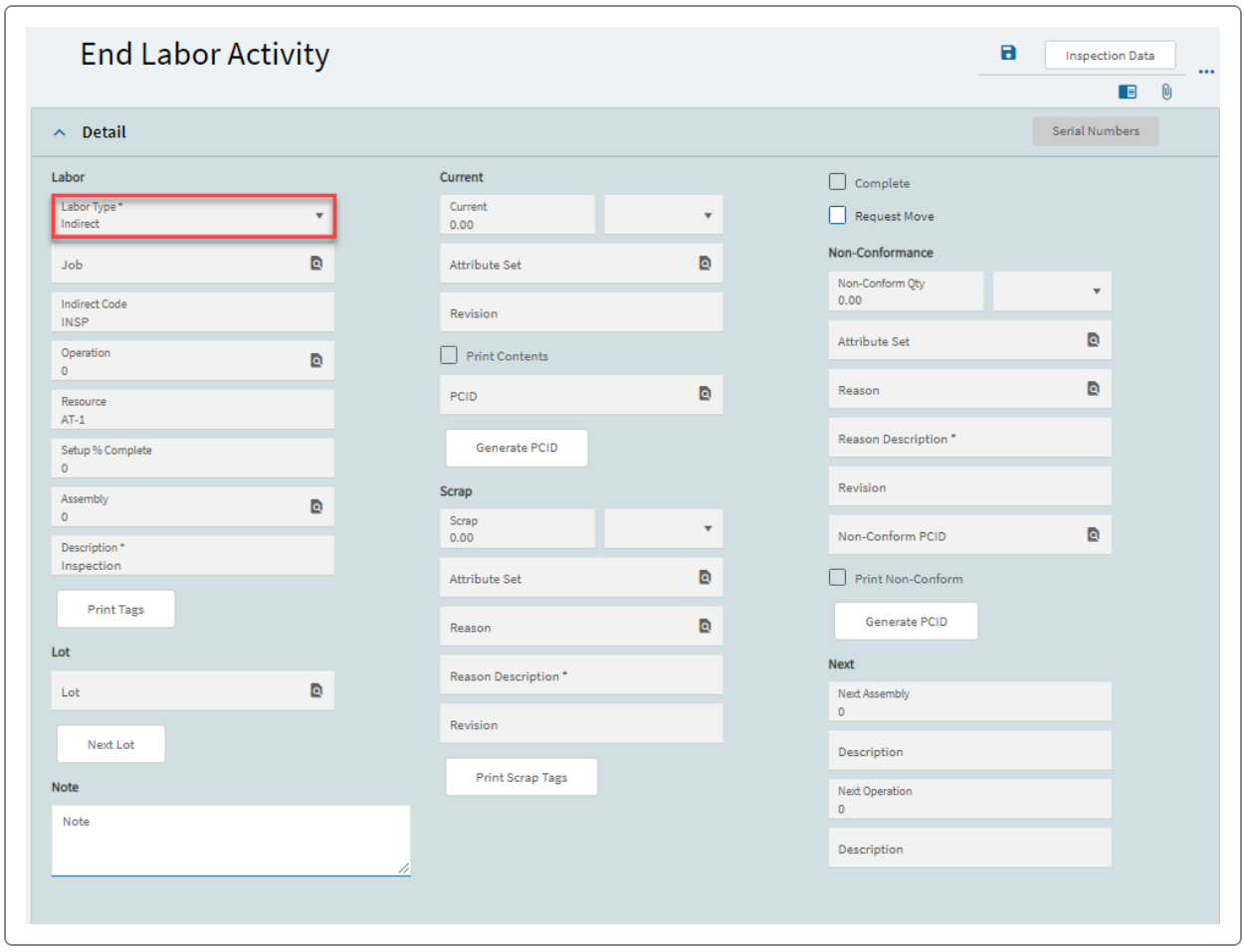
3. Select **OK**.

   You are now working on the indirect activity. You can see it in your active queue. All indirect activities have **I** for Labor Type.



4. When the job is complete or the shift is over, select your activity from the queue list, and then select the **End Activity** in the **Data Collection Menu** card. This brings up the **End Labor Activity** window.

> Note that the Indirect Activity has no quantities or set-up % involved – you are just tracking time spent working on something in the plant.



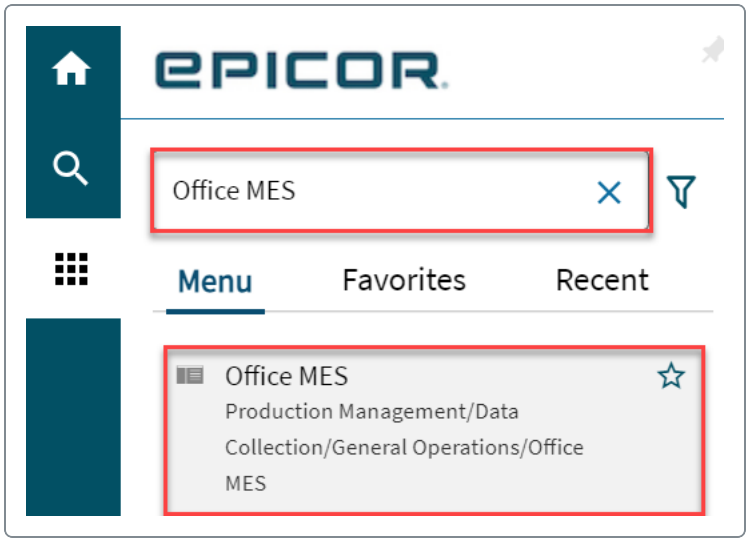
Select **OK** to end the activity.

Reporting Quantity in Data Collection

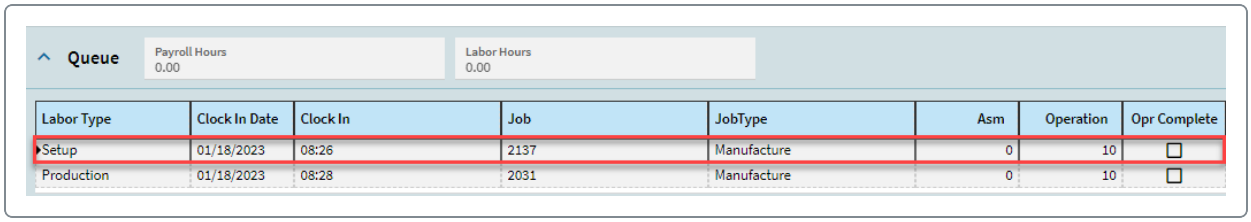
The **Report Quantity** app lets you report that a production quantity is complete against a specific operation without having to end an activity. It also lets you request to move the skid or pallet on to the next operation.

If you select the 'Override Job Number' check box on your user record in the 'Employee' app, you can do this without having to clock out of the operation. However, if you do not have these rights, you can still do this without having to end the activity.

1. Open the **Office MES** app.

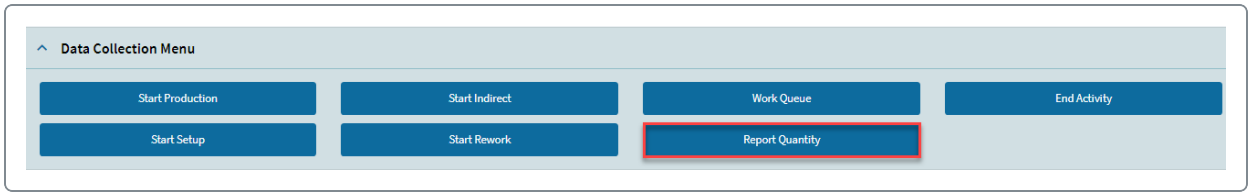


2. On the Queue card, highlight a job record line inside the grid.



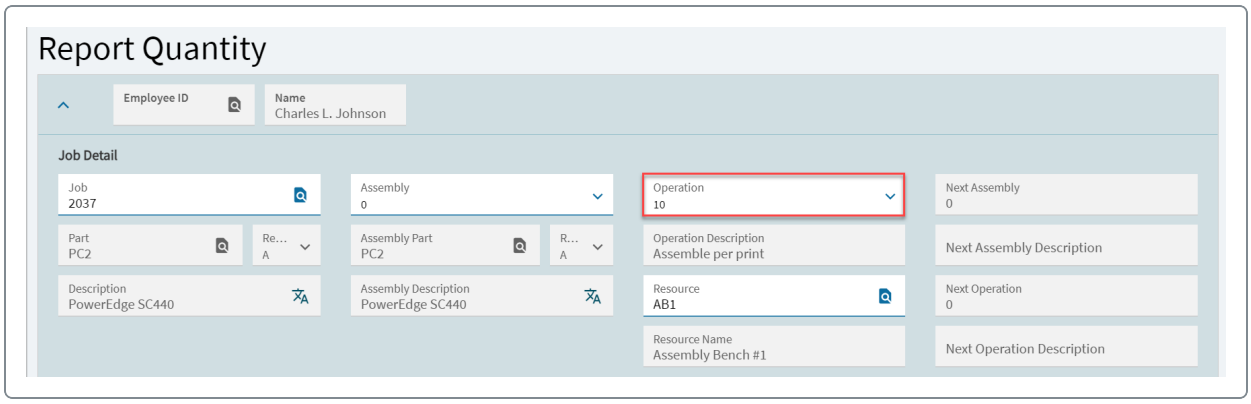
3. Select **Report Quantity** on the Data Collection Menu card.

   The **Report Quantity** panel opens.

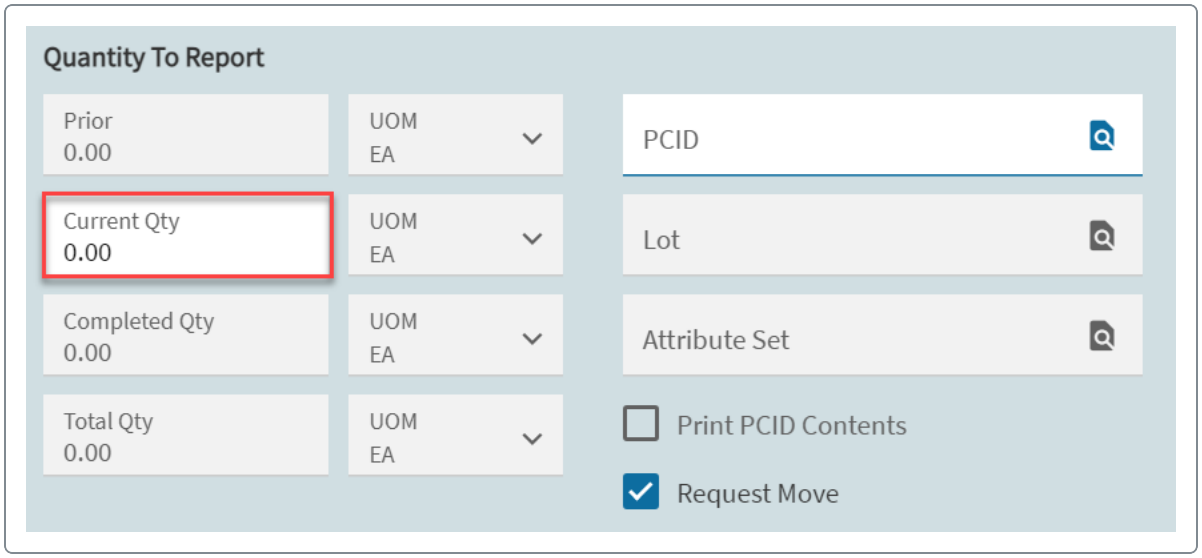


You can report quantity without having to end an activity.

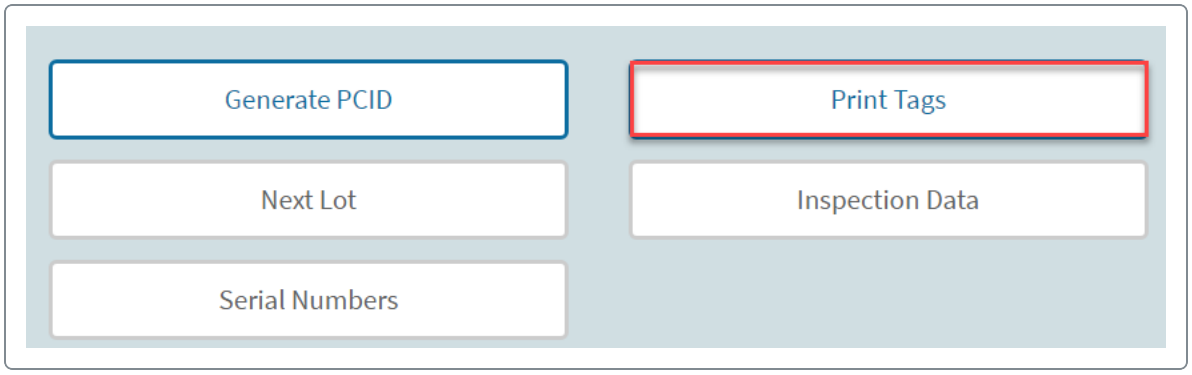
4. From the **Operation** drop-down, select the job operation that you're reporting the quantity against.



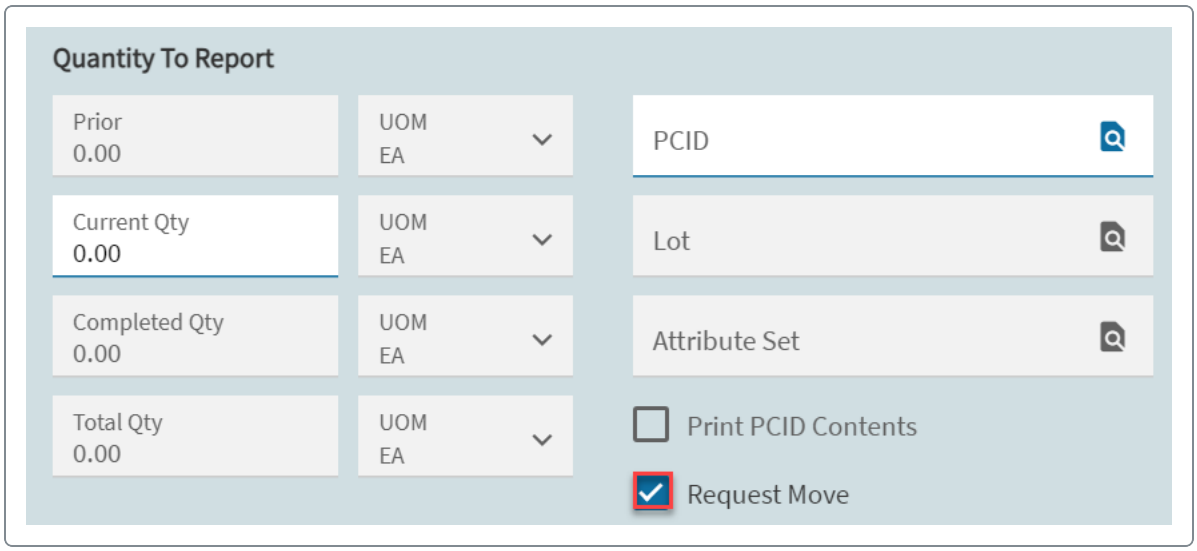
5. Enter the quantity that you are reporting in the **Current Quantity** field.



6. If you have your current quantity entered, the **Print Tags** button displays, and you can generate tags for the material transaction.

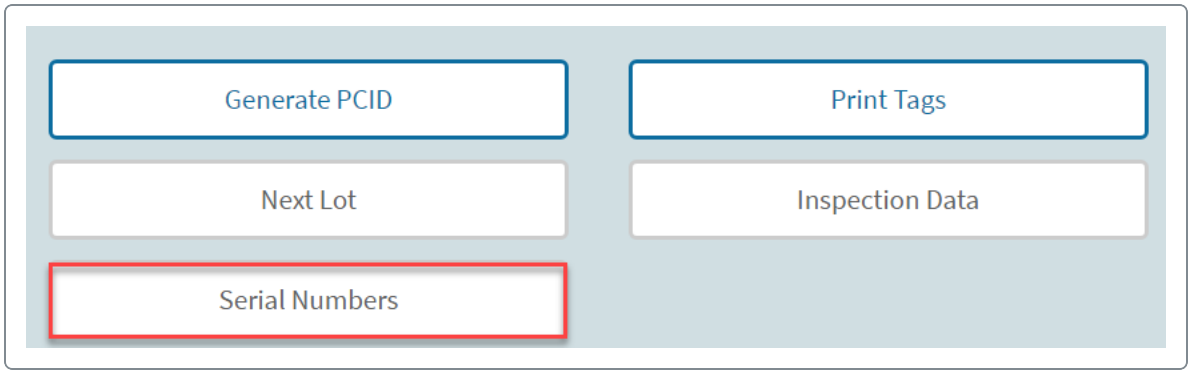


7. Select the **Request Move**check box to generate a request to move of the completed quantity to the correct warehouse and warehouse bin.

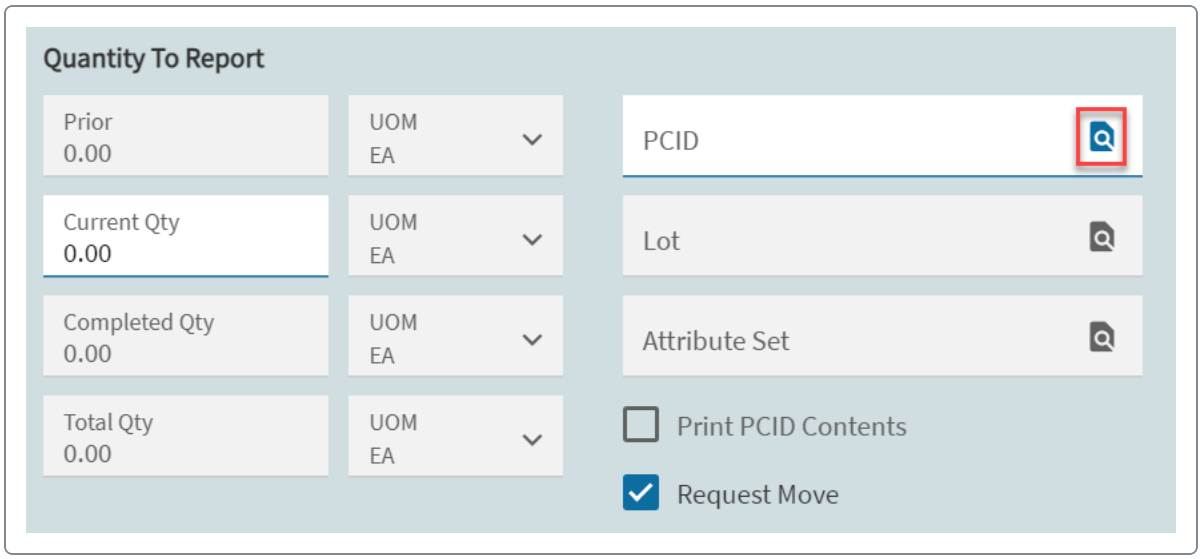


The generated transaction displays in the 'Material Request Queue' app.

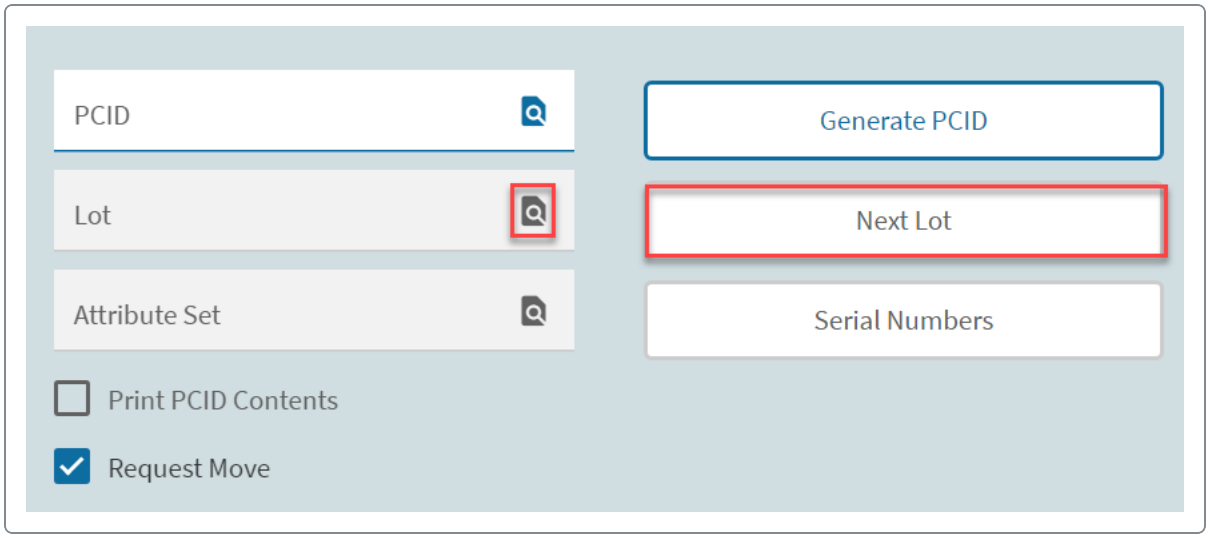
8. If the job operation for which you report quantity is set to **Serial Number Required For This Operation** or the reported job part is a serial tracked part, you select the **Serial Numbers** button to search for and select a serial number.



9. You can also generate a new PCID or search for an existing one if the reported quantity belong to one.



10. If the material you are reporting is a lot tracked item, you select an existing lot or have Kinetic to assign one using the **Next Lot** button.



11. Select **OK** inside the **Report Quantity** panel.

Reporting Downtime in Data Collection

In Data Collection, you can report downtime against a job. You use downtime when the resource is in production and something interrupts that production, and the resource is down requiring immediate attention. Or, for example there is electricity outage or you are waiting for materials. This is different from indirect codes you use to track non-production time for a variety of reasons. When you report downtime, you must select the downtime code that outlines the nature of the issue. You set up these codes in **Indirect Labor Code Maintenance** and mark them as **Downtime**.

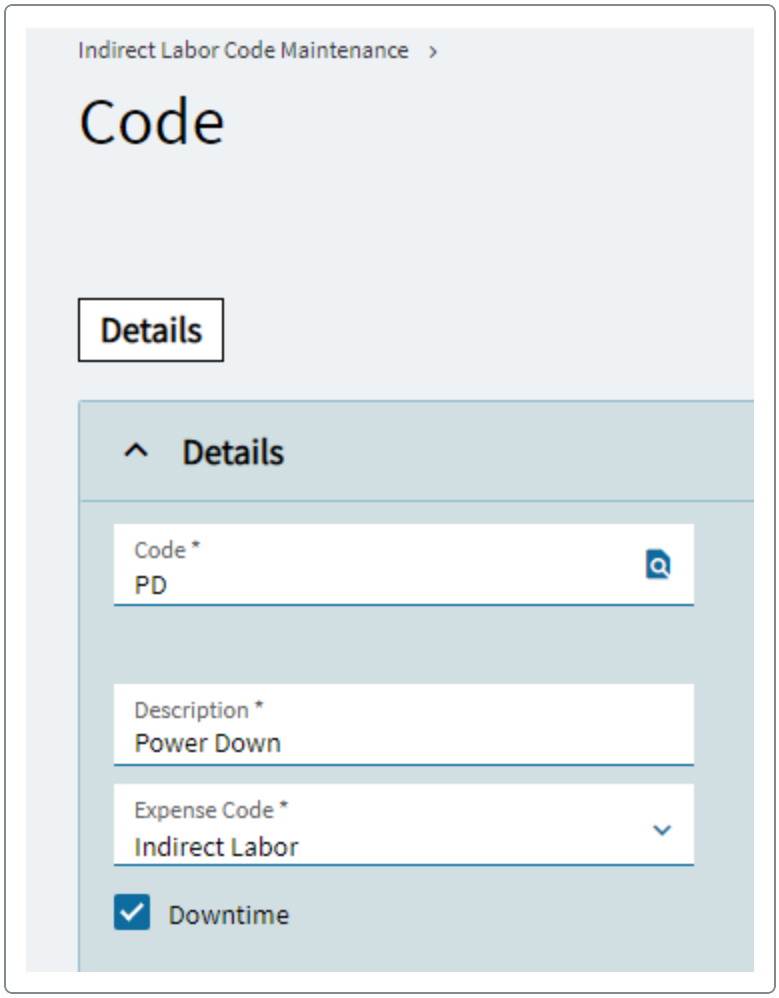
Example

You start production activity on job, but the machine runs out of material and you are waiting for material to continue. Instead of clocking out of the job, you report downtime by selecting an appropriate indirect code. When you select the **Downtime** button, it suspends time to any job(s) you are currently clocked into and starts accruing time to the selected downtime code. When whatever condition that caused the downtime is resolved, you end downtime, and time again starts to accrue to the job(s).

You can also report downtime through **Time and Expense Entry**, but you must do any job time adjustments for downtime manually.

Setting Up Downtime Codes

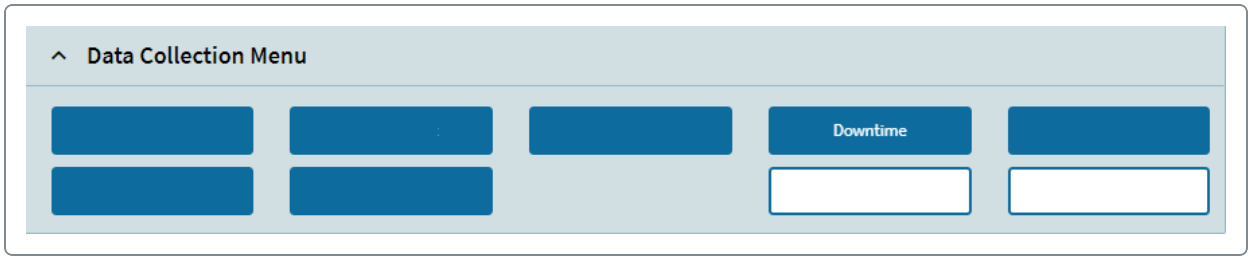
In **Indirect Labor Code Maintenance**, enter the **PD - Power Down** code, and select the **Downtime** check box.



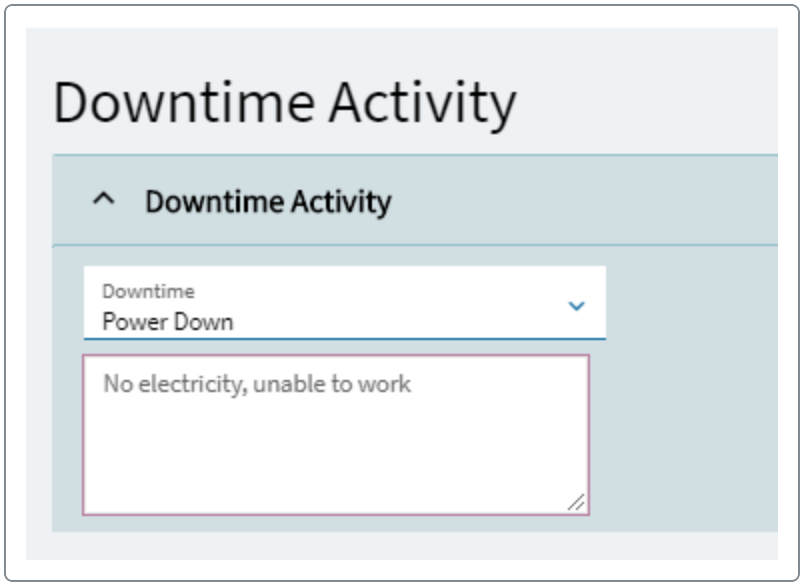
For more information, refer to the Adding Indirect Labor Codes article.

Entering Downtime

Let's now enter downtime for one of the existing jobs. As you will see, to execute Downtime is very simple. You start by logging in Data Collection and starting an activity. You then select the **Downtime** button on the Data Collection Menu to report the downtime.



From the **Downtime** drop-down, **select Power Down**. Add a note, for example, **No electricity, unable to work**.



Once the power is restored, select the **End Downtime** button. This was a short downtime, and you are now back to production. Once the job is over or your shift is over, you can End Activity and Clock Out.

Entering Time

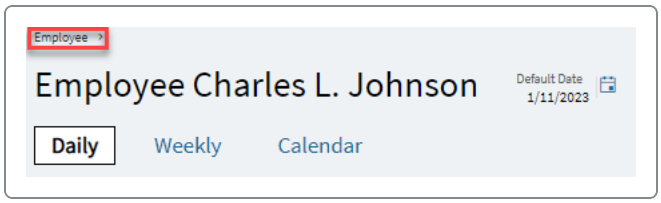
Enter employee hours for indirect labor, production labor, or project labor and submit those hours for approval.

Entering Time

You can enter time on a daily or weekly basis. After time transactions are entered, you can view, modify, recall, and copy them. You can also monitor the status of entered transactions and enter comments for approvers.

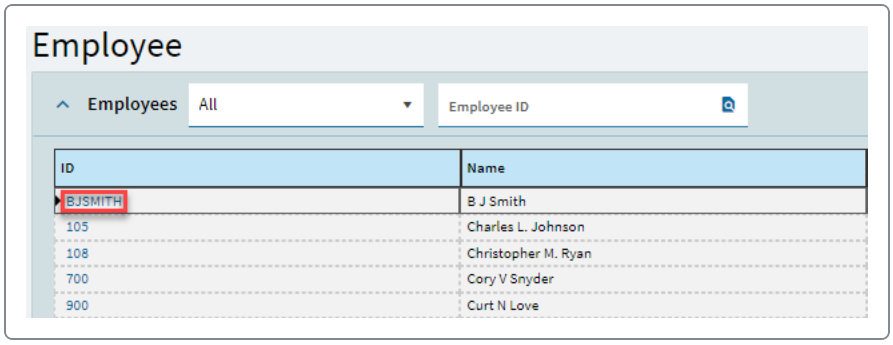
1. Open the **Time Entry** app.
2. To find and select the employee for whom you want to enter expenses, select **Employee**.

   The Employee landing page displays.

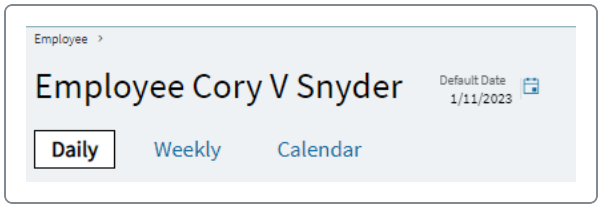


> In this example, we are signed in as Cherles L. Johnson, but want to change it to a different employee.

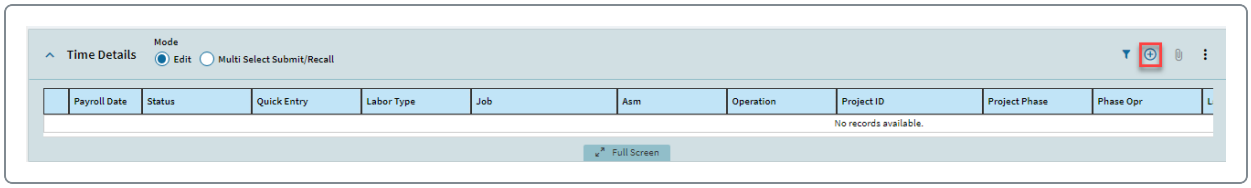
3. Inside the grid, select an employee you want to enter time for by selecting the ID link located in each grid line.



   You can now report time based on your selected employee. In this example, we selected Cory V Snyder.

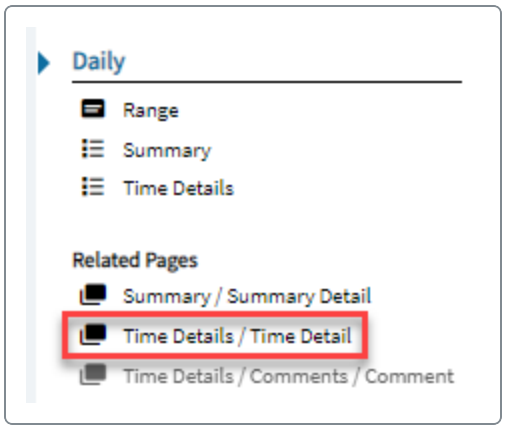


4. Scroll down to locate the Time Details card and select **New Time Detail**.

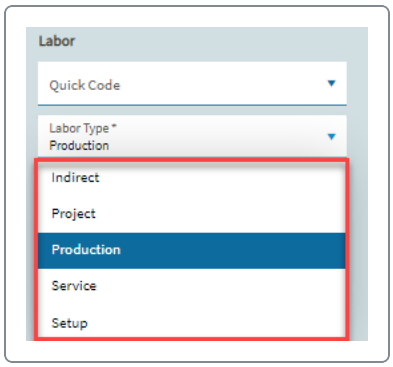


5. In the Nav tree, select the **Time Detail** node.

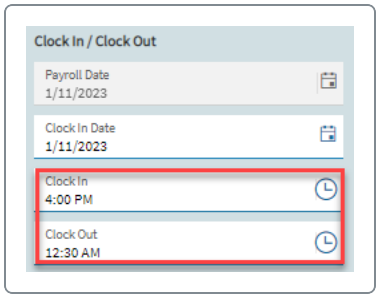
   The Detail card displays.



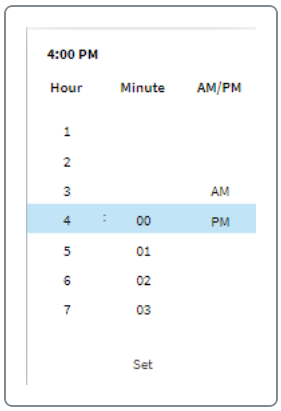
6. From the **Labor Type** drop-down list, select the type of labor performed. The labor type determines which fields are available for entry in the card, and default values populate some of the fields.



7. In the Clock In/Clock Out group box, define the time the employee performed the labor.

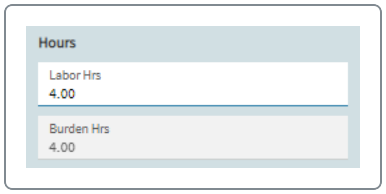


When you select the 'Clock' icon in the 'Clock In' and 'Clock Out' fields, Kinetic displays the 'Time' box, where you can select the time you clocked in or clocked out.



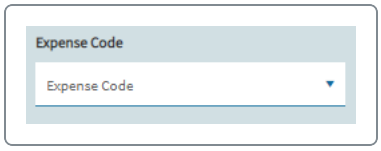
To select your time, scroll up and down in the 'Hour', 'Minute', and 'AM/PM' columns. Once you are happy with your time selection, select **Set** inside the 'Time Box'.

Based on your time selection, the 'Labor' and 'Burden Hours' fields display a time value.

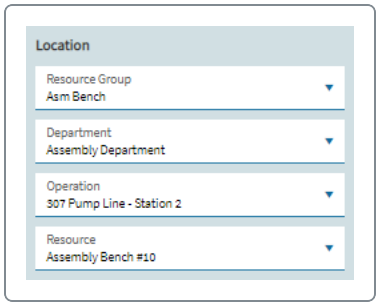


In this example, we selected the 'Clock In' time of '4:00 PM' and 'Clock Out' time of '8:30 PM'. Therefore, the fields show '4' hours.

8. Select one of the existing expense codes for the labor performed.



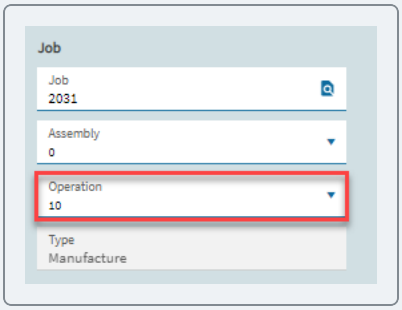
9. In the **Location** section, complete the fields as needed to define the default resource group, department information, and resource for this time transaction.



The fields located in the 'Location' group box activate depending on the value you select in the 'Labor Type' field. I this example, we selected 'Production' and are reporting labor again a job.

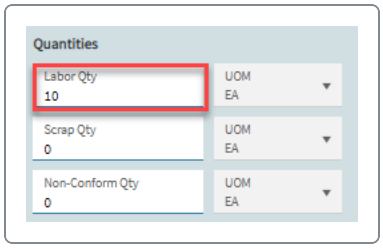
The values will default if you select the 'Operation' sequence. This is if you are reporting time against a job operation (Production).

The 'Operation' field identifies the sequence of the operation record within the specific Job/Assembly to which this labor transaction applies. For setup and production entries, this must be valid and must not be a subcontract operation.



10. Enter the total reported production quantity using the Labor Qty field.

Users can enter quantity in this field except for the last operation of a job with co-parts.



You can also enter the 'Scrap' and 'Non-Conformance' quantity. The 'Scrap' quantity is the quantity you dispose of during production. The 'Non-Conformance' is the discrepant quantity

that you decide to report because there is something wrong with the produced products. Non-Conformance quantity will need to go through inspection to determine whether the quantity can be scrapped, reworked, or can be accepted as is.

11. Select the **Downtime** button to report downtime against a job, with a reason why production stopped, for example: electricity outage, waiting for materials, and so on.

    Downtime is used when the resource is in production and something interrupts that production and the resource is down requiring immediate attention. This is different from indirect codes which are used to track non-production time for a variety of reasons.

    For example, you start production activity on job '1111' but the machine runs out of material and you are waiting for material to continue. Instead of clocking out of the job, you report downtime by selecting an appropriate indirect code. When the downtime button is selected in MES the program suspends time to any job(s) the employee is currently clocked into and starts accruing time to the selected downtime code. When whatever condition that caused the downtime is resolved the employee ends downtime and time again will start to accrue to the job(s).

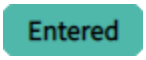
12. Select other fields as necessary.

    - **Project ID** - The project you are reporting time against.
    - **Project Phase** - The project phase belonging to the project you are reporting the time against.
    - **Expense Code** - The expense code associated with the labor transaction.
    - **Capability** - Specifies a capability. A capability is a skill or ability that a resource can possess. For example, a machine resource can have a Shear capability or a human resource can have an Engineer capability. Other typical capabilities include Turn, Set, Paint, Drill, and so on. Capabilities support the concept of manufacturing cells, collections of resources that act as independent production units within your manufacturing center. When you link resources together through a capability, the scheduling engine can schedule operations using these different cells.
    - **Setup % Complete** - Percentage of the completed operation setup.
    - **User Rate** - The labor rate that overrides the system defined labor rate.

- **Payroll** - The payroll hours of the employee that is reporting the time.
- **Call** - The service call associated with the service record.
- **Rework Reason** - The reason code used to describe the rework reason. This code links the transaction to the reason master record.
- **Scrap Reason** - The reason code used to describe the scrap quantity reason. This code indicates why the scrap occurred for analysis purposes.
- **Discrepant Reason** - The reason code used to describe the discrepant quantity reason. This code indicates the reason for the non-conformance.
- **Attribute Set** - Attribute sets allow you to you to use different dimensions (attribute sets) for the same part and then reuse those attribute sets depending on the dimension you want to quote, order, purchase, manufacture, ship, receive, transfer, quantity adjust, and so on.

  To learn about attribute sets, review the Understanding Attribute Sets article.

Select **Save**. 

The transaction is saved with a status of 

until you submit it for approval. You can change the time entry until you submit it.

Use the **Co-Parts** card to enter labor against a job producing multiple parts. Available if the Advanced Production module is installed, use the grid on this card to enter the quantities produced for the various parts manufactured on the current job.

You can enter Co-Parts (multiple parts) manufactured through the current job. For example, a manufacturer makes upholstered office chairs. They manufacture several different sized chair backs which use the same fabric. In this scenario, you can enter a single job that creates two different parts on one job operation (stamping the material into two different sizes).

For more information about co-parts, review the Entering Co-Parts in Job Entry article.

Use the **Labor Equipment** card to enter meter readings for equipment when entering time for a job associated with the equipment.

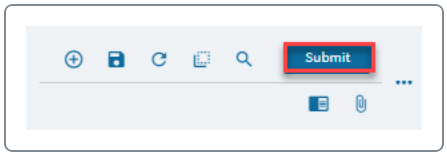
This card is available when a resource is associated with the equipment used for the job, and the equipment requires the tracking of meter readings for maintenance.

After you enter time against a job in the Daily Time > Details card, you can use the Labor Equipment card and enter meter readings for the equipment. Default values may populate the fields depending on the setup of the equipment in Equipment Maintenance.

Submitting Time

After you enter and save a time transaction, you submit it for approval. If a previously submitted transaction was rejected by approvers, you can change it and re-submit it for approval.

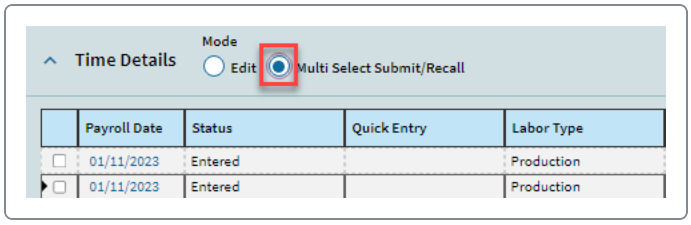
1. If you want to submit an individual time right after you enter it, select **Submit**.



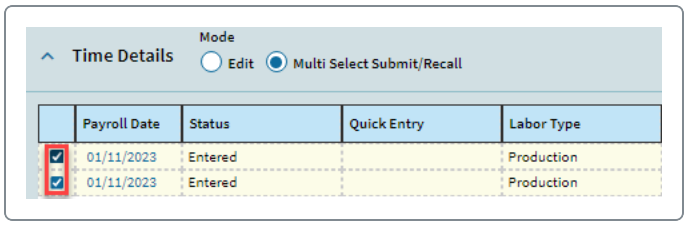
2. If you need to see all the time transaction you want to submit, select the **Time Details** node in the Nav tree.

   The Time Details card displays.

3. In the **Time Details** card, switch to the **Multi Select Submit/Recall** mode.

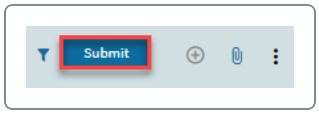


4. Select the time transaction you want to submit by selecting the check box on each expense line.



This example uses an example of '2' time transactions.

5. Select **Submit**.



Transaction(s) are now submitted. The transaction is submitted for approval and the status is set to Approved. You can review the approval details in the **Approvals** card.

Recalling Time

You can recall a time transaction if you unintentionally submitted it for approval.

> You can also recall a previously approved or rejected time transaction if the **Capture WIP** has not been executed.

1. In the **Time Details** card, switch to the **Multi Select Submit/Recall** mode.
2. Select the time transaction you want to recall.
3. Select the **Recall** button.

   The transaction is recalled and the status changes to Entered.

Retrieving Time Records

By default, all transactions of all statuses display in the **Time Details** card. To exclude a transaction of a specific status from displaying, use the **Retrieve Options** action available in the Overflow ••• menu.

Status filter options include the following:

- **Retrieve Approved Records** - retrieves transactions with a status of Approved
- **Retrieve Partially Approved Records** - retrieves transactions with a status of Partially Approved
- **Retrieve Entered Records** - retrieves transactions with a status of Entered
- **Retrieve Reject Records** - retrieves transactions with a status of Rejected
- **Retrieve Submitted Records** - retrieves transactions with a status of Submitted
- **Retrieve Records By** - retrieves transactions by day, week, or month.

Calendar View

The **Calendar** page displays your time entries for review by 'day', 'week', or 'month'. You can also use the Calendar to enter time.

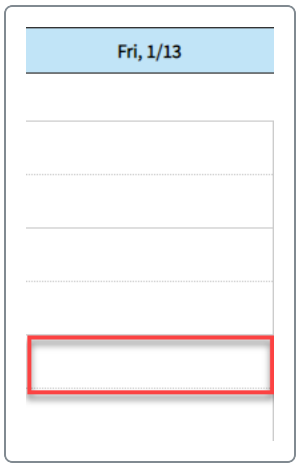
The date and day of the week is shown at the top of the page and the time of day displays down the left margin, just like a desk calendar or a day timer book. Any time that has been entered, submitted, rejected, or approved for this day will show in color-coded blocks.

1. Select the **Calendar** page.

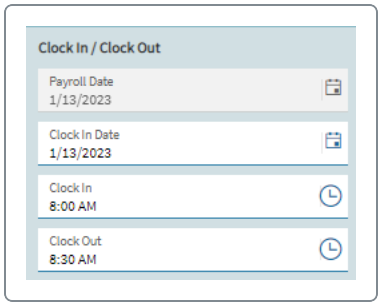
2. Inside the **Calendar** page, review the time transaction based on a particular day, week, or month.

3. To enter time for a particular day, double click inside the calendar on the day you want to enter the time for.

   For example, in this example we double click on date 1/13 and time 8:00 AM.



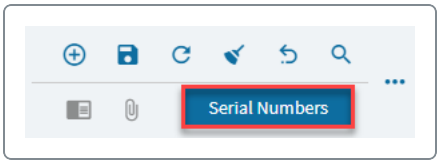
   The **Detail** card displays. The card displays the selected clock in and clock out values. in this case, 8:00 AM through to 8:30 AM.



To complete the transaction, you must define all the values on this card and save and submit it.

Working with Serial Numbers

If the part on your job is a serial number tracked item, then you must provide serial numbers against the reported quantity by using the **Serial Numbers** button.



You can also add serial numbers against the 'Scrap' and 'Non-Conformance' quantity.

Assume we are manufacturing 'Part A'. The part is set to 'Serial Tracking' in the 'Part' app and a job is for '10' pieces. To keep it simple, the job holds a single operation and no material. When we enter time, we report the following quantities:

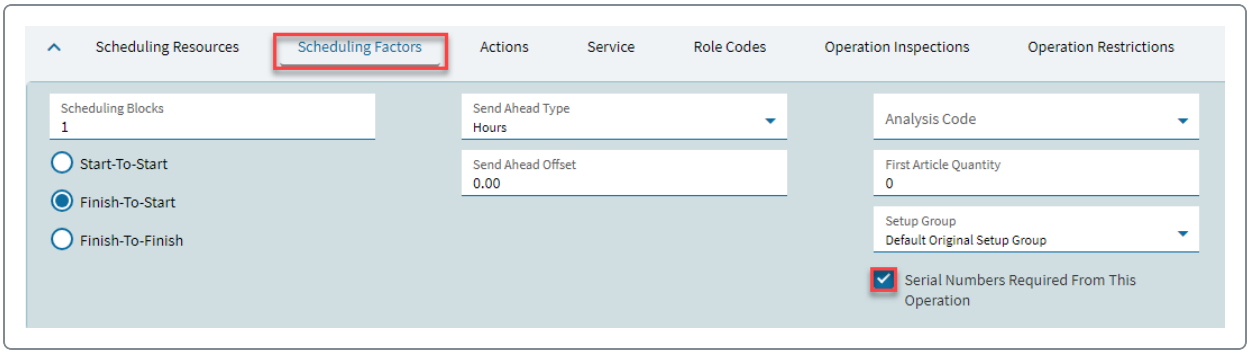
a. Labor Quantity - 6

b. Scrap Quantity - 2

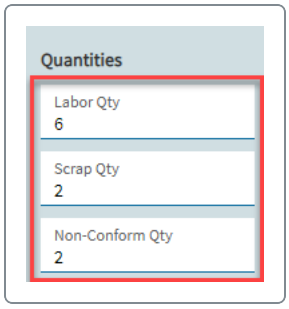
c. Non-Conformance - 2

Next, we assign serial numbers to each reported quantity.

For the 'Serial Numbers' button to display, you must select the 'Serial Numbers Required From This Operation' check box on a job operation when you define a method of manufacture in the 'Job' app. Or, if you use 'Get Details' to pull the method of manufacture into your job. In this case, the method is created in the 'Engineering Workbench' app.

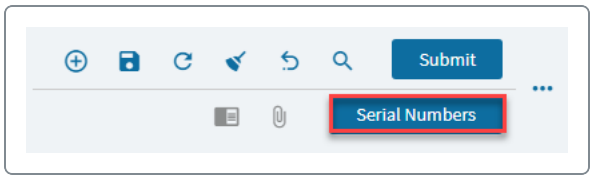


1. We enter time against a job operation as follows:

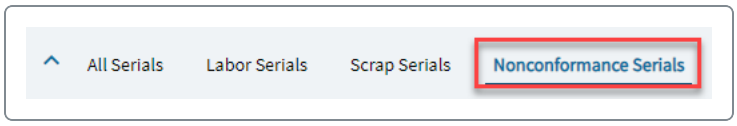


2. Next, we select the **Serial Numbers** button.

   The **Serial Number Selection** panel opens.

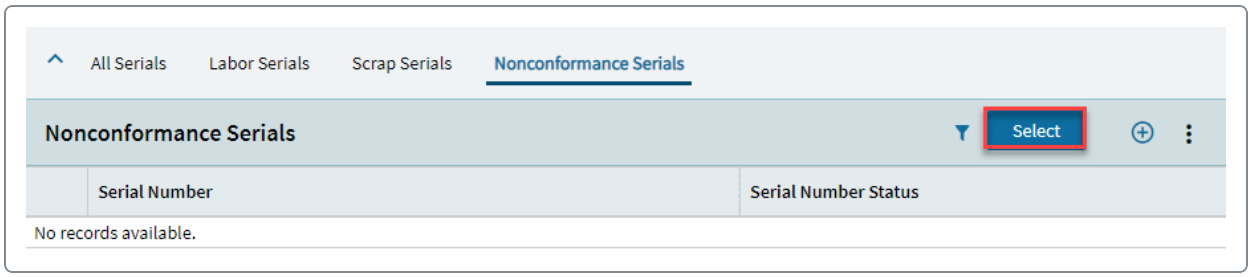


3. Inside the panel, we select the **Nonconformance Serials** tab.

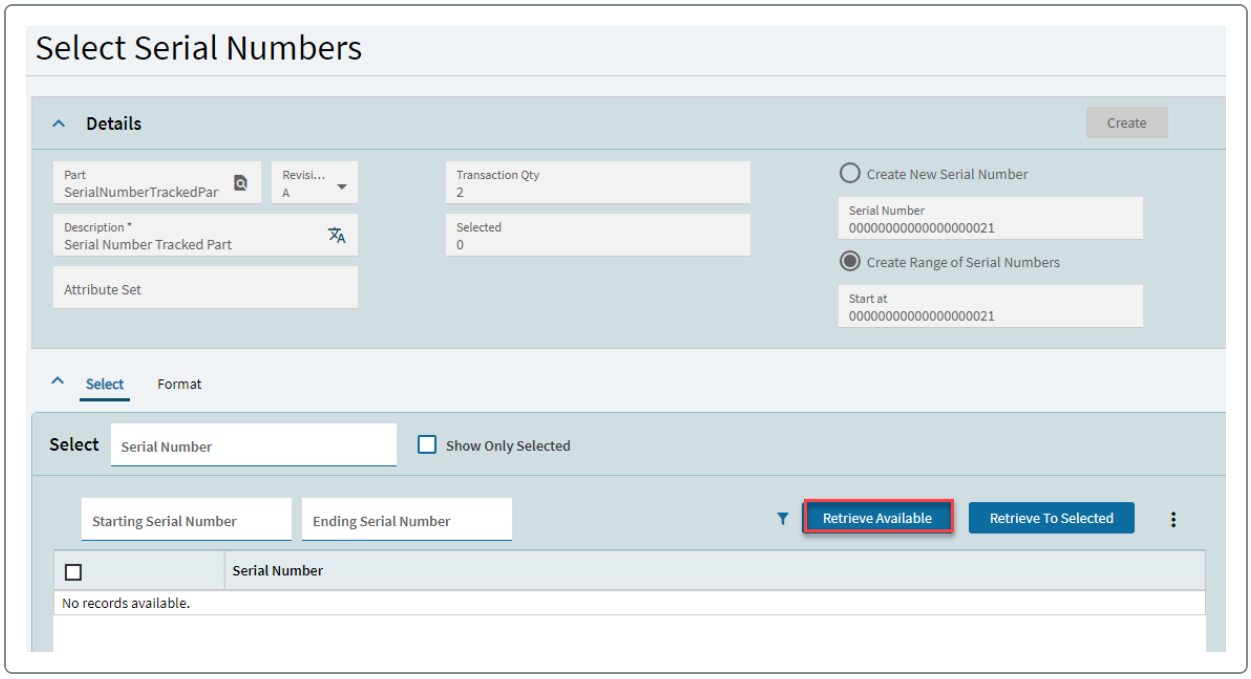


4. Select the **Select** button.

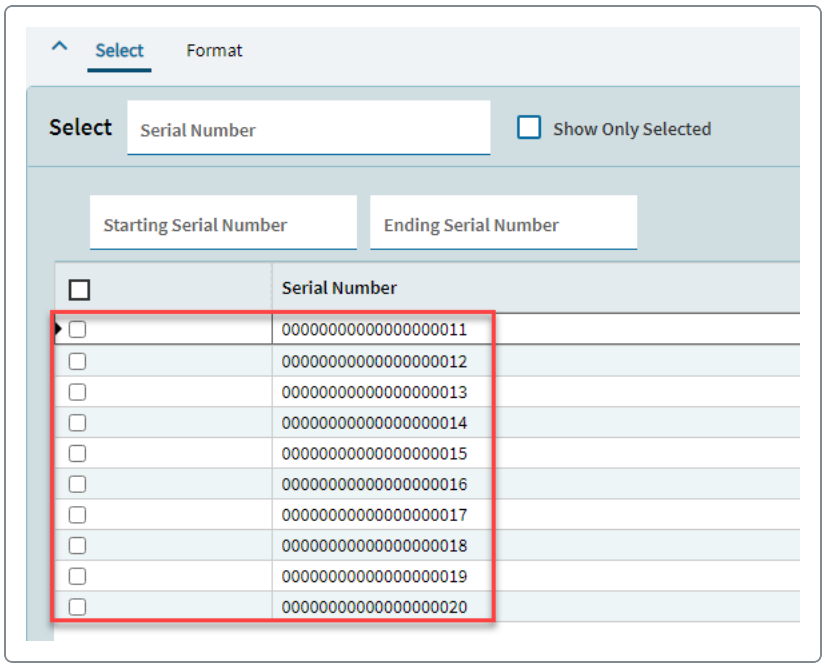
   The **Select Serial Numbers** panel opens.



5. Inside the panel, we select the **Retrieve Available** button.

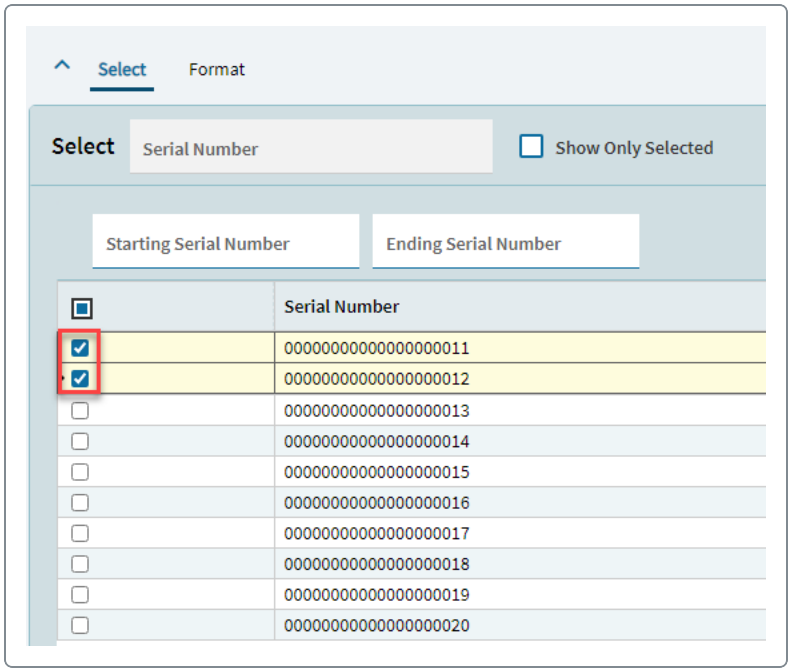


The serial numbers populate.



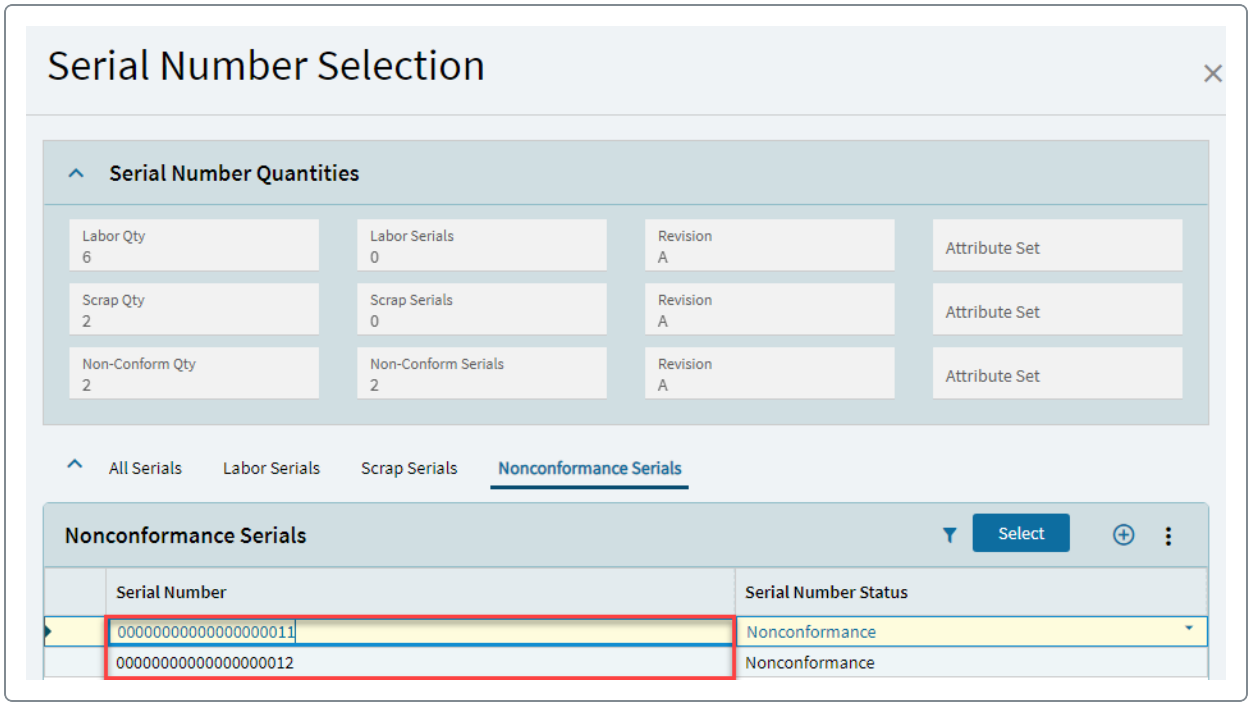
In this case, the app displays '10' serial numbers since the job quantity is for '10' pieces.

6. Next, we select **2** serial numbers. Remember, we reported **2** non-conformance units.

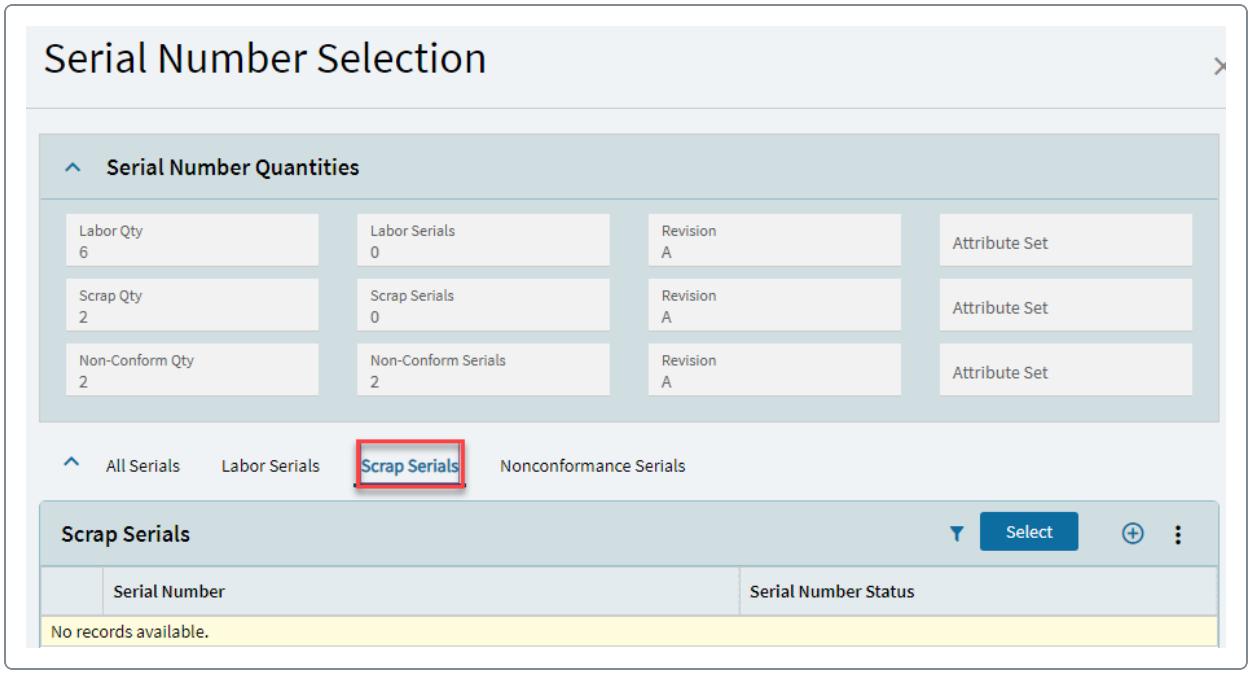


7. Inside the panel, we select **Ok**.

   The selected serial numbers display on the **Nonconformance Serials** card with the **Nonconformance** status.

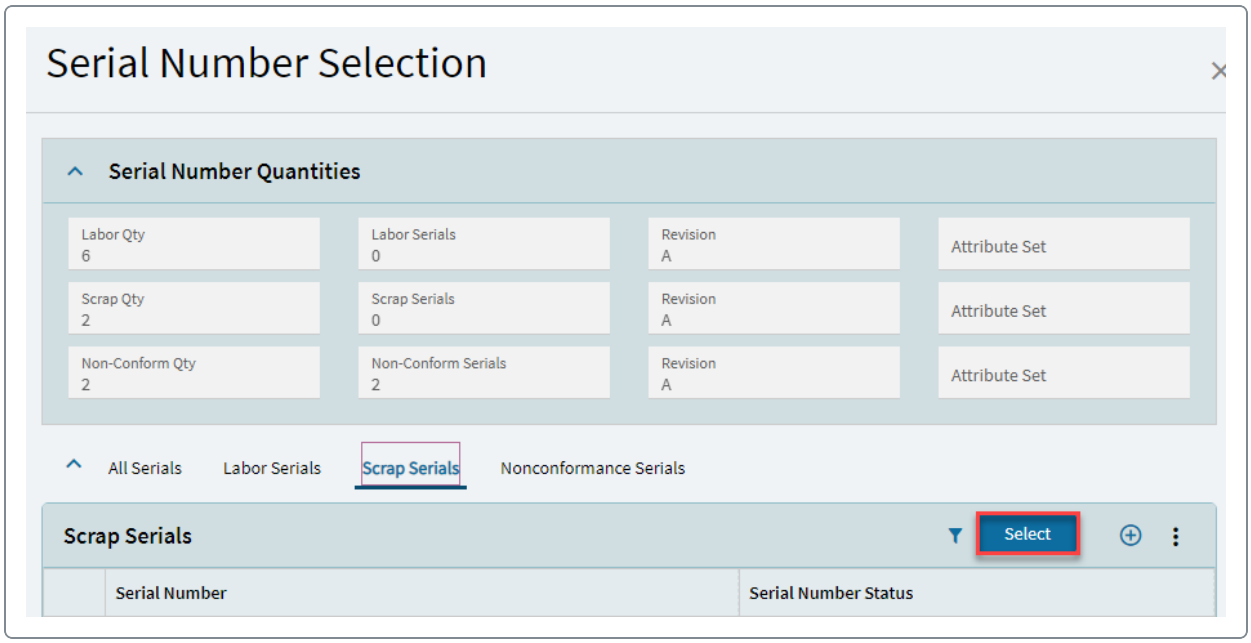


8. Next, we select the **Scrap Serials** tab.



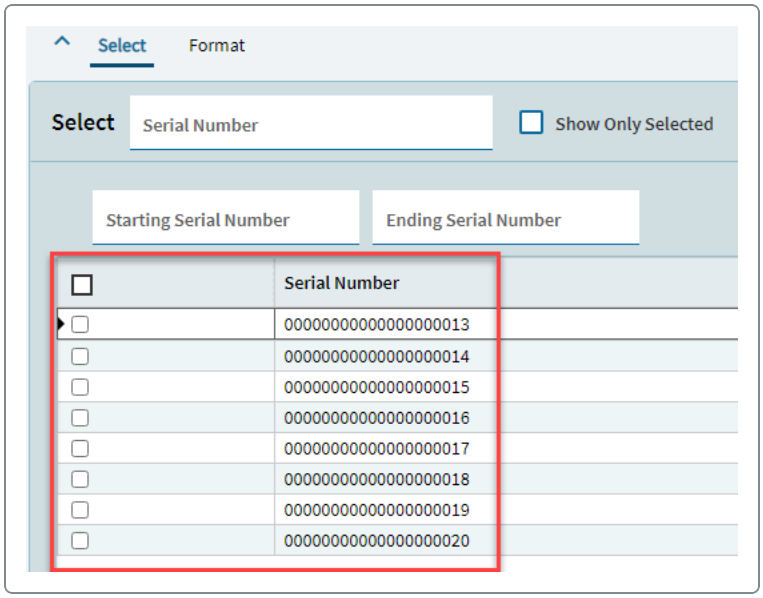
9. Select the **Select** button.

   The **Select Serial Numbers** panel opens.



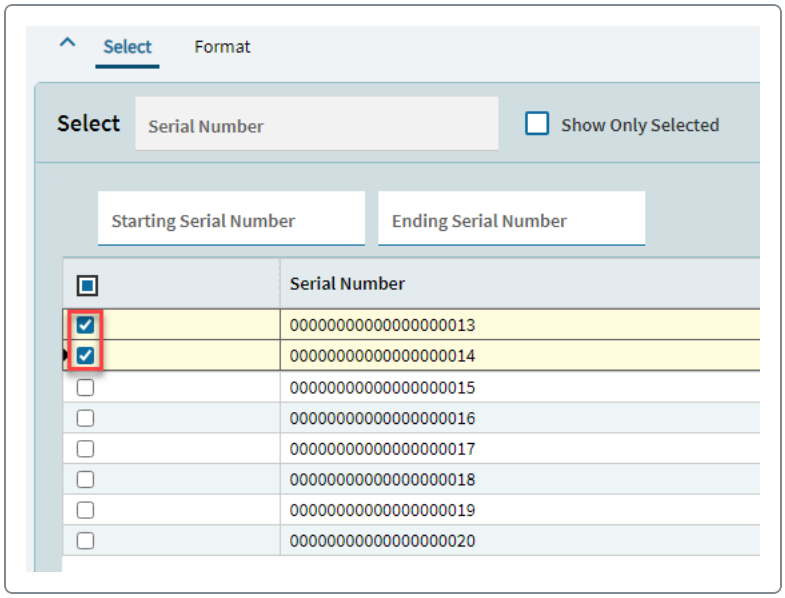
10. Inside the panel, we select the **Retrieve Available** button.

The serial numbers populate.



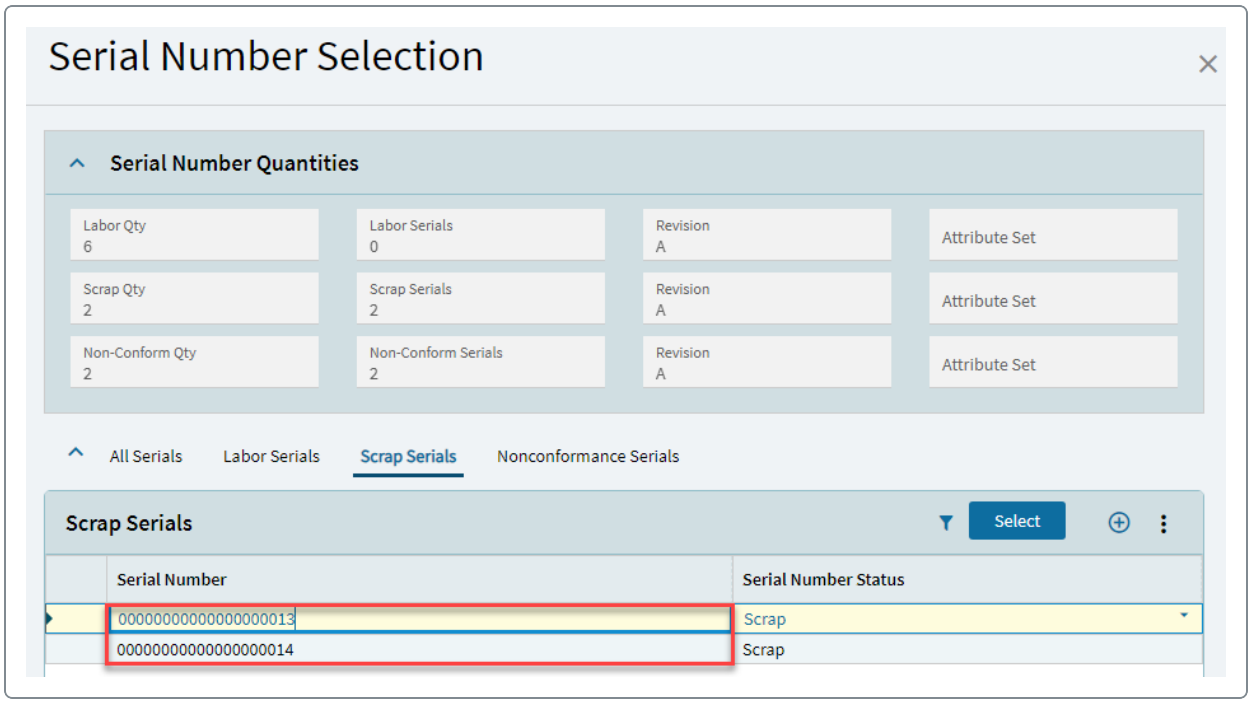
Notice only '8' serial numbers display. This is because we assigned '2' for non-conformance already.

11. Next, we select **2** serial numbers.

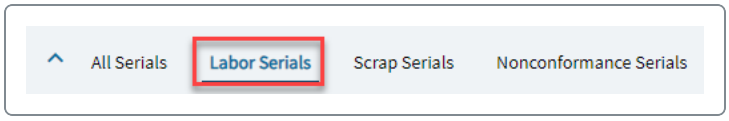


12. Inside the panel, select **Ok**.

    The selected serial numbers display on the **Scrap Serials** card with the **Scrap** status.

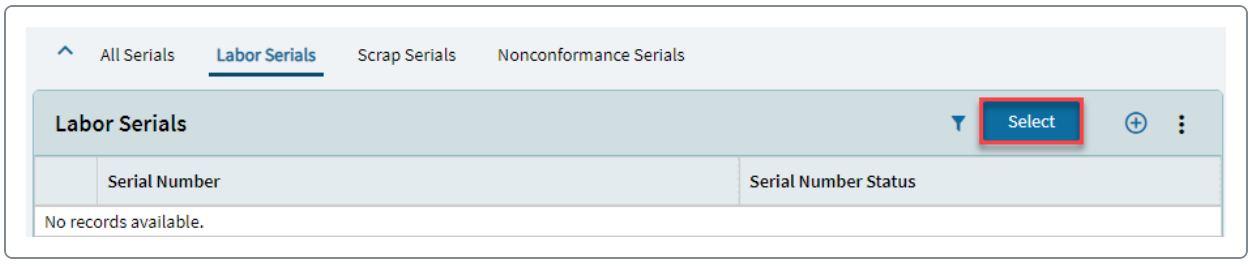


13. Next, we select the **Labor Serials** tab.

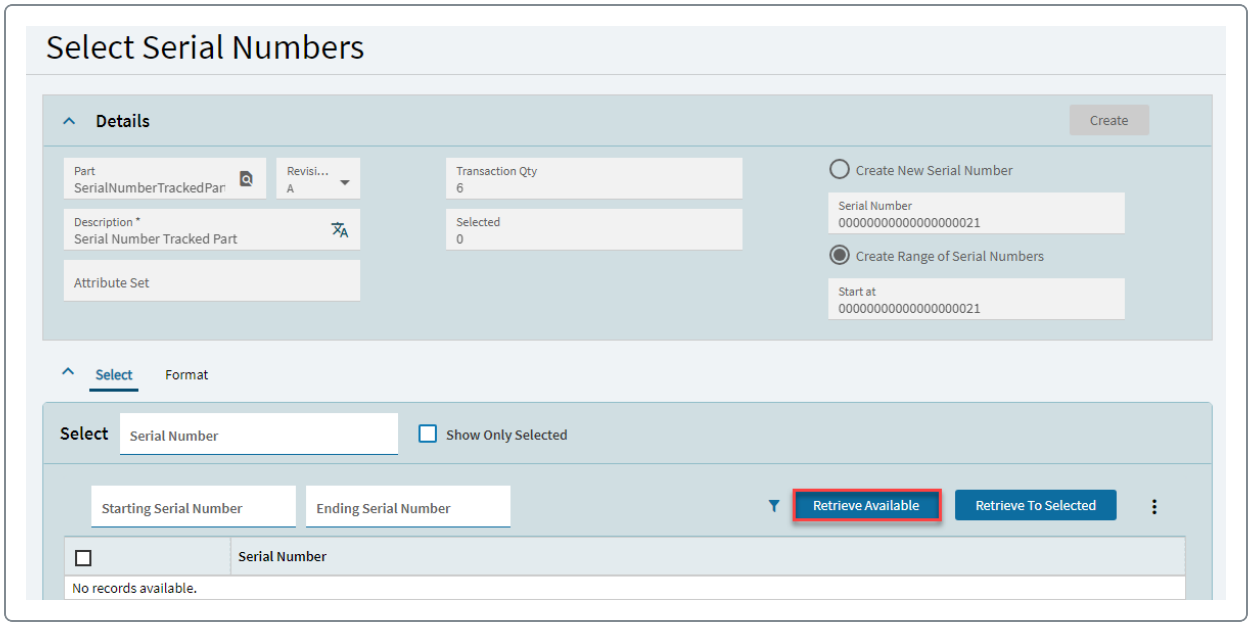


14. Select the **Select** button.

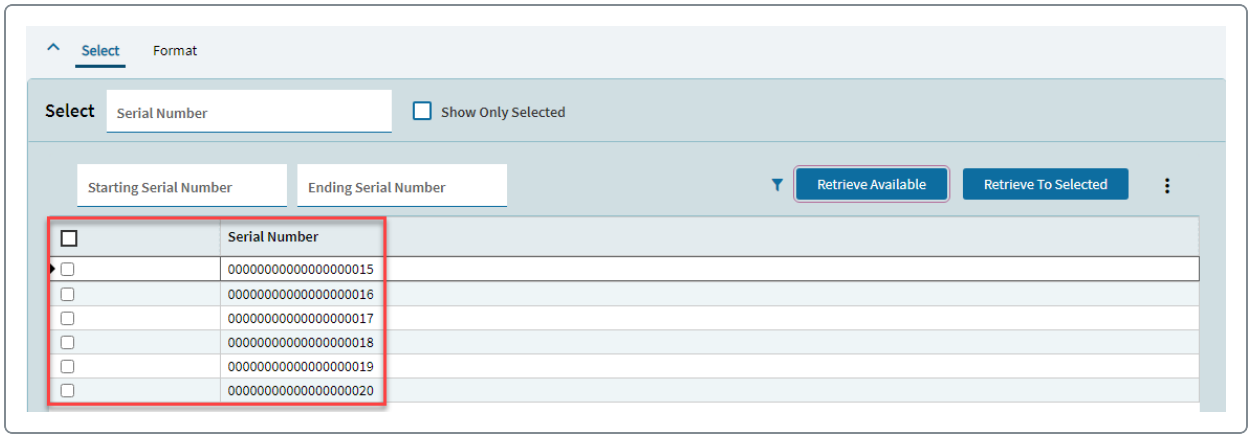
    The **Select Serial Numbers** panel opens.



15. Inside the panel, we select the **Retrieve Available** button.

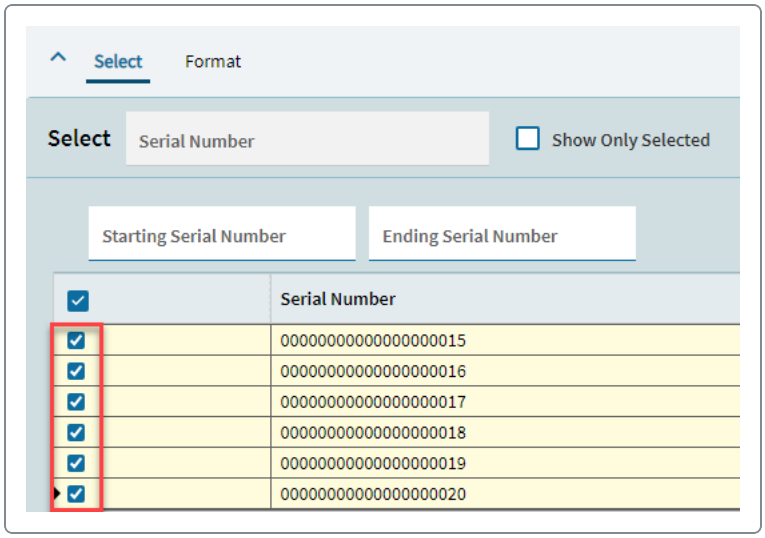


The serial numbers populate.



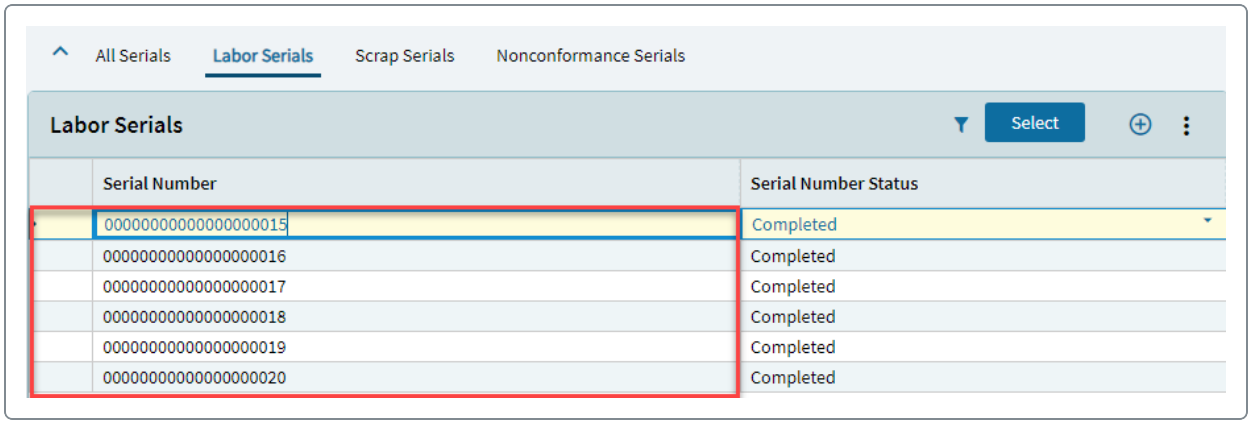
Notice only '6' serial numbers display. This is because we assigned '2' for non-conformance and '2' for scrap already.

16. Next, we select all **6** serial numbers.

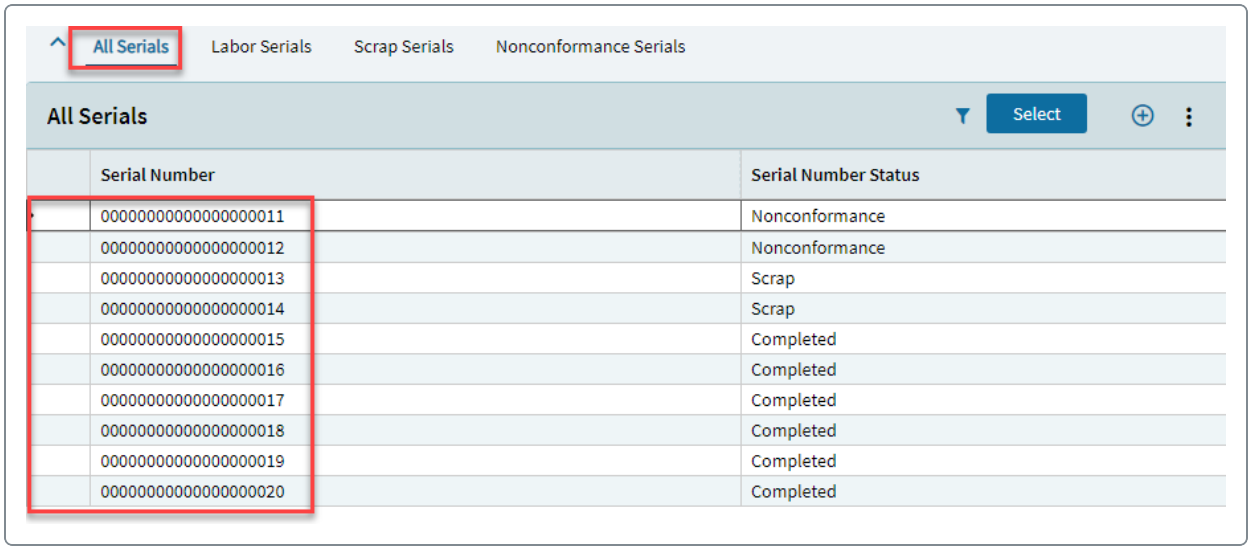


17. Inside the panel, select **Ok**.

    The selected serial numbers display on the **Labor Serials** card with the **Completed** status.

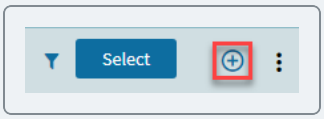


18. Next, we select the **All Serials** tab.



The card displays all the assigned serial numbers with respective statuses. In this case, **Nonconformance**, **Scrap**, and **Completed**.

If your want to add a new serial number, select new on the **Nonconformance Serials**, **Scrap Serials**, **Labor Serials**, and **All Serials** cards.



Completing and Closing Jobs

You can complete and close jobs using the **Job Completion/Closing Maintenance** app. Once you close a job, you can close it in all the financial modules.

So when do you complete and close a job? You complete a job when you finish production and report all the quantity and labor against it. When you complete a job, it removes all the remaining shop load and material requirements. Once you complete a job, you can proceed to close it. You close a job when you receive all the costs against it. The accounting department typically closes the job after auditing the financial transactions. This will prevent you from using the job in any transactions or adjustments. Remember, you must first complete a job before you can close it. Any job that you complete in Kinetic becomes a candidate for closing.

You can also automate the job completion and closing in Kinetic using the **Auto Job Closing** and **Auto Job Completion** apps. In such cases, Kinetic automatically closes any jobs that fall within the thresholds you specify on 'closing' and 'completion' codes. Any jobs that fall outside these thresholds fail to close or complete. To learn about how to create and assign those codes, review the Creating Closing and Completion Codes for Jobs article.

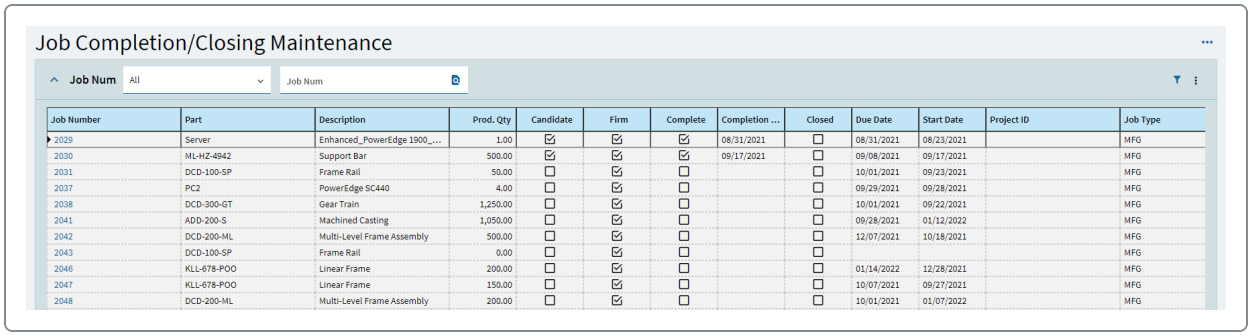
Reviewing Job Details

1. Open the **Job Closing** app.

   The **Details** card displays

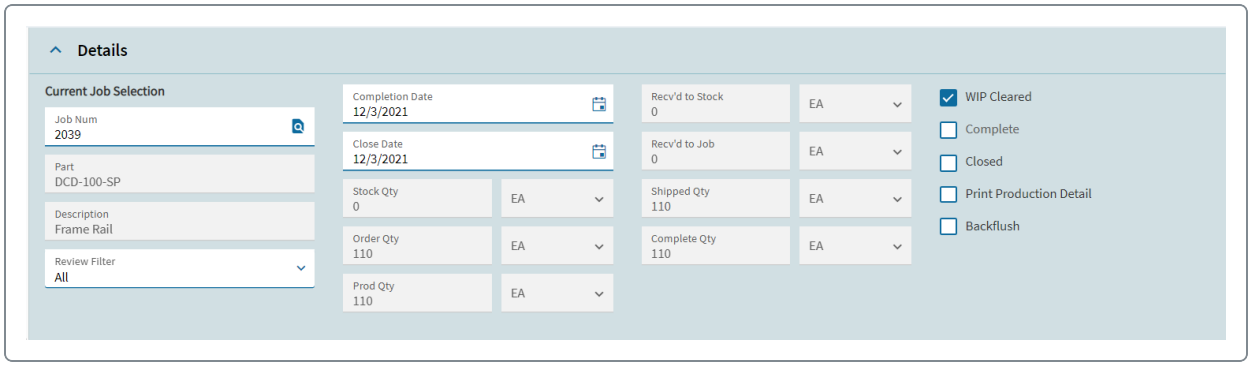
   > The grid on the Landing page displays what jobs have been completed and therefore are good candidates for closing. You can select a job inside the grid by clicking a job link located in the **Job Number** column. You can also search for and select the job you need by using the **Job Num** field.

   > You can select any job, depending on whether you want to complete or close it.



Job Number	Part	Description	Prod. Qty	Candidate	Firm	Complete	Completion ...	Closed	Due Date	Start Date	Project ID	Job Type
2029	Server	Enhanced_PowerEdge 1900_...	1.00	☑	☑	☑	08/31/2021	☐	08/31/2021	08/23/2021		MFG
2030	ML-HZ-4942	Support Bar	500.00	☑	☑	☑	09/17/2021	☐	09/08/2021	09/17/2021		MFG
2031	DCD-100-SP	Frame Rail	50.00	☐	☑	☐		☐	10/01/2021	09/23/2021		MFG
2037	PC2	PowerEdge SC440	4.00	☐	☑	☐		☐	09/29/2021	09/28/2021		MFG
2038	DCD-300-GT	Gear Train	1,250.00	☐	☑	☐		☐	10/01/2021	09/22/2021		MFG
2041	ADD-200-S	Machined Casting	1,050.00	☐	☑	☐		☐	09/28/2021	01/12/2022		MFG
2042	DCD-200-ML	Multi-Level Frame Assembly	500.00	☐	☑	☐		☐	12/07/2021	10/18/2021		MFG
2043	DCD-100-SP	Frame Rail	0.00	☐	☑	☐		☐				MFG
2046	KLL-678-POO	Linear Frame	200.00	☐	☑	☐		☐	01/14/2022	12/28/2021		MFG
2047	KLL-678-POO	Linear Frame	150.00	☐	☑	☐		☐	10/07/2021	09/27/2021		MFG
2048	DCD-200-ML	Multi-Level Frame Assembly	200.00	☐	☑	☐		☐	10/01/2021	01/07/2022		MFG

2. Using the **Details** card, review the job details in the **Current Job Selection** group box.

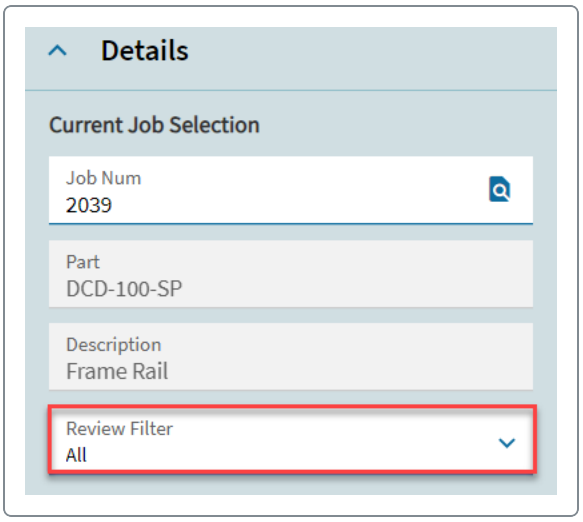


For example, we selected job '2039' for '110' units of part 'DCD-100-SP' that we are producing for a sales order (Make Direct). We need to complete and close the job.

In this case, the 'Shipped Qty' field displays the value of '110' pieces and the 'Received to Job' and 'Received to Stock' fields display '0'. This is because of the demand link the job holds. Assume, your job holds the 'Make To Stock' demand link, since you need to make '110' pieces for your inventory. Once you make the items and received them to stock, the 'Received to Stock' field would display the value of '110' while the 'Received to Job' and 'Shipped Qty' fields would display '0'.

To learn more about the demand links, review the Creating Jobs article. Inside the article, scroll down to locate the 'Entering Demand Links' topic.

3. Use the **Review Filter** field to control how Kinetic displays operations and materials in the respective cards for the current job.

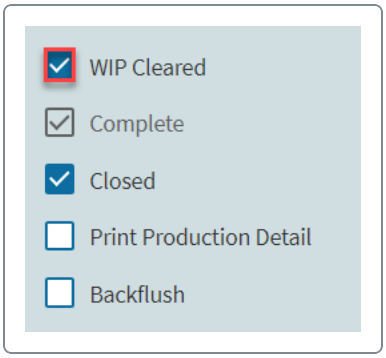


To make sure you do not complete or close a job before it is ready, review these operation and material listings. You must post all material, subcontract and labor costs before you close any job. The options include:

- **All** - This check box indicates that the system displays all the job's operations and materials in the material and operation panel cards. The system sorts in order by assembly.
- **Exceptions** - Only operations and materials that are not complete display in the material and operation panel cards.

4. The **WIP Cleared** check box indicates the job is no longer in the work-in-progress (WIP) calculations.

   You can manually clear this check box. However, if this check box is cleared by default, you cannot select it.

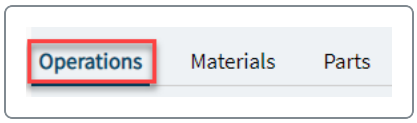


Reviewing Operations and Materials

Next, review the job's bill of operations and bill of materials.

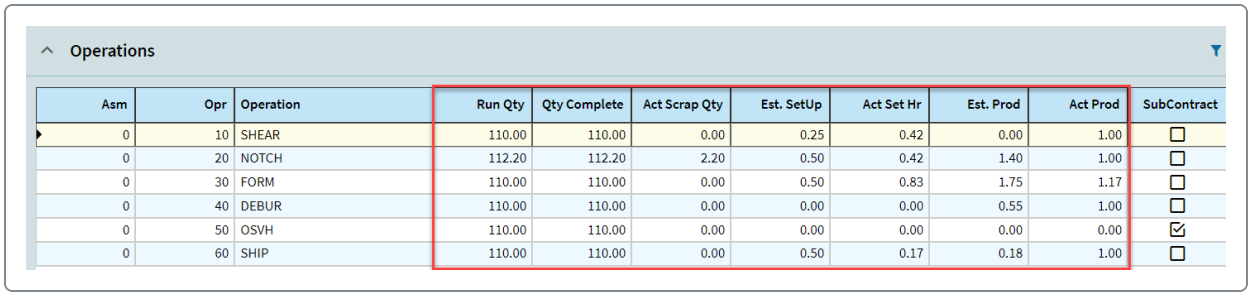
1. Select **Operations**.

   The **Operations** card displays.



2. On the **Operations** card, review the operation details.

   The card displays all the operations performed during this job.



Asm	Opr	Operation	Run Qty	Qty Complete	Act Scrap Qty	Est. SetUp	Act Set Hr	Est. Prod	Act Prod	SubContract
0	10	SHEAR	110.00	110.00	0.00	0.25	0.42	0.00	1.00	☐
0	20	NOTCH	112.20	112.20	2.20	0.50	0.42	1.40	1.00	☐
0	30	FORM	110.00	110.00	0.00	0.50	0.83	1.75	1.17	☐
0	40	DEBUR	110.00	110.00	0.00	0.00	0.00	0.55	1.00	☐
0	50	OSVH	110.00	110.00	0.00	0.00	0.00	0.00	0.00	☑
0	60	SHIP	110.00	110.00	0.00	0.50	0.17	0.18	1.00	☐

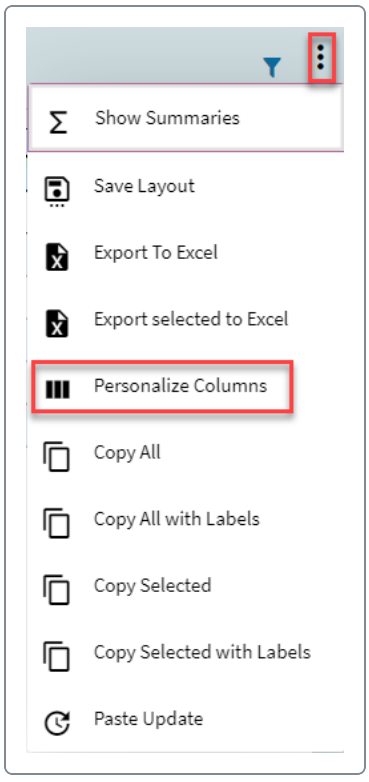
In this example, the job includes '6' operations. Notice operation '20' includes some scrap quantity. Each operation includes the 'Estimated' and 'Actual' setup and production time values.

Personalize Columns

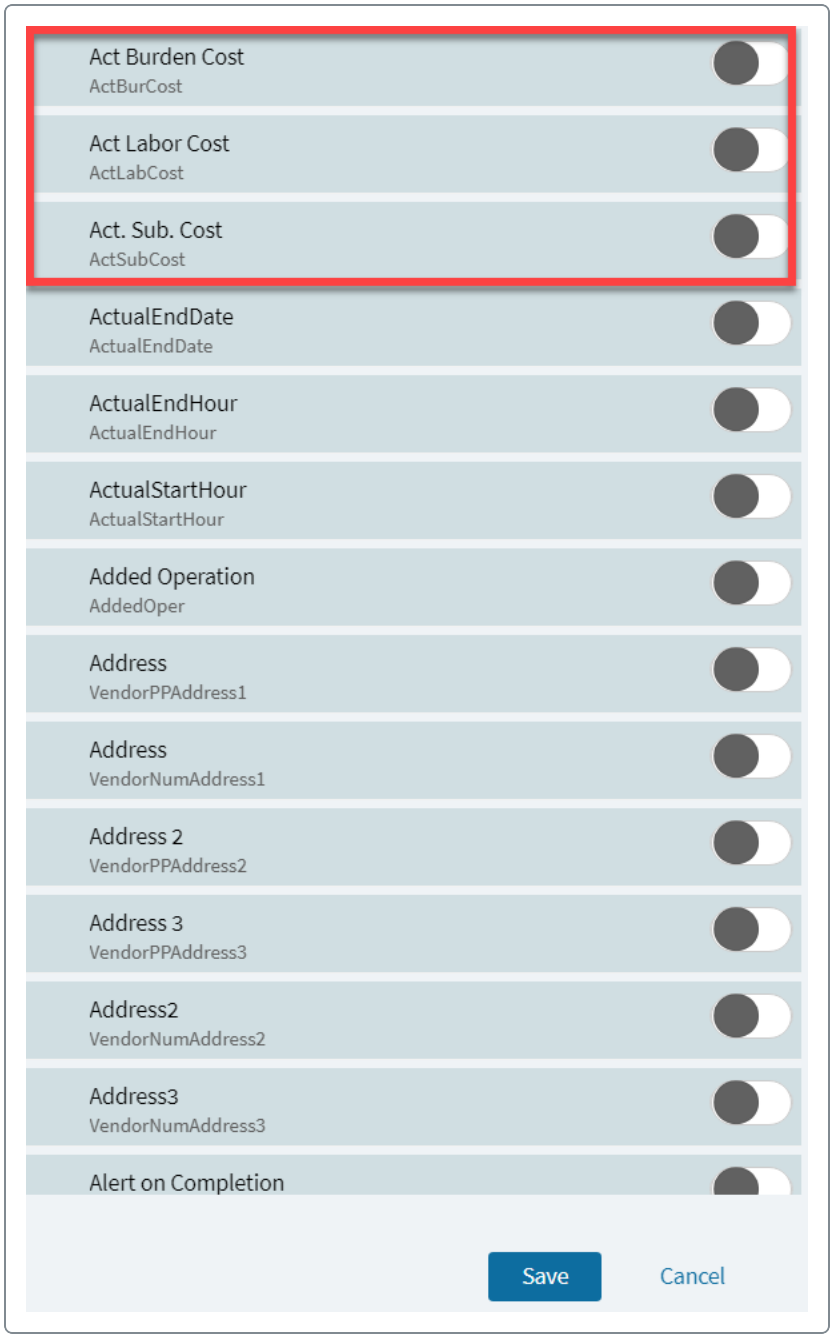
The columns on the card can display 'Burden', 'Labor', and 'Subcontract' costs if you activate the column fields in the app. To do so:

1. From the **Overflow** menu, select **Personalize Columns**.

   The **Personalize Columns** panel opens.



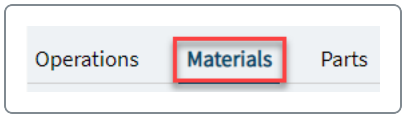
2. Activate **Cost** related fields depending on what cost you want to displays.



3. Finally, select the **Save** button inside the panel.

3. Select **Materials**.

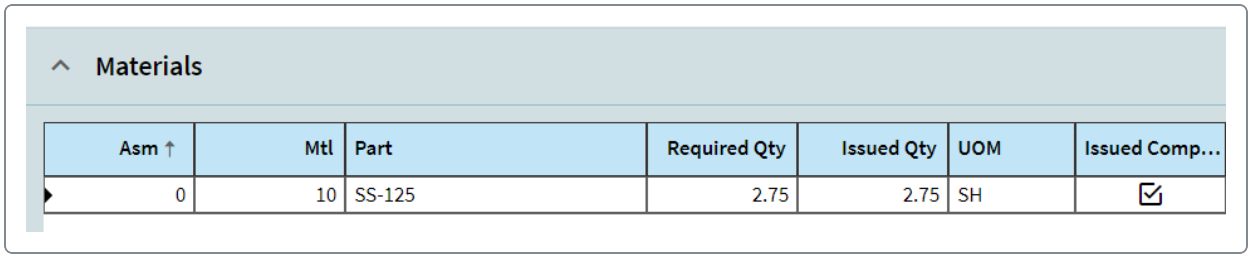
   The Materials card displays.



Again, you can also use the Nav tree to select this card.

4. On the **Materials** card, review the material details.

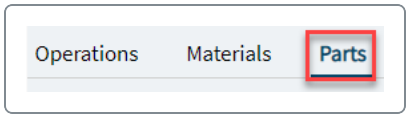
   The card displays all the materials used to manufacture the final part quantity. Use this card to review the materials used on the job.



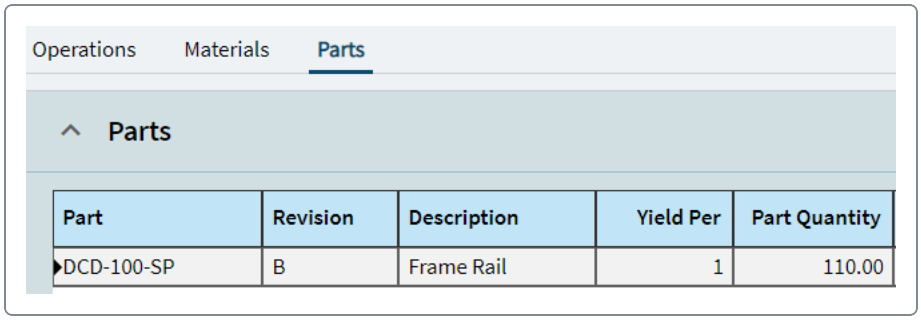
Using this example, the job includes '1' material with the required quantity of '2.75' pieces. The quantity has been issued to the job.

5. Next, select **Parts**.

   The **Parts** card displays.



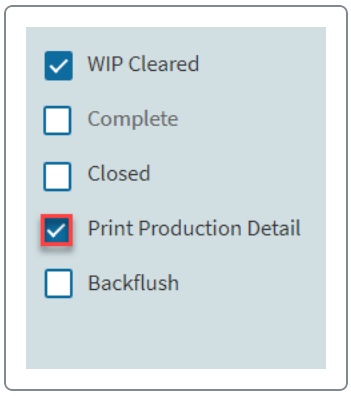
6. On the **Parts** card, review the assembly part manufactured on the job.



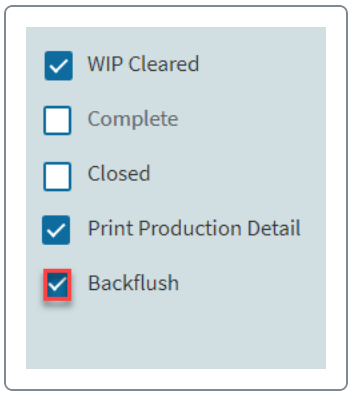
Using this example, the job is for '110' pieces of part 'DCD-100-SP'.

7. Additionally, you can select the **Print Production Detail** check box if you want to print the **Production Detail** report for the current job.

   The report displays all assemblies and cost details. You can print this report only for a closed job.



8. If you want to backflush the materials on the job, select the **Backflush** check box.



About Backflushing

Backflushing is an automatic issuing of material against a job. This check box is only available if you select the 'Complete' check box and if the completed quantity on the job is more than zero.

Warning messages displays before the 'Backflush' process begins. When Kinetic prompts you if you want to run the 'Backflush' process, select 'Yes'. Kinetic also warns you if the 'Complete Quantity' value is less than the planned production quantity. If you choose to continue with the 'Backflush' process, then Kinetic will base the material issue quantity calculations on the 'Complete Quantity'.

Once you backflush a job, all material records are considered 'Issued Complete'. You cannot reverse this process, so make sure you are ready to run this process on the current job.

If you backflush by mistake, you will need to adjust all inventory and job quantities.

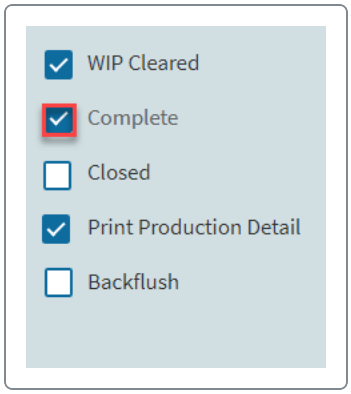
Completing and Closing a Job

Finally, complete and close the job.

1. Once you are ready to end labor on the job, select the **Complete** check box.

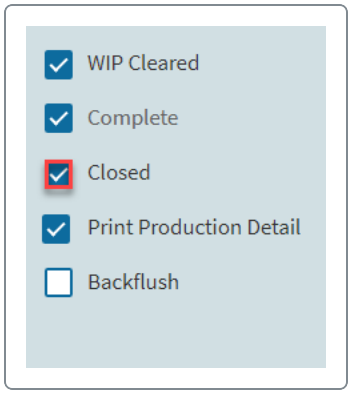
   You can no longer edit the operation and assembly records on the job.

   If inspections are not complete on the part quantity at this time, a warning message displays. You can either select 'Yes' and continue or select 'No' and complete this job after the part quantity passes inspection. You cannot close a job until the quantity passes inspection.

2. If there are no remaining costs left for this job, select the **Closed** check box.

   At this time, you can no longer edit this job using the 'Job Entry' app and you cannot post transactions against it. When you display a closed job within the 'Job Entry' app, you can see its status changed to 'Closed'.

3. Select **Save**. 

Kinetic now considers the job finished. You can no longer place transactions against this job, and Kinetic moves the costs to your financial records. If you complete or close a job by mistake, you can reopen it by clearing the 'Complete' or 'Closed' check boxes. If you do this, you can then make adjustments to it using the 'Job Entry' app.

Running the Auto Job Completion Process

Run the **Auto Job Completion Process**to automatically complete jobs. Any jobs that fall within the thresholds defined on completion codes automatically complete. The jobs that fall outside these thresholds fail to complete. The process saves you time to complete jobs individually.

Jobs that failed to complete display in the **Job Closing Exception Tracker**. Use the tracker to determine why jobs failed to complete. You can open failed jobs in Job Entry or other related programs to correct the generated exceptions.

You create job completion codes using the **Job Complete/Close Code Parameters Maintenance** and link them to product groups using **Product Group Maintenance**.

The **Selection** parameters include:

- **Log** - The name of the audit log file the process creates. The log file saves within the Mfgsysdata/Reports directory on your system's application server. After the Auto Job Complete Process completes, you can review the generated log file to see jobs that did and didn't complete.

  The log lists each job with its criteria set and status. Jobs that failed to complete display the Material, Operation, and Subcontract threshold percentages that caused the failure. For example:

  - Job 01002045 - Criteria Set A100 - Complteted
  - Job 01002051 - Criteria Set C200 - Failed Asm Seq 0 - Opr Seq 50 - Qty 57%
  - Job 01002051 - Criteria Set C200 - Failed Asm Seq 0 - Mtl Seq 20 - Cost 140%
- **Sites** - You can limit the process to only include jobs that are linked to a specific site. If you do not use the Site filter, the process will consider all the jobs. After you select a specific site(s), the Sites field displays whether you filtered using site(s) (Some Selected) or you did not (None Selected).
- **Schedule** - Indicates when you want to run the process. If you select something other than Now, the Recurring check box is available.
- **Recurring** - Select this check box if you want the process to run on a repeating basis. This check box is only available if you select a schedule other than Now.

To run the process:

1. Enter your log name.
2. Select your schedule.
3. Filter by site, as necessary.

4. Depending on what schedule you select, select the **Recurring** check box.
5. Select **Process**. 

Running the Auto Job Closing Process

Run the **Auto Job Closing Process**to automatically close jobs. Any jobs that fall within the thresholds defined on closing codes automatically close. The jobs that fall outside these thresholds fail to close. The process saves you time to close jobs individually.

Jobs that failed to close display in the **Job Closing Exception Tracker**. Use the tracker to determine why jobs did not close. You can open failed jobs in Job Entry or other related programs to correct the generated exceptions.

You create job closing codes using the **Job Complete/Close Code Parameters Maintenance** and link them to product groups using **Product Group Maintenance**.

The **Selection** parameters include:

- **Log** - The name of the audit log file the process creates. The log file saves within the Mfgsysdata/Reports directory on your system's application server. After the Auto Job Closing Process completes, you can review the generated log file to see jobs that did and didn't close.

  The log lists each job with its criteria set and status. Jobs that failed to close display the Material, Operation, and Subcontract threshold percentages that caused the failure. For example:

  - Job 01002045 - Criteria Set A100 - Closed
  - Job 01002051 - Criteria Set C200 - Failed Asm Seq 0 - Opr Seq 50 - Qty 57%
  - Job 01002051 - Criteria Set C200 - Failed Asm Seq 0 - Mtl Seq 20 - Cost 140%
- **Sites** - You can limit the process to only include jobs that are linked to a specific site. If you do not use the Site filter, the process will consider all the jobs. After you select a specific site(s), the Sites field displays whether you filtered using site(s) (Some Selected) or you did not (None Selected).
- **Schedule** - Indicates when you want to run the process. If you select something other than Now, the Recurring check box is available.
- **Recurring** - Select this check box if you want the process to run on a repeating basis. This check box is only available if you select the schedule other than Now.

To run the process:

1. Enter your log name.
2. Select your schedule.
3. Filter by site, as necessary.
4. Depending on what schedule you select, select the **Recurring** check box.
5. Select **Process**.

Reports

This section describes some of the key Job Management reports. You can run these reports whenever you need. You can also set up each report to generate and print through a recurring, automatic schedule.

Generating the Job Traveler Report

Run the **Job Traveler Report**to track manufacturing progress of jobs. Using the report you can track multiple jobs.

The report displays a method of manufacture for assembly items manufactured on jobs, so a production manager knows what operations and materials requirement is needed to complete each job. The report also includes subcontract operations that some jobs may include.

Selection Parameters

The **Selection** parameters include:

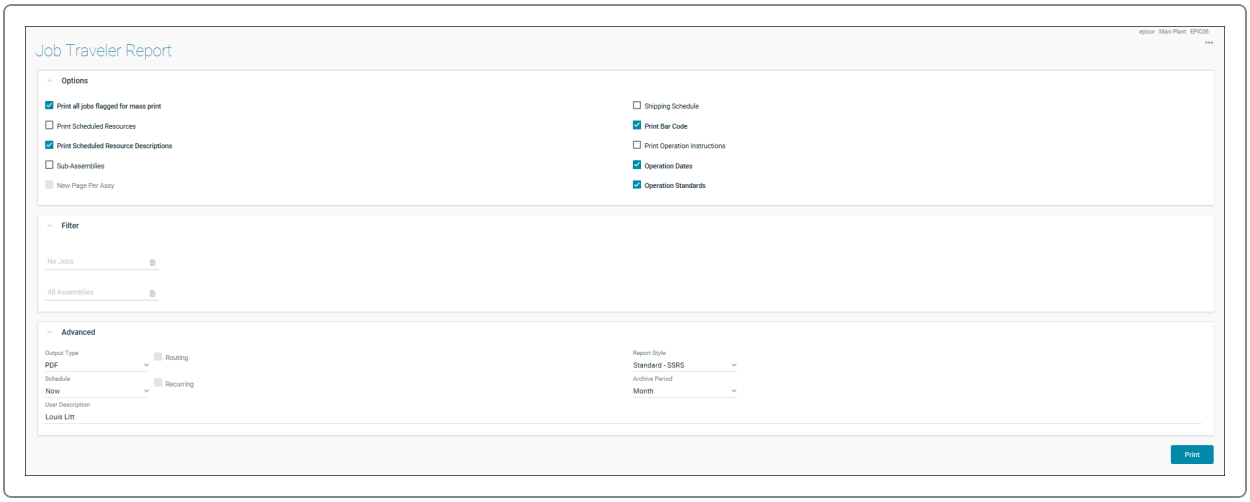
- **Report Options** - Define what you want the report to display by selecting different report options.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. This check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Production Management > Job Management > Reports > Job Traveler**.
2. Select the parameters depending on what you want the report to display.
3. Select **Print Preview**. 


Job Traveler Report
Options
Print all jobs flagged for mass print
Print Scheduled Resources
Print Scheduled Resource Descriptions
Sub-Assemblies
New Page Per Assy
Shipping Schedule
Print Bar Code
Print Operation Instructions
Operation Dates
Operation Standards
Filter
No Jobs
All Assemblies
Advanced
Output Type
PDF
Routing
Schedule
Now
Recurring
User Description
Louis Litt
Report Style
Standard - SSRS
Archive Period
Month
Print

Generating the Production Detail Report

Generate the **Production Detail Report**to print all labor, material, shipping, and invoicing activity to date for the jobs and assemblies you select. Labor and burden display separately. Most cost amounts in Kinetic, including Cost of Sales and WIP, are calculated using the base Unit of Measure (UOM) assigned to the part for which the specific cost is being calculated.

The report also displays profitability information for each job by comparing job costs with the A/R invoicing information as well as information about discrepant material.

For costs analysis in WIP, use the Work In Process (WIP) report. The Production Detail Report doesn't display analysis of the actual unit cost, which is the total actual cost divided by the number of completed parts, as long as the number is greater than zero.

The **Estimated Hours** value in the report reflects the Crew Size value entered in Resource Group Maintenance. The Crew Size value is used as a multiplier to calculate the estimated hours displayed in the report. Based on the Crew Size setting in Resource Group Maintenance, this value may vary from the the value displayed in the Hours field located on the **Job Entry > Job Details > Operations > Detail** sheet.

The **Production Detail Report** includes a **Salvage** column field that is located in the **RAW MATERIALS** report section. The column contains the total Salvage Cost (Salvage Credit) performed against a specific material. The cost is reflected as a deduction.

The **Selection** parameters include:

- **Summary Only** - Select to indicate that the report only displays assembly and total costs. The report won't display Individual material and operation sequences.
- **Consolidated Totals** - This check box causes the report to display the total actual and estimated costs for the selected jobs. The Report Totals displays the totals for the Setup, Production, Labor, Burden, Material and Subcontract costs. The combined Total cost displays at the end of the report.
- **Print Material Transactions** - Select to indicate that the material transaction details will display in the report. Material transactions are all material receipts placed against a job.
- **Print Material Cost Breakdown** - This check box causes the report to separate material cost details by labor cost, subcontract cost, and so on.
- **Print Operation Transactions** - Select to indicate that the operation transaction details will display in the report. Operation Details include all reported labor and shipment/receipt transactions for subcontract operations.
- **Print First Article Transactions** - Select to indicate the first article transaction details will display in the report.
- **Subtotal By Product Group** - This check box causes the Product Group section display in the report. The section divides the estimated and actual costs by each product group referenced by the selected jobs.

- **Exclude Miscellaneous Charges** - Select to indicate that the shipment charges will be removed from the report.
- **Print Profitability Information** - Select to indicate that the profitability information will display in the report. The report will compare costs to the A/R invoices to determine each job's profitability. Profitability data is sensitive information. You can restrict who can select this check box through a security setting. Users who don't have security access to this check box will not be able to select it.
- **Print Serial Numbers** - Select to indicate that the serial numbers will display in the report.
- Print Downtime - Select to indicate whether the report will include downtime. Downtime is used when a resource is in production and something interrupts that production and the resource is down requiring immediate attention. This is different from indirect codes which are used to track non-production time for a variety of reasons.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Report Style** - Select the report style you want to use to run this report.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Production Management > Job Management > Reports > Production Detail**.
2. Select the parameters depending on what you want the report to display.
3. Select **Print Preview**. 

Generating the Work in Process Report

Generate the **Work in Process Report** to review and print the current value of all Work in Process (WIP), Cost to Inventory, and Cost of Sales (COS) items. The report first prints the total costs to-date for each job. Based on the part's current status, the costs are moved into the Inventory, COS, and WIP categories.

When you run the report, simulated COS and WIP activity is automatically captured before the report prints.

The **Selection** parameters include:

- **Current Site** - Indicates that only the cost transactions for the currently selected site will display.
- **Include Jobs not Closed** - Select to display open jobs with WIP balance.
- **Job Closed Date Range** - The start and end dates for the report. All the closed jobs dated from the Start through to the End date display in the report.
- **Transaction Date Range** - The start and end dates for the report. All the jobs with part and labor transactions dated from the Start through to the End date display in the report.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Status (No)** - If you select the **No** option and generate the report, it will display only jobs that have the **WIP Cleared** check box located in Job Completion/Closing Maintenance cleared.
- **Status (Yes)** - If you select the **Yes** option and generate the report, it will display only jobs that have the **WIP Cleared** check box located in Job Completion/Closing Maintenance selected.
- **Status (Both)** - If you select the **Both** option and generate the report, it will display all the jobs that have the **WIP Cleared** check box located in Job Completion/Closing Maintenance selected or cleared.
- **Include Phantoms** - Select to include Phantom Purge WIP transactions in the report. Phantom variances are created during the Capture COS/WIP Activity process. If you clear this check box, the MFG-VAR amount is included on the last WIP report row.
- **Include Non-Posted** - Select to include manufacturing variance amount on the COS\MFG-VAR row. If you clear the check box, the PartTrans MFG-VAR Transactions for the jobs that are not posted to GL will not be included on the COS row in the report. They will display in the WIP Balance row instead.
- **Sort By** - Specifies how you want to organize the report. The list items represent the sorting hierarchy options.
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.

- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Production Management > Job Management > Reports > Work In Process**.
2. Select the parameters depending on what you want the report to display.
3. Select **Print Preview**. 

Generating the Inventory/WIP Reconciliation Report

Run **Inventory/WIP Reconciliation Report** to reconcile the general ledger (GL) with costs from inventory and work-in-process (WIP). You can also preview inventory and labor transactions that the system have not yet posted to the GL before you run the **Capture COS/WIP Activity** process.

As inventory transactions generate, the costs accumulate in WIP and Inventory. Using the report, you can summarize the costs and review the G/L accounts used for each transaction.The system calculates most cost amounts in Kinetic, including Cost of Sales and WIP, using the base unit of measure (UOM) assigned to the part for which it is calculating the specific cost. When you run this report, simulated COS and WIP activity is automatically captured.

The report parameters include:

- **Book ID** - Specifies the GL book identifier you are using for the report.
- **Transaction Apply Date** - Specifies if transactions should be selected for inclusion on the report based on the dates they were entered into the Kinetic application. After selecting the type of date, you can specify a range of dates in the **Start** and **End** fields.
    - Select **Transaction Apply Date** if you wish to include transactions based on their transaction dates.
    - Select **Transaction System Date** if transactions should be included on the report based dates they were actually entered into and created in Kinetic. When you do this, you can specify a range of system dates in the **Start** and **End** fields.
- **Transaction System Date** - Specifies if transactions should be selected for inclusion on the report based on the dates they were entered into Kinetic. After you select the type of date, you can specify a range of dates in the **Start** and **End** fields.
- **Start and End Dates** - Specifies the start and end dates for which transactions are being included on the report.
- **Current Site** - Select the check box if only transactions from the currently selected siteshould be included on the report.
- **Fiscal Year** - The period of time for a fiscal year. This is usually a calendary year.
- **Fiscal Year Suffix** - The suffix of the fiscal year. For example, 'Q1'.
- **Journal Code** - The journal code you are using for the report.
- **Journal Number** - The journal number you are using for the report.
- **GL Account** - Specifies the G/L account for which transactions are being included in the report. You can enter a single G/L account to report associated transactions, skip the field to include all G/L accounts, or click the G/L Account button to find and select the G/L account. If

you enter a single G/L account, the report only processes PartTran and LaborDtl records that reference the entered G/L account.

- **Include Offsetting Accounts** - Select if you want the report to include complete GL transactions for each inventory transaction that affects the selected G/L account.
    - For example, when posting an Inventory transaction of type MFG-STK, Extended Cost amount of $100 has been debited to Inventory. This Extended Cost amount of $100 has been split into two 'cost buckets' of $90 Material Cost and $10 Burden Cost, which have been credited to WIP Material and WIP Burden respectively. If you select the WIP Material account and select the Include Offsetting Accounts check box, the report shows all three movements: debit of $100 to Inventory and credits of $90 to WIP Material and $10 to WIP Burden. If you do not select this check box, the report shows only the credit of $90 to WIP Material.
- **Project** - Specifies the project (if any) you wish to include in the report.
- **WBS Phase** - Select a WBS phase for the project ID entered or selected in the Project field.
- **Full** - Select to display full report, meaning each part transaction that occurred within the date range. The full report also displays the accounts associated with the part transaction.
- **Summarized by Date/Job-Part/Tran Type** - Select for the report to combine on one line all the transactions for identical parts on identical jobs that were run during the same day.
- **Summarized by Date/Tran Type** - Select for the report to combine on one line all the transactions that include the same transaction type on the same date. This is calculated for each account.
- **G/L Posting Detail** - Select one of the three options to determine what you want the report to display.
- **Sort By** - Select if you want the report to include complete GL transactions for each Inventory transaction that affects the selected G/L account.
- **Report Style** - Select the report style you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.
- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Production Management > Job Management > Reports > Inventory/WIP Reconciliation**.
2. Select a **Book** record.
3. Select the **Date Range** as necessary.
4. Define a specific journal entry settings.
5. Select the needed **G/L Account**.
6. Define a project, if any.
7. Select the **Account Level Details** as necessary.
8. Select the **G/L Posting Details** as necessary.
9. Select the **Report Style** for the report run.
10. If you want to generate the report immediately, verify the **Schedule** field displays the **Now** option.
11. Enter how long you would like this report to remain available after it generates by selecting an option from the **Archive Period** drop-down list. As long as the application clock has not passed this time, the report is available on the server to preview and print.
12. Enter text in the **User Description** field.
13. Select the **Recurring** check box if needed.
14. Select **Print Preview**.