



---

# **HMS Demo Script**

---

---

# Copyright

Copyright © 2002 - 2003 Horizons International, Inc.

All rights reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means without the prior written permission of Horizons International, Inc.

Horizons International, Inc.

5520 Wellesley St., Suite 200

La Mesa, CA 91942

U.S.A.

[www.hzs.com](http://www.hzs.com)

Version 7.69

---

# Preparing For the Demo

## **The Demo Data Set**

Horizons makes available a data set that can be used for demo purposes. The data set is in the The World OnLine Company and the same transaction restrictions apply to the Horizons data set as apply to the Great Plains data set. In fact the Horizons data is built upon the original Great Plains data so the user will be familiar with many of the part numbers, vendor and customer files. The company account structure is based on the default accounts from the Manufacturing setups in Great Plains. An inquiry on the account format will show that the segment names have been changed to reflect our demo data needs. Also, there are a number of General Ledger accounts added by Horizons to support WIP posting and other activities not a part of base Great Plains accounts structure that supports manufacturing.

## **Demo Script Contents and Timing**

The Demo script that follows is an all encompassing overview of the product with the exception of the additional modules for Configurator, Engineering Change Order Control and Item Pricing Matrix. These modules have specific windows etc. that are used in lieu of some standard windows, require additional setup activities and demos for these modules must be constructed differently. Please contact our sales department for aid in adjusting your presentation to include these modules. A reasonably paced demo following this outline with few questions from the viewer will take around 1hr and 45 minutes when presented in an overview manner. The Horizons product is very feature rich therefore this script can easily support a more in-depth demonstration up to 4 hours if the user is concerned about viewing all functionality. Lengthy demos with data that is not relevant to the customer are not recommended.

# Demo Preparation and Data Familiarity

As part of the demo preparation it is very important to become familiar with the customer's needs. The Horizons Needs Analysis along with information from the Checklists for the Virtual Plant Tour can be very helpful in developing this familiarity. Within the demo script there are occasions where recommendations on product functionality to demonstrate are prefaced with inquiries as to the customer needs. The following is a list of functionality needs that should be addressed in preparing for the demo so that only those areas truly relevant to the client are demonstrated.

## **Will the client have a use for Reverse Bills of Material in addition to Standard Bills?**

If yes, then complete the data setup to show a reverse BOM using the exercises to create the CABLE SET item. Also review the exercises on creating, posting and recording production information for a reverse work order.

## **Does the client have the need to attach drawings or other documents to records?**

If yes, then be sure that when using the OLE processes, accessed from the Note icon on the windows you can browse to a directory where a document is available for attachment. There are several .bmp files in the dynamics folder that can be used for this purpose.

## **Does the client operate in a Batch Processing environment?**

If they do, you will want to spend more time on the Batch functions in the *BOM Maintenance* and *Finished Good Defaults* windows. There are several batch BOMs in the data set. These are 1-BRNNATWHT-LOAF and BB-WHT LOAF. The difference between the BOMS is that the 1-BRNNATWHT-LOAF is set up as a formula based batch BOM meaning that the quantity of the components is based on making a batch of the parent item, which is 1,000 loaves.

## **Has the client identified a product valuation method?**

If the client has not identified or is still considering their valuation method it is important to demonstrate that both standard and actual costing are supported. This choice of features is best demonstrated in the *Production Time Entry* window. The data set has a perpetual valuation BOM for the part number MB100 and a periodic valuation BOM for the part number MB101. The BOM contents are identical but the cost data for each item in the item card will display in different fields.

## **Will the client require serial or lot control through the manufacturing process?**

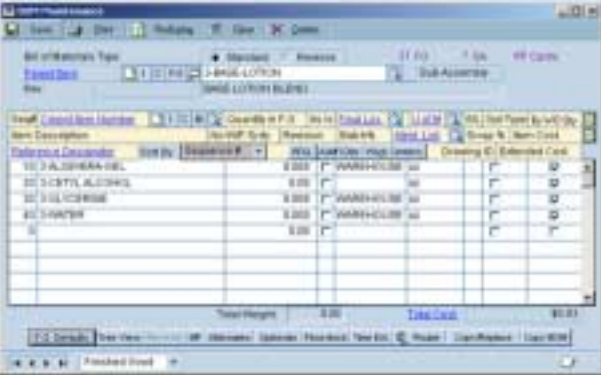
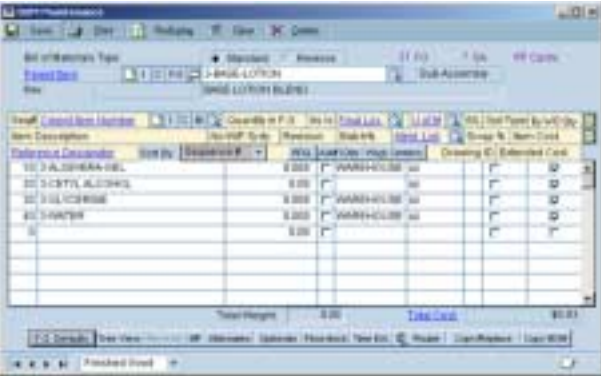
The serial and lot control features are provided through the specific serial and lot control module. The demo data set is developed with the serial and lot control functionality engaged. There are two part numbers that are serial controlled, MB100 and COMPUTER1. These are provided because they allow

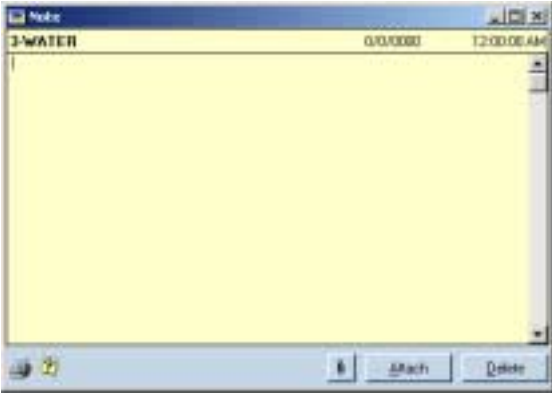
you to show how a serial controlled component, the MB100, can be fully tracked in production as it is consumed by the serial tracked parent item COMPUTER1.


**Does the client have an interest in or will they benefit from using Phantom sub assemblies?**

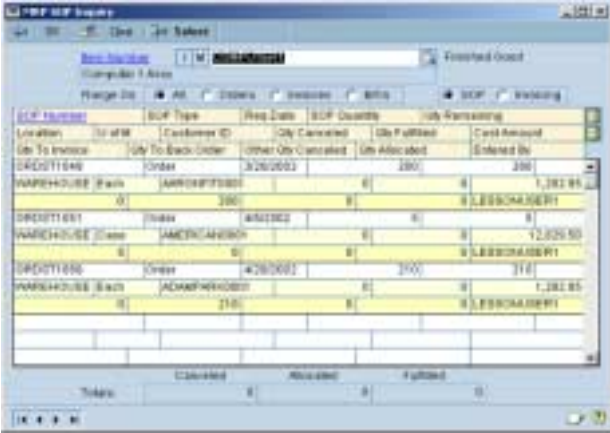
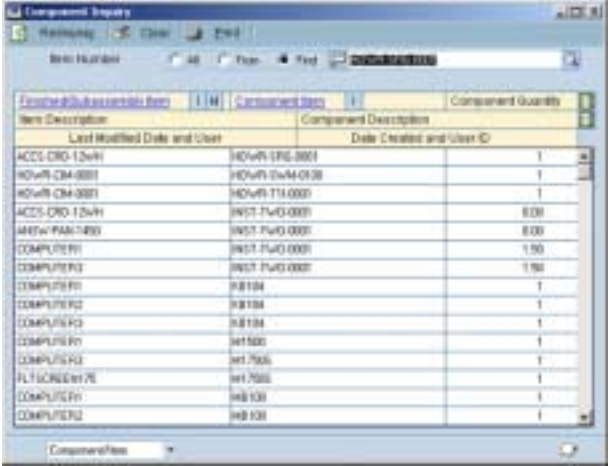
The parent item ANSW-PAN-1450 has a sub assembly ACCS-CRD-12WH which can be set as a phantom sub assembly. To set as a phantom sub assembly access the *Finished Good Defaults* window for the ACCS-CRD-12WH and in the Make/Buy list box selection choose **Phantom**.



What to do	What to say
<p>1. Open a Bill of Materials.</p> 	<p>Let's cover some of the basics to give you an idea of what you can do with the Bill of Materials.</p> <p>First of all, you will see throughout HMS as well as throughout MBS these blue underlined items that look like hyperlinks on a web page. These mean that there is more information available about the item in that field. For example, lets drill down on the Parent Item. This opens up the item maintenance card in the inventory system. Now this window is actually part of MBS - not HMS.</p>
<p>2. Click on the <b>Parent Item</b> heading and then click IM to open the MBS <i>Item Maintenance</i> window.</p> 	<p>The concept here is that you will be able to go in and out of various windows within both the MBS system and the HMS system that contain relevant data about the item that you are working with and you won't have to close the first window to access the second one. This is a standard feature throughout MBS as well as HMS and is available on nearly every window we have.</p>
<p>3. Close the <i>Item Maintenance</i> window to return to <i>BOM Maintenance</i>.</p> <p><b>NOTE:</b>It would help to attach a drawing to prove that drawings, in fact, can be attached.</p>	

What to do	What to say
<p>4. Point to the note icons next to the Parent Item field and the Cmpnt Item Number label in the header of the scrolling region.</p> <p>5. Click an item in the scrolling region and then click the Note icon to open the note window.</p>  <p>6. Enter some text and click the Attach button to attach the note to the item.</p>	<p>Another standard feature throughout is the ability to attach instructions or notes at just about any level within the system. As you can see here, you can attach a note to the Parent Item as well as the raw materials that we are using.</p> <p>Attaching a note allows you to basically put a set of instructions and, because the notes have the ability to attach documents using Windows' Object Linking and Embedding, you can actually attach drawings, spreadsheets or other outside documents to the note, as well. Again, this is a standard function that you will see throughout the system.</p>

What to do	What to say
<p>7. Point to the I button next to the Parent Item field in the header of the window and the Cmpnt Item Number in the header of the scrolling region.</p> <p>8. Click the I button next to the Parent Item field to open the HMS Quantities Inquiry window.</p>  <p>9. Click on SOP Orders to open</p>	<p>On the manufacturing side notice the I button. Again this button is present for both the raw material side as well as the parent item's side. This is used for inventory quantity inquiry. This is a function that we've added that allows you to view the status of a material item throughout the system. It basically identifies the activity of that particular component. Actually, it doesn't have to be an item that is involved with the manufacturing at all. It can be used for any item in inventory. For example, if you have sales orders for particular quantity, if you have movement in inventory for an item, for example you are performing inventory transfers, this window will track that for you. We're also, of course, telling you what you have committed to use up in production.</p> <p>The net result is displayed at the bottom of the window and whenever you see a negative number, the system is telling you that you don't have enough to meet demand. This means that you're going to have to buy or make something.</p> <p>Now be aware that this is not constantly updating, it is just a snapshot of that particular item at that particular time, so other changes going on in the system while you're viewing this window will not be displayed until you either Recalculate or close the window and re-open it.</p>

What to do	What to say
<p>10. Click the expansion button next to the Qty in SOP Orders field to open the MRP SOP Inquiry window.</p>  <p>11. Highlight a Sales Order and click the blue SOP Number heading to view the sales document.</p>	<p>Another good thing about this window is that it always gives you access to the source of the numbers that you're seeing. It always tells you where those numbers came from by clicking the expansion button next to that particular number.</p> <p>You can do this not only for the sales side, but also for the purchase orders, work orders or other activity in the system.</p>
<p>12. Close the Production Qtys Zoom window and return to the HMS Quantities Inquiry window.</p> <p>13. Scroll through the various locations using the arrow buttons next to the Inventory Location field.</p>	<p>Notice, also, that this window can display and report on all locations within the system, either individually or with a total for all locations. This can be done either on screen or in a printed report.</p>
<p>14. Close the HMS Quantities Inquiry window and return to the BOM Maintenance window.</p> <p>15. Point to and click on the C button anywhere on the window.</p> 	<p>Another piece of standard functionality in manufacturing is the C button. This is also called Components Where Used. It is a method of viewing what Bills of Materials a particular item is being used in.</p> <p>This can be used for reporting purposes, but we use the same functionality in our mass editing tool when you need to replace a component everywhere it exists. So, instead of going to each Bill of Material and editing it manually, we allow you to do it <i>en masse</i>.</p> <p>This is functionality that you will see in several areas in the system.</p>

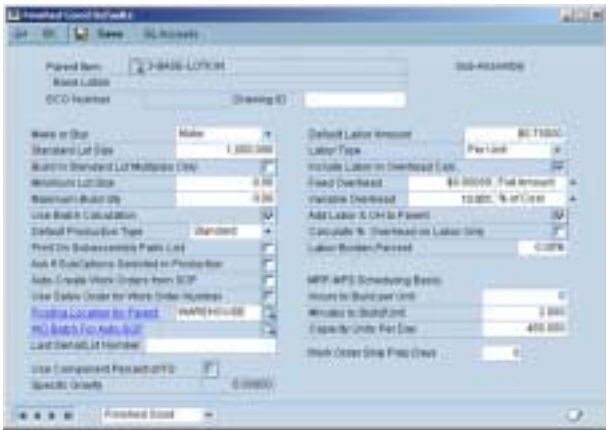
What to do	What to say
------------	-------------

**NOTE:** Steps 16 through 22 are optional and should only be performed if the customer is a Process manufacturer

16. Return to the BOM Maintenance window.



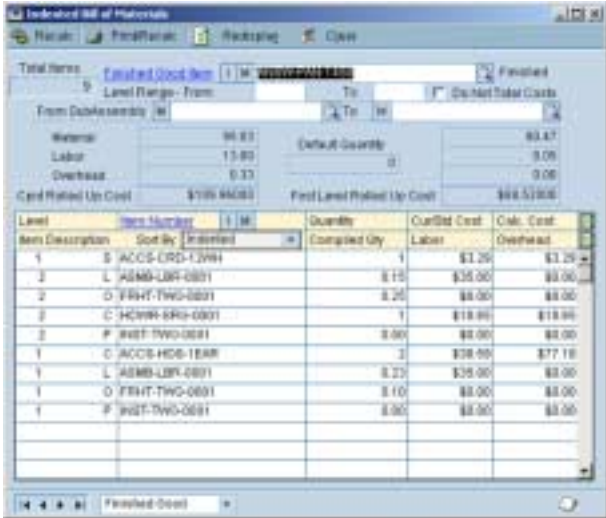
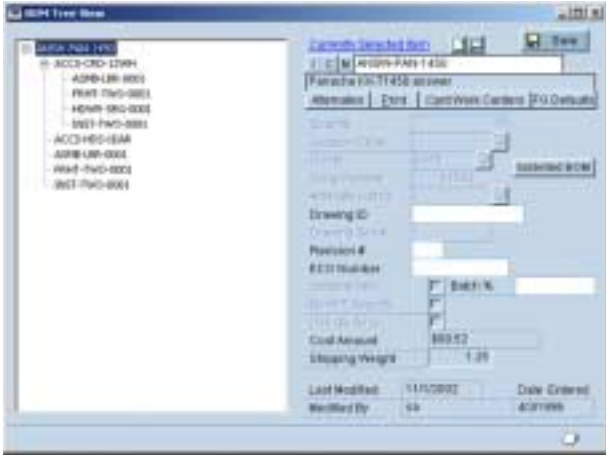
17. Open the Finished Goods Defaults window and point to the Standard Lot Size field.

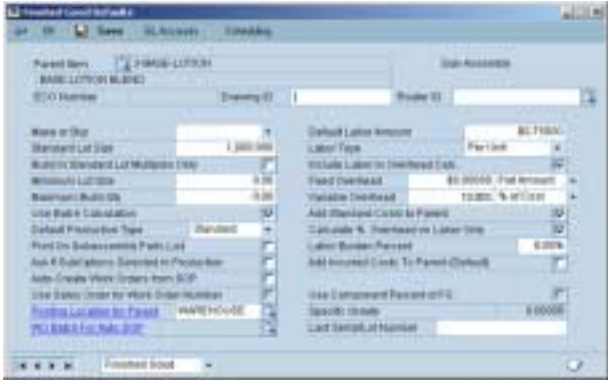



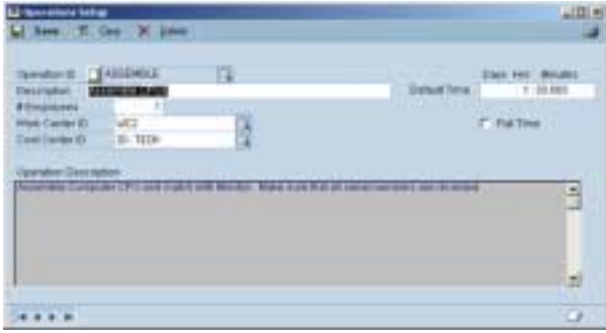
In addition to the Discrete bill of materials, our system allows you to do Batch processing, or percentage Bill of materials as well Mixed Mode Bill of Materials which is what we call a combination of Discrete and Batch. To specify that a bill of materials will be a Batch bill, you must specify that the BOM will use Batch calculations. This tells the system that we will be making the Finished Good item in that batch quantity and that the quantities entered for the raw materials on the BOM will be specific to the batch quantity - not the individual unit. For example, if you have a Standard Lot Size of 1000 and you need a quantity of one for each finished good produced, you must enter 1000 on the bill of materials for the component.

<b>What to do</b>	<b>What to say</b>
<p>18. Point to and mark the Use Component Percent of FG field.</p> <p>19. Close the window and return to BOM Maintenance.</p> <p>20. Expand the lines in the scrolling region and demonstrate entering a percentage in the Batch % field for one of the items.</p>	<p>Now, you may decide that you need to use a percentage Bill of Materials. To do that, you must mark the Use Component Percent of FG checkbox in the Finished Good Defaults window and then, instead of setting quantities for each component you would set a percentage for each item, using the Batch % field.</p> <p>Here, you're basically setting up a formula saying that, for instance, 25% of the production is going to be made up of this particular item and so on until you reach 100%.</p> <p>Then, when you calculate the production order, the system will tell you what quantities you will need for your material components based on the quantity of the finished good being built.</p>

What to do	What to say
<p>21. Demonstrate entering numbers in the Quantity in F.G. field.</p> <p>22. Mark the By WO Qty field for the items that have a value in the Batch % field.</p> <p>23. Point to the S/L column.</p>	<p>You can also mix and match discrete with process materials which is what we call mixed mode. An example of this might be producing chemicals and bottling them. The chemicals themselves are process materials while the bottles are discrete items. These can be combined on one Bill of Material.</p> <p>To do this you would mark the By WO Qty field for the process items, because they will be entirely consumed by the production. The bottles, on the other hand, will NOT have the By WO Qty field marked because they may not all be consumed by the production.</p> <p>For example, let's say that due to some outside factor, like evaporation, we end up with less finished product than we expected. So, instead of 1,000 gallons of chemicals, we end up with 975 gallons. In that case we will not need all of the bottles originally called for, so the system will allow us to place those unused bottles back into inventory for use the next time around.</p> <p>If the component items in this BOM are serial or lot tracked, the system will display an S or L character in this column. The product provides full serial and lot traceability through the complete manufacturing process.</p>

What to do	What to say
<p>1. Click the expansion button next to the Parent Item field to open the Indented Bill of Materials. (make sure that you bring up an item that has multiple levels of sub-assemblies)</p>  <p>2. Close the Indented BOM window and return to BOM Maintenance.</p>	<p>Another feature that we have is an unlimited number of levels in the Bill of Materials. The number on the left indicates the level at which the component resides, while on the right the cost of the item is displayed. Now the cost displayed here is determined by the valuation method established for the item in the Item Maintenance window. We don't care what valuation method you use. You can use Standard, you can use Actual or you can even mix and match them. Many users like that they can achieve full actual cost with one product. One thing that we do, however, is break out the costs into material, labor and overhead. This is so that you can always do estimating on the Bill of Materials as you are designing it. We support obtaining costs using a variety of methods, from component line items to using Routers and Shop Floor Control.</p>
<p>3. Click the Treeview button to open the BOM Tree View window.</p>  <p>4. Expand the tree to view the various levels.</p> <p>5. Close the Treeview window.</p>	<p>Another way of looking at this information is to use the Treeview. The treeview gives a more graphical view of the whole Bill of Material. The advantage of this particular window is that it allows you to not only see all of the levels, but to work and edit at any level of the BOM at one time without having to bring up each individual sub-assembly BOM. This makes it a lot easier to get around and make adjustments.</p>
<p><b>NOTE:</b> Prior to opening Finished Good Defaults, ask the user how they want to handle labor and overhead. Determine whether they will use Router or not. If they are not sure, go to step 6 below. If they will use Router, go to the Router demo, beginning on step 11 below.</p>	

What to do	What to say
<p>6. Open Finished Good Defaults and enter an amount in the Default Labor Amount field. Then select a Labor Type.</p>  <p>7. Enter a percentage in the Variable Overhead field.</p> <p>8. Point to the Include Labor in Overhead Calc. field and the Calculate % Overhead on Labor Only field.</p> <p>9. Enter a percentage in the Labor Burden Percent field.</p> <p>10. Point to the Add Standard Costs to Parent field.</p>	<p>One of the ways that labor and overhead can be setup on for an item is through the Finished Good Defaults window.</p> <p>You can setup a Default Labor Amount for the Bill of Materials and then you can tell the system whether you want that to be charged based on a flat amount, or on a per unit, per hour or per minute basis.</p> <p>You can also setup an variable overhead cost to this, which can be calculated as either a percentage of the cost of the item or on a dollar per unit basis. For example, you say that for every item built using this BOM, you want to charge an additional 50% overhead. You can mix this up. You can have your overhead based on labor or you can have it based on materials or both.</p> <p>We also have the ability to add Labor Burden costs. So you can add additional burden costs to your production overall. Keep in mind that these costs are setup for the whole Bill of Materials.</p> <p>These costs can be estimated amounts, meaning that we don't want these costs to roll up to the production order, we just want to compare against them. Then in the order itself, we will enter, through time sheets, actual cost to produce these items. Or you tell the system that this is the cost and that it will roll up.</p>

What to do	What to say
<p>11. From BOM Maintenance click the Router button.</p> 	<p>The other method that you may want to use is to break these costs out and use a Router. The Router is, basically, a set of operations that will determine how much time it's going to take to produce these items, along with different types of costs that you want to track. For instance, you may have different departments or different functions that you want to be able to do productivity reports on. So, as you select an Operation, the system will add cost centers and work centers. You can adjust the time and the system will then calculate and update the costs involved.</p>
<p>12. Select an Operation and enter a time to display the automatic cost calculation.</p>	<p>An operation is just a set of instructions about what needs to be done at a particular point in time in production. For example, an operation might be "Assemble". And it will take a certain amount of time to accomplish this operation.</p>
<p>13. Go to Operations Setup window.</p> 	<p>You can also specify whether the operation is a run operation, meaning that for every unit the time will be multiplied. Or an operation might be specified as a Flat Time which means that it is a function that only happens once during the whole production. For example, a flat time operation might include queue time, setup time or wait time or move time. It's basically a fixed time and cost associated with the production.</p>

### What to do

### What to say

#### 14. Open Cost Center Setup.



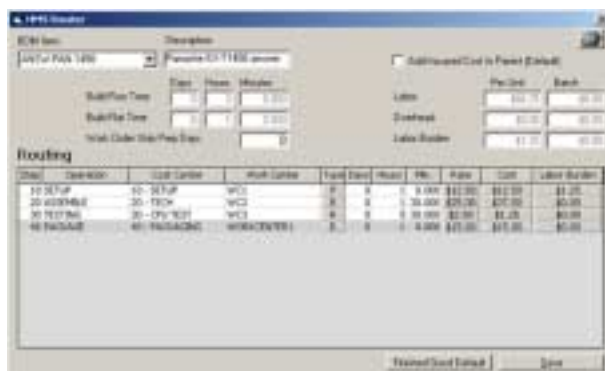
For every Operation there must be a rate setup. So you need to tell the system for each Operation that a certain type of function is going on that costs a certain amount. We do this using Cost Centers.

A cost center can be anything you want it to be. It can be an employee that is actually physically doing time for you. It can be an overhead cost, just an external charge for whatever reason. If you do outsourcing, where you send an item out and some other vendor does a function for you and then you get it back, you can setup a Vendor Service type of Cost Center.


The other advantage here is that you can specify different GL accounts, if you want these accounts to be tracked. For example, you may use different WIP accounts that you want to track in more detail. You could also use this for calculating lead times for Outsource Vendors, all of whom have different GL posting accounts.


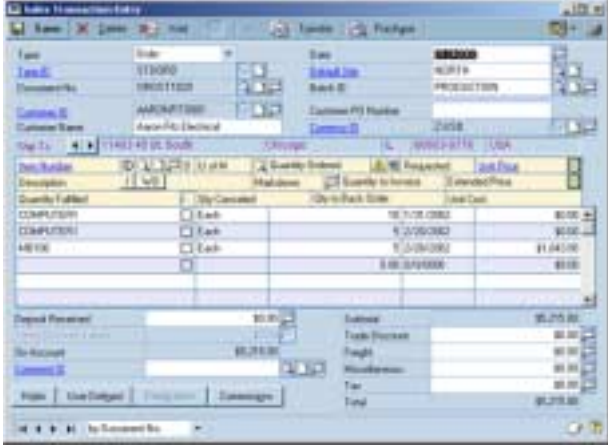
The basic concept here is being able to setup rates so that you can have the operation work with the cost center to determine the time to produce your item and also how much it is going to cost to produce that particular item. Now, once you have those setup, you attach them to the Bill of Materials through the Router.

#### 15. Return to the Router window with step information displayed.






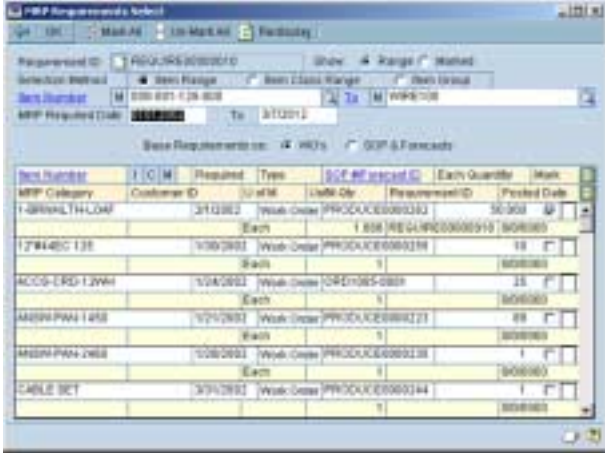
Step	Description	Cost Center	Work Center	Prod. Date	Start	End	Rate	Cost	Labor Burden
10	SETUP	20-TECH	WPC1	8	8	8	0.000	\$12.00	\$12.00
20	ASSEMBLY	20-TECH	WPC2	8	8	8	30.000	\$75.00	\$75.00
30	TESTING	20-CPY-TEST	WPC3	8	8	8	30.000	\$75.00	\$75.00
40	PACKAGING	40-PACKAGING	WPC4	8	8	8	0.000	\$12.00	\$12.00

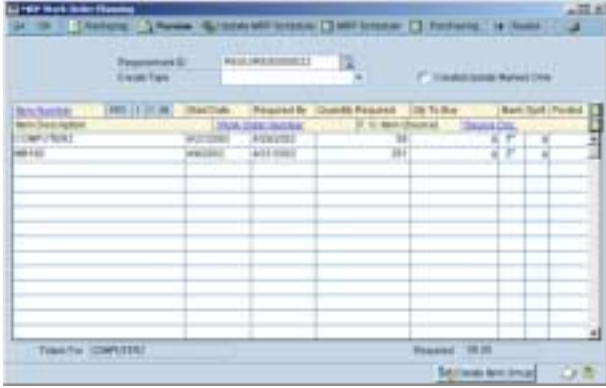
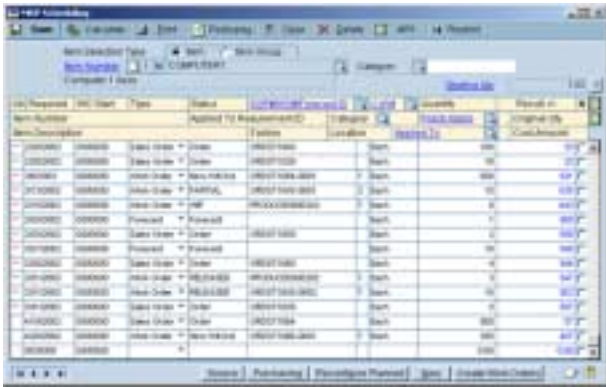
What to do	What to say
<p>16. Point out the various types of operations that are setup for the routing.</p> <ol style="list-style-type: none"> <li>1. Go to Production Entry and create a work order for the demo item. Calculate the work order to pull in the router information.</li> <li>2. In the Go To menu, select the Time Entry option to open the Production Time Entry window.</li> </ol>  <ol style="list-style-type: none"> <li>3. Point to the various cost columns across the top of the window.</li> <li>4. Close the Production Time Entry window.</li> </ol>	<p>Here you can see the various times and costs associated with producing the item. As steps are added or removed, everything gets adjusted automatically by the system.</p> <p>The main concept here is that, once you have set these up, when you create a work order, the system takes this information and adds it to the work order and it determines what it should cost to make that particular item in the quantity specified on the work order. This will provide comparison data between the data you have entered and the raw materials.</p> <p>We don't care if you're using Standard cost or Actual costing. We're always going to compare against the original Bill of Materials. So as you're creating the work order, we can tell you, based on what you setup, that this is what should have happened and then, when you're actually doing the production, this is what really happened. And then you'll be able to print a variety of reports based on that information.</p> <p>And, if you're using standard cost, if there's any fluctuation with the actual costing of that particular item, we WILL post to a variance account for you as part of the standard accounting process within the system.</p>

What to do	What to say
<p>5. Return to the BOM Maintenance window and choose an item.</p> 	<p>As you can see, there is a lot of information on the Bill of Material that actually determines what is going to happen in production. We have some features that can help you in various ways, depending on your particular source of demand. Whether it is make to order, based on sales orders, or make to stock. One of the first options that you'll have is the ability to tell the system, right off of the Bill of Material, that this particular item should always have a work order created for it whenever it appears on a sales order. This means that there is absolutely no input required to create a work order. When the salesperson puts in a line item for this particular item on the sales order, as soon as they enter a quantity and tab off of the line, we create the work order. It's that quick.</p>
<p>6. Open Finished Good Defaults and mark the Auto-Create Work Orders from SOP checkbox.</p> <p>7. Go to Sales Transaction Entry and create a sales order for the item.</p>	<p>Now, of course, before the system does this, it looks at inventory and determines whether there is enough of the item in stock to meet the demand on the sales order. If there is some in stock but not enough to fulfill the requirements, the system will create the work order to make up the difference. Keep in mind, however, that if you have specified a Standard Lot Size for the item and have marked the Build in Standard Lot Multiples Only checkbox, the system will create work orders for the lot size, regardless of how many there are on hand to meet the demand.</p>
	<p>Now keep in mind that every time we do that we create the work order based on the build time that you've setup on the Bill of Material, either through the Router or manually.</p>

What to do	What to say
<p>8. Click the expansion button to display the other fields that are available.</p> <p>9. Point to the Req Ship Date field in the expanded region.</p> <p>10. Return to the BOM Maintenance window and click the FG Defaults button.</p>	<p>When you create work orders this way, you are creating them for the parent item only - not for the sub-assemblies. In order to create the work orders for the sub-assemblies of that parent item, you need to run the MRP. Materials demand is created right away. The MRP does the same thing. It will create work orders for those parent items off of sales orders or forecasts or anything that you want it to. The difference here is that the MRP completely does the time phasing for all of the different levels. Plus it takes into account things like safety stock and reorder levels. The whole concept behind MRP is to figure out what has to be made, when it has to be made and what we have to buy, when do we have to buy, and how many do we have to buy in order to make those items in time. In HMS this is all based on the Requested Ship Date for the item.</p> <p>Now, on the sales order this field is in the scrolling region and, in order to see it, we have to click the expansion button. Notice that this IS Microsoft Business Solutions sales order. We don't re-invent anything, we don't change anything, it's exactly the same functionality, so you don't have to do anything special here and there's really nothing new to learn.</p> <p>Now this Requested Ship Date is the date that we're going to start basing our timing from. The system is going to see that, from that date, we have a build time of so much and we've got to build so many of these items. Therefore, you've got to start the work order on this date if you want to meet your scheduled date here. Plus, we've added an option to that which says that if we want to make sure that the production is complete three days before it needs to ship, for whatever reason, we</p>

What to do	What to say
<p>11. Click the Scheduling button to open the Scheduling window.</p> 	<p>can setup what we call Ship Prep Days, right on the Bill of Materials. This is done in the Scheduling window, which is accessed through the Scheduling button in the Finished Good Defaults window on the Bill of Materials. So, if we enter, say, three days here, the system will look at the build time and then add three days to it because we need to finish three days beforehand. The system will actually put in a buffer based on the number entered here.</p>
<p>12. Point to the Work Order Ship Prep Days field.</p> <p>13. Close the windows.</p> <p>14. Open the MRP Processing window.</p>	<p>MRP looks at all of that, figures everything out and says, this is what you're going to end up having to do. Now notice that on the MRP side you have a lot of options. There are all kinds of things that you can do. For instance, here is your Reorder Level - Safety Stock. If you want the system to calculate that, you need to mark it and the system will take it into account.</p>
 <p>15. Point to the Use Reorder Level (Safety Stock) field.</p>	<p>The Minimum Order Level is actually the minimum order level from a vendor. So let's say that for best cost reasons we have to buy 1,000 every time we buy from this particular vendor, marking this field will maintain that for you.</p>
<p>16. Point to the Use Minimum Order Level field.</p>	<p>You also have different ways to select vendors. Especially if you're an ISO type company and you have service ratings, you can set those up and we'll try to find you the best vendor based on those ratings.</p>
<p>17. Click the Vendors button to open the Vendor Selection Methods window.</p> 	<p>You also have several other options and whatever you choose, HMS will try to find the best vendor based on those options.</p>

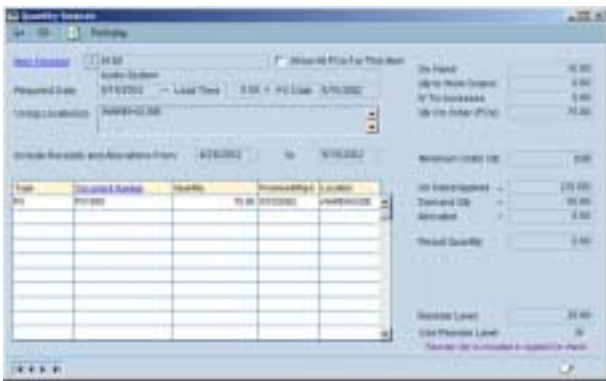
What to do	What to say
<p>18. Close the Vendor Selection Methods window.</p> <p>19. Click the Select button to open the MRP Requirements Select window.</p>  <p>20. Point to the Type field to point out the types of information available.</p> <p>21. Point to the Mark field to indicate that you can select any individual item.</p> <p>22. Return to the MRP Processing window.</p> <p>23. Point to the Item Selection Methods.</p>	<p>So you have options on how you'll choose vendors. You also have options on how you'll calculate the MRP. You see, our MRP is what we call a regenerative MRP. The other type of MRP is called a netting MRP. HMS uses regenerative because the companies that we deal with tend to be medium sized to smaller manufacturers and they always have changes going on in the system. Every day there's something happening that's not consistent. For that reason we allow different "What-If" options when you calculate the MRP. You can do what we call expediting on one particular work order. For instance, if I have a customer, they're a good customer and I want to schedule this right now and I want to make sure that I have the materials right now, I can actually go into the MRP system and pick and choose exactly what I want the MRP to calculate on. I can narrow it down to a forecast, a sales order, or a work order or any combination of these things. This is a big advantage when you're dealing with change all the time.</p> <p>When you compile the MRP, you can compile based on an Item Range, a class of items or you can do it on item groups. Item Groups are created within the manufacturing suite and they allow you to specify any set of items that you want to treat as a group, for whatever reason. The items don't have to be related in any way to be part of an Item Group. When you compile this, you have different options. You can compile it to only look at the production side or only look at the purchasing side or both. When you compile the system goes out and looks at all the demand in the system. Demand comes from forecasts, it comes</p>

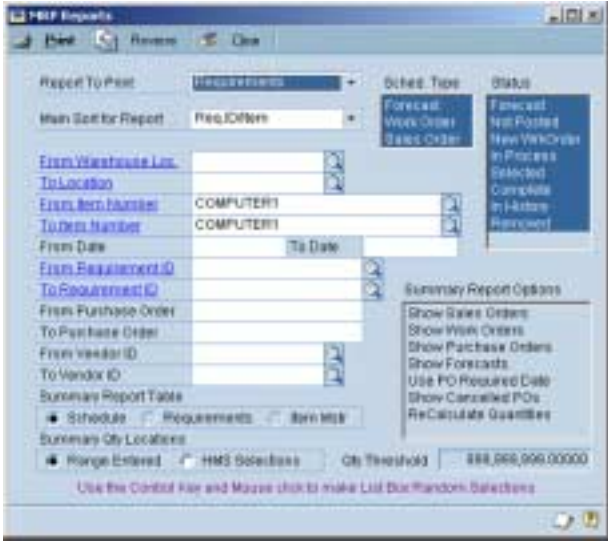
What to do	What to say
<p>24. Click the WO Planning button to open the MRP Work Order Planning window.</p> 	<p>from the sales orders or it comes from other work orders. Then it looks at all the different levels and determines when you need to start producing a particular item to be able to meet the demand. Demand could even come from a different work order with a different parent item. In other words, a sub-assembly within a sub-assembly.</p> <p>Once you have the MRP compiled, you have a couple of options. After MRP creates a lot of data, we have streamlined this output by breaking the results into two areas - Work Orders and Purchase orders.</p> <p>Selecting Work Order planning will give you access to a Work Order Workbench. You can easily move to Purchase Orders if you are managing in a Buyer/Planner function or you can concentrate on just Work Orders.</p> <p>This window is just an editing window that allows you to perform various operations, prior to actually creating any work orders. For example, you might want to split a work order. The system might suggest a work order for a particular item, but you decide that you actually want to make the item on three different work orders. Or you may want to group all like items on one work order. In this window you can tell the system to create one work order per item or one work order per line.</p>
<p>25. Click the MRP Schedule button to open the MRP Scheduling window.</p> 	<p>Once you've made any changes, you'll update these changes to the MRP Schedule which is where most of the work is actually performed. The MRP Schedule identifies all of the activity for an item in the system. It displays all of the work order, sales orders and forecasts that are present for the item. It is sorted by date on the left and then on the right you can see</p>

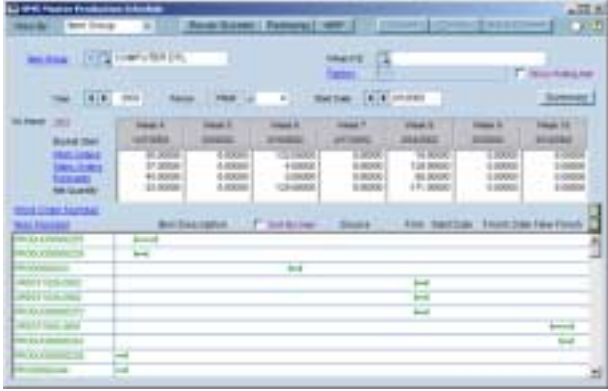



What to do	What to say
<p>32. Create a Forecast for your demo item.</p> <p>33. Point out the change in the Result +/- column.</p> <p>34. Enter a sales order for a date that falls within the bucket specified in the setup.</p> <p>35. Point out the change in the Quantity field for the Forecast.</p>	<p>You can setup forecasts so now I'll create a forecast and you'll see on the right how things get netted out.</p> <p>The thing about forecasts in the Schedule is that they are tied to sales orders. This means that, depending on how you setup the bucket, for example, monthly or weekly, any sales order that is created for that particular item in that bucket will decrement the forecast.</p> <p>So, looking at the forecast we just created, if I enter a sales order here that is within the bucket specified in the setup, the forecast will be decremented by the amount of the sales order.</p> <p>Now, you can do something else here. Let's say that I do want to schedule production, but I don't want to actually create a work order yet. I know that I want to build a thousand every month and I want to be able to plan my buying for that particular production. So I can create a planned work order. The system can tell the difference between a manual planned work order and a system planned work order and it will maintain the manual ones, even when the MRP is recalculated.</p>


What to do	What to say
<p>36. Change the display to view by Item Group and select an item group using the lookup.</p> <ol style="list-style-type: none"> <li>1. Click the Purchasing button to open the MRP Purchasing window.</li> <li>2. Lookup or select a Requirement ID.</li> <li>3. Click the Restrict button to open the Restrict window.</li> </ol>	<p>And, when the time comes, you can convert that into an actual work order. So, you can see that there are a lot of different combinations for how you can make this thing work.</p> <p>Now, you can see that we're only looking at one item here. Since dealing with only one item at a time can be very time consuming, we have given you the ability to view by item groups, as well as by individual item. Then the schedule will list all of the activity for all of the items in that group.</p> <p>Now that's the scheduling side of the equation. On the other side, the purchasing side, there is very similar functionality. We can use the restrict function to look only at certain items and certain dates that we're dealing with.</p> <p>Similar to the MRP Schedule using Start and End dates, the purchasing side of things is looking at the recommended purchase order date, which is the date that you need to get the purchase order out to the vendor, and we're also dealing with the required date, which is when we expect to receive that particular item.</p>

What to do	What to say
<p>4. Select an item and click the ? (question mark) button.</p>  <p>5. Mark the Show All POs For This Item field.</p> <p>6. Close the Quantity Sources window.</p> <p>7. Select an item to create a Purchase Order for. Make sure that this is the only item that is Marked in the scrolling region.</p>	<p>Now there's a netting function here that says that, as time moves on, we're going to have an increase in inventory at a particular time in the future. So you can see, based on that information, what is really happening. As an example, I am going to zoom on this item and then I'm going to click this Question Mark button. This window basically looks at the time bucket and shows me what is coming in for that item during that particular bucket. If I want to look at all of the future items, I can click the Show All POs For This Item, and the system will show me everything. So, to give you an idea of how real-time this can be, I'm going to setup a purchase order for an item. Now keep in mind that this is an MBS function that we're initiating. But, since we're looking at the system in real-time, you can go out and make changes to any of those purchase orders that we've created, outside of the MRP system, and our system will see those changes. Regardless of what we're doing here for you on the MRP side, we're looking at quantity on hand, we're looking at any activity for that particular item, what's being used in production when the calculations are performed, what's allocated on other sales orders. The system comes up and makes its recommendation for you based on the item's information. The system tries to also automatically choose a vendor for you based on your selections. But you can also change vendors on the fly here. This is an editing window which is basically</p>

What to do	What to say
<p>8. Click the Print button to open the MRP Reports window.</p>  <p>9. Click the Create POs button to open the Requirements Purchase Orders window.</p> <p>10. Click Continue.</p> <p>11. Click Create POs.</p>	<p>designed for you to schedule what you have to buy.</p> <p>You're also going to have the option of telling the system that you want to group the purchase orders on a weekly basis. To do this, you setup a leeway time so that everything within that one week gets grouped onto one PO. Plus you can setup different lead times for different items. You can even have the same item coming from different vendors, each with a different lead time. It's all setup on an item per vendor basis.</p> <p>There are also a variety of reports that you can use to break down by vendor, by dates, by item, or by any number of other types of information. Keep in mind, however, that these are standard reports that are in the system. But you have access to these reports through report writer, so that you can customize, make changes or even make your own reports, if you like.</p> <p>Once you've decided that you're ready, the next step is to go out and create the purchase orders.</p>

What to do	What to say
<ol style="list-style-type: none"> <li>1. Close all windows and open the HMS Master Production Schedule window.</li> </ol>  <ol style="list-style-type: none"> <li>2. Select an item to view and set the Period so that work orders display</li> <li>3. Change the View By to Item Group.</li> <li>4. Enter a new What If ID.</li> <li>5. Enter a New Finish date for an item to adjust the schedule.</li> <li>6. Click the Make Current button.</li> <li>7. Close the MPS window.</li> </ol>	<p>Next we have the Master Production Schedule. The schedule displays all of the Work Orders for a particular item or range of items based on the period of time that you select. This time bucket can be Days, Weeks, Months, or whatever type of time period that you want.</p> <p>Once you have your item and bucket selected, the system will show you all of the work orders for that item that are in the system. If, for instance, you have the period set to Days, and you have a work order that will take several days to complete, you will see a line spanning the amount of time that it should take to complete the work order.</p> <p>This is a planning tool and, like MRP, you can use Item Classes and Item Groups here to view the scheduled work orders for a variety of items at one time. The graph can show you where you may be overloaded. However, it is up to you to decide what to do IF you are overloaded.</p> <p>To help you with this, we have provided an unlimited amount of What-If capability. To use this, you have to create a What If ID and the system will copy the list of work orders to the new ID. Then you can move the work orders around by entering New Finish dates for them, and the system will adjust the display.</p> <p>Once you have everything the way you want it, you can turn that back into the actual schedule by clicking the Make Current button. The system will then go out and adjust the dates of the actual work orders to match the changes that you have made to the schedule. Once you're done with this, you need to go out and run the MRP again to re-adjust and make sure that you will get all of the items that you need in time.</p>

What to do	What to say
<ol style="list-style-type: none"> <li>1. Open the Production Entry window and bring up a work order that has not yet been calculated. Point out the status of New.</li> </ol>  <ol style="list-style-type: none"> <li>2. Click on the blue Status heading to open the Status Maintenance window.</li> <li>3. Click the Auto Set Status When field to display the list.</li> <li>4. Select Finals Entry from the Go To drop down menu.</li> <li>5. Enter a different Qty to Post.</li> <li>6. Point to the Rejected Qty field and the Scrap fields.</li> <li>7. Close the Finals window</li> <li>8. Select Work In Process from the Go To drop down.</li> <li>9. Click the Issue button to open the Production Transfer window.</li> </ol>	<p>This window displays the actual work order. Notice the status says New. This is because this particular work order has not yet been calculated. Now watch what happens when I do calculate it. The status changed to Released. This work order is now considered to be released for production.</p> <p>It doesn't have to say Released when the work order is calculated, though. Statuses are user-defined. You can make up any name that you want and have the system set the work order to that status on any one of a number of events. Or, the statuses may be manually changed at any time during production. Now, once the work order has been calculated, that's it. Nothing more is required in the simplest scenario. You can go ahead and post the work order to update the component quantities in inventory, accumulate all of the costs and put the final product into inventory so that it can be sold or used for something else.</p> <p>Of course, there are other features and things that you can do before you get to this point. For example, you can actually produce more or less than you plan on. You can make these type of adjustments in the Finals window. In this window you can also reject items and enter Scrap quantities for your raw material items.</p> <p>You can also, using the Work In Process component, add a new material item or select an alternative item to replace one of the items that you're using to complete the work order. Now let's say that your production process takes a few days and you don't want the items that you've committed to</p>

What to do	What to say
<p>10. Close the Production Transfer and WIP windows and return to the Production Entry window.</p> <p>11. Select Serial/Lot Entry from the Go To drop down.</p>  <p>12. Click a raw material item to open the bottom window.</p> <p>13. Specify a lot number to use.</p> <p>14. Click the Apply button to open the Production Serial_Lot Apply window.</p>	<p>production to appear to be available for someone else to use. You can go into the Issue part of the program and transfer those materials out to a different location, for example, a Work In Process area. So then it is unavailable for anyone else to use in a production run.</p> <p>We also have Serial and Lot control capabilities. This is also accessed right off of the Work Order. Now you assign your own lot numbers to the product that you're making. And the raw materials will have lot numbers assigned to them, through your purchasing system, based on what you bought. So they will be listed in inventory. So when you want to assign them, you highlight a particular raw material and the system will show you all of the lots that you have received. Then you can tell the system that you want to use a particular lot and assign it to this particular production. You can also mix and match lots. You can say that you want to use some of this lot and some of that lot.</p> <p>Then you can apply that lot number that you're using of the raw material to the item that you're actually producing. Once I have done that, I can get a report based on the customer or a lot number or some other data that can tell you what raw materials went into it and what lot numbers they came from so that you can trace that back to the original vendor. This provides full traceability for customers that need that type of functionality.</p>