



Microsoft Dynamics® GP
Manufacturing Setup

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Introduction

You can use Manufacturing to organize and track the daily workings of the manufacturing process, such as taking orders, purchasing raw materials, building finished goods, fulfilling orders, and selling the finished goods.

This introduction is divided into the following sections:

- [Manufacturing documentation](#)
- [What's in this manual](#)
- [Symbols and conventions](#)
- [Resources available from the Help menu](#)
- [Send us your documentation comments](#)

Manufacturing documentation

Manufacturing documentation is divided into five manuals. Refer to the following table for an overview of what is included in each of the manuals.

Manual	Modules or other major pieces
Manufacturing Setup manual	System setup User setup
Manufacturing Core Functions manual	Manufacturing Cards Extensions to Inventory Control Bills of Materials Extensions to Sales Order Processing Sales Configurator Manufacturing Reports
Manufacturing Production Functions manual	Routings Manufacturing Orders Outsourcing Work in Process
Manufacturing Management Functions manual	Quality Assurance Engineering Change Management Job Costing
Manufacturing Planning Functions manual	Sales Forecasting Master Production Scheduling Capacity Requirements Planning (CRP) Material Requirements Planning (MRP)

The online help file includes all of the information in the manuals, except installation information. The online help also includes field-by-field descriptions of the windows. You can access online help by pressing F1 whenever a Manufacturing window is active, or by choosing Help >> About this window.



If a Microsoft Dynamics® GP window—such as the Sales Transaction Entry window—is the active window when you access help, online help for Microsoft Dynamics GP will be displayed. You can close that help, open any Manufacturing window, and try again to access Manufacturing-specific help.

What's in this manual

This manual is designed to give you an understanding of how to use the features of Manufacturing, and how it integrates with the Microsoft Dynamics GP system.

To make best use of Manufacturing, you should be familiar with systemwide features described in the System User's Guide, the System Setup Guide, and the System Administrator's Guide.

Some features described in the documentation are optional and can be purchased through your Microsoft Dynamics GP partner.



To view information about the release of Microsoft Dynamics GP that you're using and which modules or features you are registered to use, choose Help >> About Microsoft Dynamics GP.

The manual is divided into the following parts:

- [Part 1, Manufacturing setup](#), describes how you can set up security and systemwide settings for Manufacturing modules.
- [Part 2, Manufacturing user setup](#), contains information about user preferences—settings that help you customize each user's view of Manufacturing information.

Symbols and conventions

For definitions of unfamiliar terms, see the glossary in the manual or refer to the glossary in Help.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks.

This manual uses the following conventions to refer to sections, navigation and other information.

Convention	Description
<i>Creating a batch</i>	Italicized type indicates the name of a section or procedure.
File >> Print or File > Print	The (>>) or (>) symbol indicates a sequence of actions, such as selecting items from a menu or toolbar, or pressing buttons in a window. This example directs you to go to the File menu and choose Print.
TAB or ENTER	All capital letters indicate a key or a key sequence.

Resources available from the Help menu

The Microsoft Dynamics GP Help menu gives you access to user assistance resources on your computer, as well as on the Web.

Contents

Opens the Help file for the active Microsoft Dynamics GP component, and displays the main “contents” topic. To browse a more detailed table of contents, click the Contents tab above the Help navigation pane. Items in the contents topic and tab are arranged by module. If the contents for the active component includes an “Additional Help files” topic, click the links to view separate Help files that describe additional components.

To find information in Help by using the index or full-text search, click the appropriate tab above the navigation pane, and type the keyword to find.

To save the link to a topic in the Help, select a topic and then select the Favorites tab. Click Add.

Index

Opens the Help file for the active Microsoft Dynamics GP component, with the Index tab active. To find information about a window that’s not currently displayed, type the name of the window, and click Display.

About this window

Displays overview information about the current window. To view related topics and descriptions of the fields, buttons, and menus for the window, choose the appropriate link in the topic. You also can press F1 to display Help about the current window.

Lookup

Opens a lookup window, if a window that you are viewing has a lookup window. For example, if the Checkbook Maintenance window is open, you can choose this item to open the Checkbooks lookup window.

Show Required Fields

Highlights fields that are required to have entries. Required fields must contain information before you can save the record and close the window. You can change the font color and style used to highlight required fields. On the Microsoft Dynamics GP menu, choose User Preferences, and then choose Display.

Printable Manuals

Displays a list of manuals in Adobe Acrobat .pdf format, which you can print or view.

What’s New

Provides information about enhancements that were added to Microsoft Dynamics GP since the last major release.

Microsoft Dynamics GP Online

Opens a Web page that provides links to a variety of Web-based user assistance resources. Access to some items requires registration for a paid support plan.

Customer Feedback Options

Provides information about how you can join the Customer Experience Improvement Program to improve the quality, reliability, and performance of Microsoft® software and services.

Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

To send comments about specific topics from within Help, click the Documentation Feedback link, which is located at the bottom of each Help topic.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Part 1: Manufacturing setup

This part of the documentation includes information that will help you complete Manufacturing setup tasks. You can refer to this information to learn how to use security in Manufacturing and how to set up systemwide settings.

Many of the tasks that are described must be completed before you can enter information in Manufacturing. Be sure to review and complete all setup tasks for Manufacturing modules you've installed. Later you can refer to this information to adjust settings or to help new users get started.

The following information is discussed:

- [Chapter 1, "Manufacturing basic setup,"](#) includes information about setting up users, the shop floor calendar, and work center options.
- [Chapter 2, "Security,"](#) describes security information specific to Manufacturing, such as process security and module security.
- [Chapter 3, "Manufacturing core functions setup,"](#) contains information about system settings for bills of materials, sales extensions, and the Sales Configurator.
- [Chapter 4, "Manufacturing production functions setup,"](#) describes system settings for routings, manufacturing orders, and work-in-process.
- [Chapter 5, "Manufacturing management functions setup,"](#) includes information about setting up quality assurance, engineering change management, and job costing.
- [Chapter 6, "Manufacturing planning functions setup,"](#) includes information about system settings for Material Requirements Planning.

Chapter 1: Manufacturing basic setup

Before you set up module-specific system settings and user preferences, use this information to complete basic system setup tasks.

This information is divided into the following sections:

- [Setup checklist](#)
- [Setting up costing system default settings](#)
- [Shrinkage overview](#)
- [Including shrinkage in Manufacturing](#)
- [Shop calendars](#)
- [Defining the shop calendar](#)
- [Setting up work center options](#)
- [Designating system users](#)

Setup checklist

When you set up Manufacturing, you can open each setup window and enter information, or you can use the Setup Checklist window (Microsoft Dynamics GP menu >> Tools >> Setup >> Setup Checklist) to guide you through the setup process. See your System Setup Guide (Help >> Contents >> select Setting up the System) for more information about the Setup Checklist window.

Registered modules

The Setup Checklist window displays the windows and topics only for modules that are registered. This table lists the modules that must be registered for the listed windows to be displayed in the Setup Checklist window.

Registered module	Windows displayed in the Setup Checklist window
Bills of Materials (BOM)	BOM Preference Defaults BOM Preferences Bill of Materials Entry BOM Routing Link
Capacity Requirements Planning (CRP)	CRP Preferences
Engineering Change Management (ECM)	ECM System Preferences ECM User Preferences
Job Costing (JC)	Job Costing Preference Defaults
Manufacturing Order Processing (MOP)	Shop Calendar Manufacturing Order Preference Defaults Scheduling Preferences Routing Preference Defaults WIP Preference Defaults Work Center Preference Defaults Manufacturing Series Sales Order Preferences Order Fulfillment Setup Routing User Preferences Work Center Setup Machine Definition Labor Code Definition Routing Sequence Entry

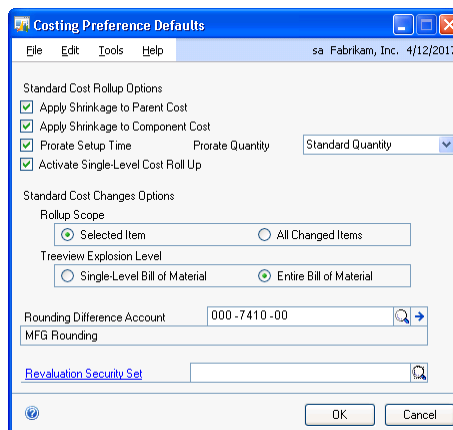
Registered module	Windows displayed in the Setup Checklist window
Material Requirements Planning (MRP)	MRP Preference Defaults MRP Low-Level Codes Purchase Request Resolution User Preferences MRP Preferences
Quality Assurance (QA)	QA Preference Defaults QA User Preferences
Sales Configurator (SC)	Sales Configurator Preferences Option Category Maintenance Item Option Assignment Option Promotion Maintenance
Sales Order Processing (SOP)	Manufacturing Series Sales Order Preference Order Fulfillment Setup Sales Order Processing Setup
Inventory	Process Security Setup Costing Preference Defaults Add Users Roll Up and Revalue Inventory Standard Cost Changes Labor Code/Machine Overhead Defaults Standard Item Material Costs Standard Cost Maintenance Item Price List Maintenance

Setting up costing system default settings

Default costing settings determine how costs are tracked throughout your manufacturing facility. You can choose to automatically account for shrinkage on parent parts, their components, or both. You also can assign a posting account for rounding differences and choose a security set for revaluations.

To set up costing system default settings:

1. Open the Costing Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Costing)



2. Mark the options to apply shrinkage, as needed, for standard cost rollups. For more information about shrinkage in general, refer to [Shrinkage overview](#) on page 12.



It's strongly recommended that you mark both options or neither option. Refer to [Including shrinkage in Manufacturing](#) on page 13.

Apply Shrinkage to Parent Cost Mark Apply Shrinkage to Parent Cost to apply shrinkage to the finished good.

Apply Shrinkage to Component Cost Mark Apply Shrinkage to Component Cost to apply shrinkage to the components of the finished good.

Prorate Setup Time Mark Prorate Setup Time to distribute setup costs for standard-cost items.

3. If you marked Prorate Setup Time, select the quantity to use for calculating setup costs for standard-cost items.

Average Quantity The setup costs of an item (setup time multiplied by setup labor rate) will be divided by the average quantity of the item. You specify the average quantity of an item in the Item Engineering Data window.

Refer to [Entering item engineering data](#) in [Chapter 8, "Item engineering data,"](#) of the Manufacturing Core Functions documentation for more information about specifying the average quantity of an item.

Standard Quantity The setup costs of an item will be divided by the standard quantity of the item. You specify the standard item quantity in the Standard Cost Changes window.

Refer to [Specifying the standard quantity for a finished item](#) in [Chapter 14, "Standard costing revaluations,"](#) in the Manufacturing Core Functions documentation for more information.

4. Mark Activate Single-Level Cost Roll Up to let users decide, in the Standard Cost Changes window, whether costs affect selected items in the BOM, or the entire BOM that includes the item. If you do not mark this option, users do not have the choice, and costs affect the entire BOM that includes the item.
5. Decide how the Standard Cost Changes window should work.

Rollup scope Determines how many items are included in a standard cost rollup. You can choose to roll up all items with proposed standard cost changes, or you can choose to roll up only items affected by a change in the cost of the selected item.

Tree view explosion level Determines how much information is displayed when you select an item in the Standard Cost Changes window. If your business has many records, choose Single Level Bill of Material so that information is displayed more quickly. (You can always expand the view of the information, if needed.)

6. Select a posting account for rounding differences.

7. Choose a security set to be used when a user attempts to revalue items in the Rollup and Revalue Inventory window or in the Standard Cost Changes window.



Refer to [Process security](#) on page 18 for more information.

Users who attempt to revalue items must be included in the security set, or they must enter the appropriate password before the revaluation can occur.

8. Choose OK and close the window.

Shrinkage overview

Shrinkage is the anticipated loss of an item.

Types of shrinkage

You can specify a shrinkage value for finished goods (parent items), for components (child items), or both.

Finished good shrinkage Finished good shrinkage might occur if not all items that are started in production are adequate for meeting demand. For example, if you discover that one out of every 100 finished goods you produce fails inspection, you have one percent shrinkage of your finished goods. You can set up preferences so that if you need to produce 200 of this item, materials and resources will be scheduled to build 202—automatically covering any anticipated losses from shrinkage.

Raw material shrinkage Raw material shrinkage might occur if some components are flawed and can't be used in production. Raw material shrinkage also can occur if materials are wasted in the production process; for example, you might need to use materials on trial runs during your setup processes. You can indicate how much shrinkage you anticipate on an item-by-item basis.

How shrinkage is calculated

To calculate shrinkage, divide the extended required quantity (from either the picklist or the manufacturing order, depending on if you're calculating shrinkage for a component or finished good) by 1, minus the shrinkage percentage. The calculated quantities reflecting shrinkage should be rounded up, if necessary.

Including shrinkage in Manufacturing

When you enter item information in Inventory Control, you can specify shrinkage percentages. The amounts you enter can be reflected in the quantity calculations for manufacturing orders, in cost calculations for standard cost rollups, or both.

Refer to the table for more information about where the shrinkage percentage information comes from, and how it's determined if the shrinkage percentage is reflected in quantities or costs.

	Component	Finished good
Shrinkage information comes from the Item Resource Planning Maintenance window, but you can change the shrinkage percentage for a component when you add the component to a bill of materials in the Bill of Materials Entry window.	... the Item Resource Planning Maintenance window.
Shrinkage is reflected in the quantities if the scheduling preference you use for the manufacturing order includes the options to apply shrinkage to the quantity. Refer to Setting up scheduling preferences on page 32.	
Shrinkage is reflected in costs for standard cost rollups if you've marked options to include shrinkage in standard cost rollups. Refer to Setting up costing system default settings on page 10.	

Shop calendars

You'll use the Shop Calendar window to indicate which days your plant is running—and which days it isn't. You can choose weekends, holidays, or any other days as "down days." When you use modules such as Manufacturing Order Processing, down days can be taken into consideration in order scheduling.

You might have to make specific adjustments to the calendar when unforeseen events occur—when your plant has a down day because of a power failure, for example, or when an extra shift is scheduled.



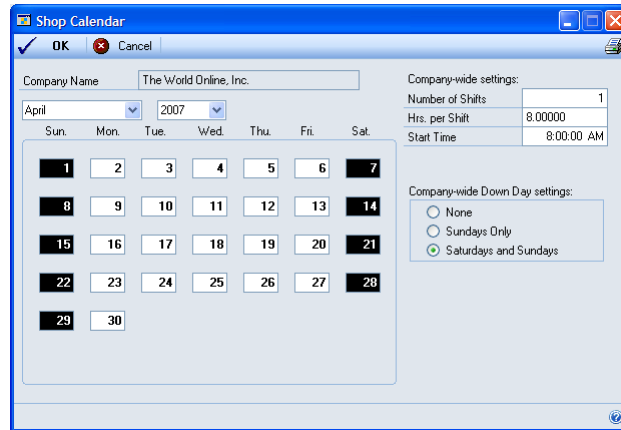
Settings you choose when defining the shop calendar will be the default settings for your work centers. However, after you create work centers, changes to the shop calendar won't be reflected in existing work center calendars. Use the Shop Calendar when you're initially setting up your company, but use work center calendars to make day-to-day adjustments.

Defining the shop calendar

You need to define one shop calendar for each company, but you can adjust the shop calendar for each work center.

To define the shop calendar:

1. Open the Shop Calendar window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Calendar)



The window will open to the current month and year.

2. Enter the number of shifts, hours per shift and start time information.



The number of shifts multiplied by the hours per shift can't exceed 24.

3. Mark the option for weekly down days. You can choose None, Sundays Only, or Saturdays and Sundays.

Down days will appear in black.

4. Mark any other down days. A message will appear, telling you that continuing with the process might affect scheduling. To continue the process, choose Yes.



To make a down day available for scheduling, select the day in the Shop Calendar window to clear the setting.

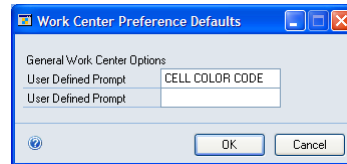
5. Choose OK and close the window.

Setting up work center options

Use work center default options to create two fields that will be linked to routing operation codes. Enter the labels for the fields in the Work Center Preference Defaults window.

To set up work center options:

1. Open the Work Center Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Work Centers)



2. In the User-Defined Prompt fields, enter the label or labels for the additional fields you're creating. These fields will appear in the Operations Setup window.
3. Choose OK.

Designating system users

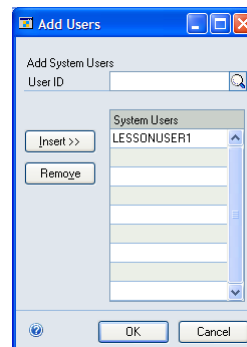
System users have more access privileges than other users. Like system administrators, system users can set preferences for other users.



Before you can designate system users, you must enter user information in the User Setup window. Refer to your System Setup Instructions (Help >> Contents >> select Setting Up the System) for more information.

To designate system users:

1. Open the Add Users window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> System User)



2. Enter or select the user ID for an employee who is to be a system user.
3. Choose Insert.



To remove a system user, mark the user ID in the scrolling window and choose Remove.

4. Continue, repeating steps 2 and 3 to add as many system users as you like.
5. Choose OK and close the window.

Chapter 2: Security

Security builds safeguards into your software to restrict access to information, processes, or windows. In Manufacturing, each of these types of security is included. You should understand each of the three security types before setting up security access for your users.



Before you set up security access for Manufacturing, you should have defined users and determined the level of access each user will have.

This information is divided into the following sections:

- [Manufacturing security types](#)
- [Process security](#)
- [Creating and modifying process security sets](#)
- [Using Manufacturing module security](#)

Manufacturing security types

Refer here for information about some of the terms related to security.

User security You can determine which windows and reports each user in your organization can use. Users can't use any *modified* windows or reports until you give them access to the windows and reports. Window and report security is used throughout your accounting and manufacturing system. To learn more about setting up user security, refer to the System Setup Guide (Help >> Contents >> select Setting up the System).



User security can be used to restrict access only to windows and reports. To restrict access to information on a field-by-field basis, use Field Level Security or create alternate forms and windows. Refer to the Modifier User's Guide for more information about creating alternate forms and windows. Refer to the System Setup Guide (Help >> Contents >> select Setting up the System) for more information about Field Level Security.

Process security Process security is a special type of security that you can use to limit authority for completing special procedures in Manufacturing, such as revaluing inventory or generating manufacturing orders from Sales Order Processing. First, you must define process security sets. A process security set can be based on a list of users who will have authority to complete a specific process, or it can be based on a password. You can create as many process security sets as you like and apply different sets to different processes throughout Manufacturing.



For more information, refer to [Process security](#) on page 18 and [Creating and modifying process security sets](#) on page 18.

Manufacturing module security Some Manufacturing processes—such as generating Material Requirements Planning (MRP) information or updating routing records—can be done only when no other users are working with certain records. With the security that is provided for bills of materials, routings, data collection, and MRP, you can see which other users are using records that prevent you from completing MRP regeneration or other processes. You can end other users' sessions or you can ask them to end their sessions.

You also can use Manufacturing module security to unlock records that might become locked if a user's computer becomes suspended. If a power failure occurs when a user is updating a routing record, for example, the routing record might need to be unlocked.



For more information, refer to [Using Manufacturing module security](#) on page 19.

Process security

Process security is useful for safeguarding certain manufacturing processes, such as revaluing standard cost items or overriding purchase order quantities. With process security in place, you can limit who in your company has authorization to complete certain critical processes.

Manufacturing process security system uses security sets—passwords or groups of user IDs—to limit who can complete certain tasks. When a security set for a task is based on a group of users, only users in that group can perform the task. When a security set for a task is based on a password, any user who attempts to complete the task will be required to enter the appropriate password before proceeding.

You can use process security for completing the following tasks.

- Revaluing inventory
- Linking job elements to jobs
- Changing a sales order line item quantity when a manufacturing order is linked to it
- Changing job links
- Changing the status of a job
- Overriding manufacturing order quantities
- Changing order fulfillment history
- Auto-generating manufacturing orders
- Managing links between manufacturing orders and purchase orders for outsourcing
- Managing shipments to outsourcing vendors
- Updating groups of bills of materials

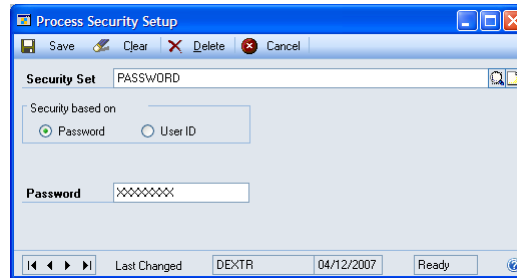
Creating and modifying process security sets

You can create an unlimited number of security sets. You can use the same security set for all tasks that are protected by process security, or you can create a separate security set for each task.

Once you've created a process security set, you can modify it at anytime. For example, you might change the password or add or remove user IDs.

To create or modify process security sets:

1. Open the Process Security Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Process Security)



2. Enter or select a name for the security set.
3. If you're creating a new security set, mark Password or User ID to determine the kind of security set you're creating. If you're modifying an existing security set, skip to step 4.
 - If you marked Password, enter the password.
 - If you marked User ID, use the lookup button on the User IDs field to choose the users to include in the security set.
4. Make changes, as needed.
 - To change a password, select the text in the Password field and enter the new password.
 - To add a user, choose a user in the User IDs field.
 - To remove a user, mark the user ID in the scrolling window and then choose Remove.
5. Choose Save.

Using Manufacturing module security

You can use Manufacturing module security to unlock locked bills of materials, routings, data collection records, manufacturing orders, and MRP-planned orders. You also can use module security to remove MRP users. You might need to unlock records to perform certain processes, such as regenerating MRP information.

The window you'll use to view or unlock locked records will depend on the type of record you're working with.

You need system administrator access to unlock most records. To unlock some records, you must supply the system password to open the window. To unlock other records, you must supply the system password when you choose the Delete button.

To use Manufacturing module security:

1. Open the appropriate window for the type of record to unlock.

Refer to the table for more information.

Type of record	Window and path
Bill of materials	BOM Security window (Transactions >> Manufacturing >> Bill of Materials >> Security)
Routing	Routing Security window (Transactions >> Manufacturing >> Routings >> Security)
Data collection	Data Collection Transaction Security window (Transactions >> Manufacturing >> WIP >> TRX Security)
Manufacturing order	Manufacturing Order Security window (Transactions >> Manufacturing >> Manufacturing Orders >> Security)
MRP	MRP Security window (Transactions >> Manufacturing >> MRP >> Security)
MRP-planned orders	MRP-Planned Order Security window (Transactions >> Manufacturing >> MRP >> MRP Planned Order Security)

2. View the information in the scrolling window. Each of these windows displays the user ID of the person who has locked each record.



It's a good idea to contact the user and request that he or she close the window to unlock a record. If that's not possible, use these windows to end user sessions.

3. Highlight a record to unlock in the scrolling window.
4. Choose Delete.
5. Repeat steps 3 and 4 to unlock as many records, as needed.
6. When you've finished, close the window.

Chapter 3: Manufacturing core functions setup

Information about setting up system settings for use with core functions modules—Bills of Materials, Sales Configurator, and extensions to Microsoft Dynamics GP Sales Order Processing—is included here. You must set up system and user settings to determine how Manufacturing will function for your business.

This information is divided into the following sections:

- [Setting up bills of materials system settings](#)
- [Phantom items as components of phantom items](#)
- [Setting up Sales Configurator options](#)
- [Setup options for sales order extensions](#)
- [Setting up manufacturing sales order due dates](#)
- [Setting up manufacturing orders for sales orders](#)
- [Setting up order fulfillment options](#)

Setting up bills of materials system settings

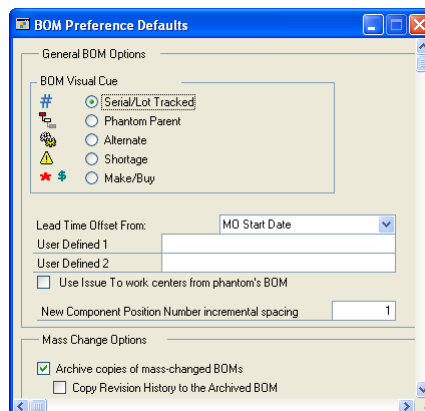
System settings for Manufacturing Bill of Materials help you to accomplish several tasks. Refer to the table for more information.

Task	Required?
Specify whether component lead time should be calculated based on the manufacturing order start date or the manufacturing order due date.	Yes
Select the visual cues for the Bill of Materials Entry window and the Bill of Materials View window. (This can be changed on a user-by-user basis.)	No
Set up user-defined fields for bills of materials.	No
Specify whether site information for building a phantom subassembly item will be based on the phantom item's bill of materials or the finished goods' bill of materials.	No
Specify options for mass-changing bills of materials.	No

You'll use the BOM Preference Defaults window to complete these tasks.

To set up bills of materials system settings:

1. Open the BOM Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Bill of Materials)



- Specify which visual cue should be used by default in the Bill of Materials Entry window and the Bill of Materials View window.

Each user can choose a different visual cue, if needed.

- Choose the date that should be used to calculate component lead time dates. This selection determines how lead times are calculated for all components and can't be changed on a per-user basis.

For more information about lead time offsets, refer to [Lead time calculations](#) in [Chapter 9, "Bill of Materials overview,"](#) in the Manufacturing Core Functions documentation.

- You can enter labels for user-defined fields, if needed.

Later, you can add information in the user-defined fields in the Bill of Materials Entry window. You can enter information for each component in each bill of materials. Refer to [Changing component details](#) in [Chapter 11, "Bill of Materials entry,"](#) in the Manufacturing Core Functions documentation for more information.

- To specify how the issue-to site for components of phantom items are determined, you can use the Use Work Centers from the phantom's BOM option.

Refer to the table for more information.

	Option is marked	Option is unmarked
Phantom item has no issue-to site in the finished goods' bill of materials	The issue-to site for components of the phantom item comes from the phantom item's bill of materials.	
Phantom item has an issue-to site in the finished goods' bill of materials	The issue-to site for components of the phantom item comes from the finished good's bill of materials.	The issue-to site for components of the phantom item are comes from the phantom item's bill of materials.

Refer to [Phantom items as components of phantom items](#) on page 23 for examples of how the rules are applied when a manufacturing order for a phantom item includes phantom components.

- To specify the default spacing between position numbers, enter a number in the New Component Position Number Incremental Spacing field.

We recommend that you leave a few spaces in between position numbers to allow room to add more position numbers later. Refer to [Chapter 10, "Position numbers,"](#) in the Core Functions manual for more information.

- Mark the Archive copies of mass-changed BOMs option to keep a copy of the original bill of materials each time a bill of materials is changed using the BOM Mass Updates window.
- If you marked Archive copies of mass-changed BOMs, you also can specify whether the revision history for the bill of materials should be archived. Mark Copy Revision History to the Archived BOM if revision history also should be stored.

- Mark the bill of materials types that should not be included when changing bills of materials using the BOM Mass Updates window. You can choose to exclude Manufacturing, Engineering, Configured, or Super bill of materials types from mass changes.

For example, if you mark Engineering, Engineering will be marked in the Exclude BOM types from mass changes option in the BOM Mass Updates window and you will need to unmark it to change an engineering bill of materials.

- You can enter or select a process security set if use of the BOM Mass Updates window should be limited to a certain group of users or should require a password.

Refer to [Process security](#) on page 18 for more information.

- Choose OK and close the window.

Phantom items as components of phantom items

If you're going to create manufacturing orders for phantom subassembly items that include phantom subassemblies, rules for determining the sites for the components will depend on whether you marked the Use Work Centers of phantom's BOM in the BOM Preference Defaults window.

Refer to the following examples for more information.

Bills of materials

For these examples, assume that the following is your bill of materials for the finished good. Note that it includes a phantom subassembly item that has its own phantom subassembly item.

Finished good			
	Phantom 1		Issued to work center 100
		Component A	Issued to work center 200
	Phantom 2		Issued to work center 300
		Component B	Issued to work center 400
		Component C	Issued to work center 400

Example 1

If Use Work Centers of phantom item's BOM is marked, the picklist for the manufacturing order to build Phantom 1 would include the following information:

- Component A would be issued to work center 200
- Component B would be issued to work center 400
- Component C would be issued to work center 400

Example 2

If Use Work Centers of phantom item's BOM is not marked, the picklist for the manufacturing order to build Phantom 1 would include the following information:

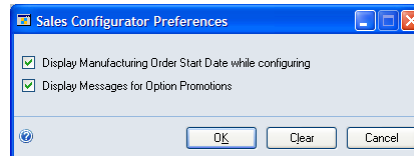
- Component A would be issued to work center 100
- Component B would be issued to work center 300
- Component C would be issued to work center 300

Setting up Sales Configurator options

Use Sales Configurator preferences to determine how Sales Configurator will work for your business and how its use will affect other modules.

To set up Sales Configurator options:

1. Open the Sales Configurator Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Sales Configurator)



2. Mark Display Manufacturing Order Start Date while configuring if a start date for the associated manufacturing orders should be created automatically.

When you open the Sales Configurator window from the Sales Item Detail window, a manufacturing order automatically will be generated. If you've marked this option, a start date for the order will be calculated and included. If you don't mark this option, a start date won't be calculated until you choose Schedule in the Sales Configurator window.

3. Mark Display Messages for Option Promotions to see messages about special promotions for the options you're using as you're working with the Sales Configurator.
4. Choose OK and close the window.

Setup options for sales order extensions

Microsoft Dynamics GP Sales Order Processing includes tools you can use to manage sales functions in your manufacturing environment. However, when you install Manufacturing you also must complete additional setup tasks that determine how sales affect other modules. For example, you must specify default settings for manufacturing orders that will be generated automatically from sales orders.

When Manufacturing is installed, you must complete the following setup procedures:

Due date options You must specify how due dates for manufacturing orders linked directly to sales orders should be calculated. Refer to [Setting up manufacturing sales order due dates](#) on page 25 for more information.

Manufacturing order options To automatically generate manufacturing orders from sales orders, you must specify the default settings for those manufacturing orders. You also can specify whether customer priority levels should affect the priority levels of manufacturing orders generated from sales orders. Refer to [Setting up manufacturing orders for sales orders](#) on page 26 for more information.

Order fulfillment options To track additional information about how orders are fulfilled, you must set up order fulfillment options. You can specify a default

carrier and FOB point. You also can select options so users can modify the freight and miscellaneous charges associated with order fulfillment. Refer to [Setting up order fulfillment options](#) on page 27 for more information.



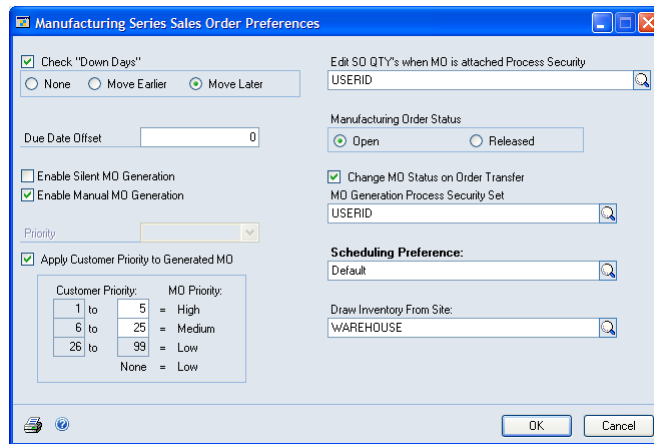
For more information about sales order processing and setup, refer to the *Sales Order Processing* documentation.

Setting up manufacturing sales order due dates

Use the Manufacturing Series Sales Order Preferences window to specify how due dates for sales orders will be calculated.

To set up manufacturing sales order due dates:

1. Open the Manufacturing Series Sales Order Preferences window. (Microsoft Dynamics GP menu >> Tools >> Setup >> Sales >> Sales Order Processing >> Additional >> Manufacturing Sales Order Prefs)



2. To be warned when you schedule a sales order due date on a date that is a company-wide down day, mark Check “Down Days.” You also can specify how the alternate date for the sales order should be calculated.

None Mark None if a new due date shouldn’t be assigned.

Move Earlier Mark Move Earlier to assign the closest preceding open date.

Move Later Mark Move Later to assign the closest following open date.

3. Enter the number of days the in-house due date for the order should precede the requested ship date.

The in-house due date must be on or before the Requested Ship Date, and the Requested Ship Date must be on or before the Customer Promise Date.

- If the in-house due date should be a certain number of days before the requested ship date, enter the number of days in the Due Date Offset field.
- If the in-house due date should be the same as the requested ship date, leave the Due Date Offset field blank.

4. You can continue setting up Manufacturing sales order options by completing [Setting up manufacturing orders for sales orders](#) on page 26, or you can choose OK and close the window.

Setting up manufacturing orders for sales orders

Use the Manufacturing Series Sales Order Preferences window to enter default settings for manufacturing orders that are generated automatically from sales order entries. Manufacturing orders created from sales orders automatically are scheduled, and their picklists are built.

To set up manufacturing orders for sales orders:

1. Open the Manufacturing Series Sales Order Preferences window. (Microsoft Dynamics GP menu >> Tools >> Setup >> Sales >> Sales Order Processing >> Additional >> Manufacturing Sales Order Prefs)
2. To allow users to create manufacturing orders during the sales order entry process, determine the level of user action you'll require from the users.

Refer to [Manufacturing orders generated from sales](#) in [Chapter 20, "Sales order entry,"](#) in the Manufacturing Core Functions documentation for information about how the fulfillment method for an item and this setting affect how Manufacturing handles back-order quantities.

Enable Silent MO Generation Mark this option to automatically generate manufacturing orders when sales orders are entered for item quantities that are greater than what is currently in stock.

Enable Manual MO Generation Mark this option to allow users to generate manufacturing orders. If you mark this option, users will need to provide basic information for the manufacturing order.

3. Set the Priority list to reflect the priority level for automatically generated manufacturing orders. The priority level is reference only and won't affect scheduling.
4. Mark Apply Customer Priority to Generated MO if you're using customer priority levels and the priority level that you've assigned to customers should affect the priority of manufacturing orders generated from sales orders.

If you mark the option, specify how customer priorities should be translated to manufacturing order priorities.



You can specify a customer's priority level in the Customer Maintenance window (Cards >> Sales >> Customer). For more information, refer to Microsoft Dynamics GP Sales Order Processing documentation.

5. To limit user access for changing sales order quantities for sales orders that have associated manufacturing orders, enter or select a process security set in the Edit SO QTYs when MO is Attached Process Security field.

This option allows you to override back-ordered, canceled, invoiced and billed quantities so the quantities can equal the quantity ordered or invoiced. For example, suppose a customer has ordered 1,000 widgets and you want to ship

the 500 widgets that have been built so far. If you use this option, you can handle partial shipments.



If you don't select a process security set but try to adjust a sales order quantity for a sales order with an associated manufacturing order, a message will warn you that you don't have the appropriate access privileges to change the sales order quantity.

6. Mark the default order status for automatically generated manufacturing orders. You can choose Open or Released. You can change the order status for specific manufacturing orders.



Refer to [Manufacturing order statuses](#) and [How statuses limit activities](#)—both in [Chapter 6, “Manufacturing order overview,”](#) in the Manufacturing Production Functions documentation—for more information.

7. Mark Change MO status on Order Transfer to change the status of a manufacturing order when the status of the associated sales order changes from Quote to Order.
8. To limit authority for generating manufacturing orders, enter or select a MO Generation Process Security Set.



For more information about process security sets, refer to [Process security](#) on page 18 and [Creating and modifying process security sets](#) on page 18.

9. Enter or select a default scheduling method for automatically generated manufacturing orders. You can change the scheduling method for a manufacturing order.



For more information about creating scheduling methods, refer to [Setting up scheduling preferences](#) on page 32.

10. Enter or select the default inventory site from which items for the manufacturing order will be drawn. You can change the Draw Inventory From Site for a manufacturing order.
11. Choose OK and close the window.

Setting up order fulfillment options

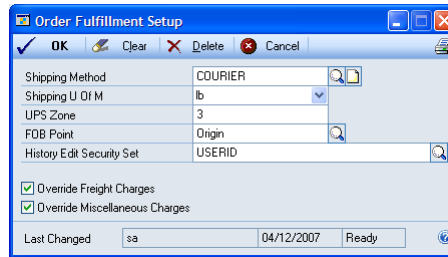
Manufacturing extends the order fulfillment options that are available through Sales Order Processing. Use the Order Fulfillment Setup window to set up Manufacturing-specific order fulfillment features.



Besides setting up these system preferences, you must be sure other sales order type and item options are in place. Refer to [Requirements for order fulfillment history](#) in [Chapter 21, “Order fulfillment,”](#) in the Manufacturing Core Functions documentation for more information.

To set up order fulfillment options:

1. Open the Order Fulfillment Setup window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Sales >> Sales Order Processing >> Additional >> Order Fulfillment Setup)



2. Enter or select the default shipping method.
3. Select the default unit of measurement from the Shipping U of M list.
4. Enter the default UPS zone.
5. Enter or select the default FOB point.
6. To restrict authority for editing fulfillment history records, enter or select a process security set in the History Edit Security Set field.



Refer to [Process security](#) on page 18 for more information about process security sets.

7. Mark Override Freight Charges so users can enter freight charges in the Freight and Misc Adjustments window.
8. Mark Override Miscellaneous Charges so users can enter miscellaneous charges in the Freight and Misc Adjustments window.
9. Choose OK and close the window.

Chapter 4: Manufacturing production functions setup

This documentation includes information about setting up system settings for use with production functions modules: Routings, Manufacturing Order Processing, Outsourcing, and Work in Process. You'll need to set up system and user settings to determine how Manufacturing will function for your business.

This information is divided into the following sections:

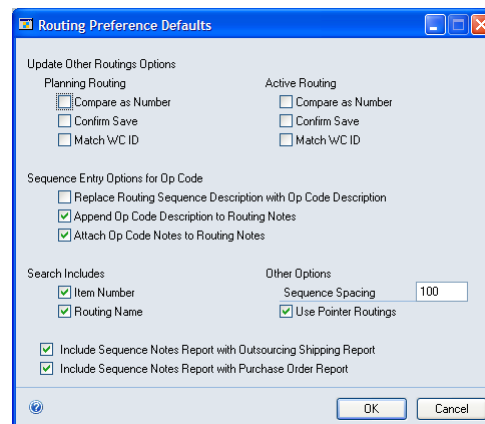
- [Setting up routing update options](#)
- [Setting up sequence entry options](#)
- [Setting up sequence spacing, notes, and pointer usage](#)
- [Scheduling preferences](#)
- [Setting up scheduling preferences](#)
- [Setting up additional scheduling method options](#)
- [Setting up manufacturing order processing](#)
- [Specifying outsourcing manufacturing order options](#)
- [Setting up data collection options](#)
- [Setting up options for outsourcing costs](#)
- [Rules for outsourcing setup changes](#)

Setting up routing update options

Routing update options compare planning routings—those that are used to determine resource requirements for potential manufacturing orders—and active routings—those that are used on the production floor to manufacture goods. The planning routing can be converted to an active routing and tied to a manufacturing order.

To set up routing update options:

1. Open the Routing Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Routings)



2. Determine how planning routings should be updated.

Compare as Number If all planning routing sequence numbers are numeric, mark Compare as Number.

Confirm Save To have a confirmation message displayed before planning routing updates are changed, mark Confirm Save.

3. Determine if updating other planning routings should be based only on the routing name and sequence number. Whether a routing update is reflected in other routings is always determined by the routing name and sequence number. Those two criteria must match before a change in one routing sequence is reflected in a sequence in another routing.
 - If you mark Match WC ID, the routing sequence change will be reflected in only routing sequences that have the same routing name, sequence number and work center.
 - If you don't mark Match WC ID, all routings with that routing name and sequence number will be updated, regardless of the work center ID.
4. Determine how to update active routings.

Whether a routing update is reflected in other routings is always determined by the routing name and sequence number. Those two criteria must match before a change in one routing sequence is reflected in a sequence in another routing.

- If you mark Match WC ID, the routing sequence change will be reflected in only those routing sequences that have the same routing name, sequence number and work center.
 - If you don't mark Match WC ID, all routings with that routing name and sequence number will be updated, regardless of the work center ID.
5. Mark one or both search options for your routing records.
 - If you mark Item Number, searches of routing records will return only routings that include the item number you specify.
 - If you mark Routing Name, searches of routing records will return only the routing that has the name you specify.
 6. Choose OK.

Setting up sequence entry options

If you print routing information for use on the production floor, you can use sequence entry options to ensure that information your employees need is included on the reports.

To set up sequence entry options:

1. Open the Routing Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Routings)
2. Mark Replace Routing Seq. Descr. with WC Descr. to see work center descriptions rather than routing sequence descriptions.
3. Mark Append WC Description to Routing Notes to have the work center description added to the routing notes.

4. Mark Attach WC Notes to Routing Notes to have the work center notes added to the routing notes.
5. Choose OK.

Setting up sequence spacing, notes, and pointer usage

Use the Routing Preference Defaults window to set up options for sequence number spacing, to specify if routing sequence notes should be included with certain reports, and to determine if pointer routings can be used in your facility. Pointer routings are template routings you can use in your regular routings to describe how to complete routine tasks, such as packaging and shipping products.

To set up sequence spacing, notes and pointer usage:

1. Open the Routing Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Routings)
2. Enter the default spacing for routing sequence numbers. For instance, if sequence steps should be numbered 10, 20, 30 and so on, the Sequence Spacing would be 10.



We recommend using spacing intervals of 10 or 100. This makes it easier to insert a new sequence between two existing sequences.

3. Mark Use Pointer Routings to use pointer routings in your system.



*Refer to [Pointer routings](#) in [Chapter 5, "Pointer routings,"](#) in the *Manufacturing Production Functions* documentation for more information about pointer routings.*

4. To include routing sequence notes with the shipping report that accompanies items shipped to an outsourcing vendor, mark Include Sequence Notes Report with Outsourcing Shipping Report.
5. To include routing sequence notes with the purchase order that is created to purchase outsourced services, mark Include Sequence Notes Report with Purchase Order Report.
6. Choose OK.

Scheduling preferences

Use the Scheduling Preferences window to create scheduling preferences. Each scheduling preference includes information about scheduling manufacturing orders and handling material issues such as applying shrinkage, posting transactions and closing manufacturing orders.

Unlike options you set up in other user preferences windows in Manufacturing, scheduling methods you define here can be used throughout the system by any user who has authority to open and schedule manufacturing orders.

End Item/Raw Material Issue Use the Scheduling Preferences window to determine if shrinkage percentages are applied to raw materials and finished item quantities. You'll also choose the default inventory site accounts that raw materials will be drawn from and finished goods will be posted to. The default sites will have precedence over any default site that you select in the Item Quantities Maintenance window.

Scheduling Options Use Scheduling Options to determine how the amount of time estimated to complete a manufacturing order should be calculated. If the option is unmarked, the end quantity of the manufacturing order is multiplied by the per-piece cycle time to determine the estimated time to complete the manufacturing order. If the option is marked, the starting quantity is used to determine the estimated time to complete the manufacturing order.

Closing Options If you're using configured bills of materials (generated through the Sales Configurator), use these options to determine what happens to the configured bills of materials you create when the associated manufacturing orders are closed. You can archive the configured bills of materials—move them to another directory for storage, you can delete the configured bills of materials from the list of "active" bills of materials, or you can do both.

Process Security To require special authorization to override the minimum and maximum manufacturing order size, you can select a process security set to restrict authority for this process.

Setting up scheduling preferences

Use the Scheduling Preferences window to define different scheduling methods for your products. You also can use this window to choose the default scheduling method.

When you create a scheduling preference, you can determine how shrinkage percentages are applied to manufacturing orders that use that scheduling preference. You can choose from the following available options:

Apply Shrinkage to End Item Starting Quantity Ending quantities for manufacturing order finished goods should reflect shrinkage amounts.

Doing this will help to ensure that the number of finished goods you get from a manufacturing order reflects the anticipated shrinkage of the finished goods during the manufacturing process. For instance, an electronics component manufacturer might know that she can expect to have 3% shrinkage when a certain widget is produced; that is, to make 100 widgets, she'll have to plan to make 103 widgets, to cover the expected shrinkage. Refer to [Shrinkage overview](#) on page 12 and [Including shrinkage in Manufacturing](#) on page 13 for more information.

Apply Shrinkage to Raw Material Issue To ensure that sufficient materials are issued to manufacturing orders to reflect component item shrinkage amounts.

Doing this will help to ensure that the amounts of raw materials you issue to manufacturing orders will reflect the anticipated shrinkage of the components. For example, an electronic components manufacturer might know that she can expect 2% shrinkage for a certain component. That is, she knows that for every 100 components she issues for use in a manufacturing order, two will be unsuitable for some reason. Refer to [Shrinkage overview](#) on page 12 and [Including shrinkage in Manufacturing](#) on page 13 for more information.



You also must define other aspects of each scheduling method, such as auto-posting and process security preferences. Refer to [Setting up manufacturing order processing](#) on page 34 and [Creating and modifying process security sets](#) on page 18 for more information.

To set up scheduling preferences:

1. Open the Scheduling Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MO Schedule Prefs)



2. Enter the name of the scheduling preference.
3. If this scheduling preference is to be the default scheduling preference, mark Default. You can specify only one default scheduling method. The default scheduling method will be the default scheduling preference for each manufacturing order you create, but you can select a different scheduling preference, if needed.

If you're using quick manufacturing orders, you must specify a default scheduling method.

4. Determine how to deal with item usage issues.
5. Choose a default inventory site to draw inventory from for manufacturing orders scheduled with this scheduling preference.
6. Choose a default inventory site to post inventory to when manufacturing orders are closed.
7. Choose Save.

Setting up additional scheduling method options

Use the Scheduling Preferences window to set up additional options that affect how your material requirements are calculated. You also can specify how configured bills of materials will be handled after their associated manufacturing orders are closed. The window also includes an option for using process security to enforce manufacturing order quantities.

To set up additional scheduling method options:

1. Open the Scheduling Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MO Scheduling Prefs)
2. Enter or select a scheduling preference.
3. Mark the closing options that reflect how the configured bills of materials should be handled. You can mark either or both options.



Complete this step only if you're using the Manufacturing Series Sales Configurator.

Archive (if possible) Configured BOM Saves the configured bill of materials in an archive.

Delete Configured BOM when MO is closed Deletes configured bills of materials after their associated manufacturing orders are closed.

4. Set process security to limit users' abilities to override the minimum or maximum manufacturing order sizes.
 - To use an existing process security set, choose the Process Security lookup button and select the appropriate set.
 - To create a new process security set to restrict users' access to this process, enter the name of the new process security set in the Process Security field. A message will be displayed and you'll have the option to create a new set. Choose yes.



Refer to [Creating and modifying process security sets](#) on page 18.

5. Mark the Schedule Manufacturing Order Start QTY option to calculate the estimated time needed to complete a manufacturing order based on the start quantity of the manufacturing order. If you don't mark this option, the estimated time will be calculated based on the end quantity of the manufacturing order.
6. Select a default scheduling method. This scheduling method—Forward Infinite or Backward Infinite—will be used when the scheduling preference is used for manufacturing orders you enter in the Manufacturing Order Entry window.



Manufacturing orders that are generated—for example, manufacturing orders that are suggested by MRP processing—always use backward infinite scheduling because they are created based on a due date rather than on a start date.

7. Choose Save and close the window.

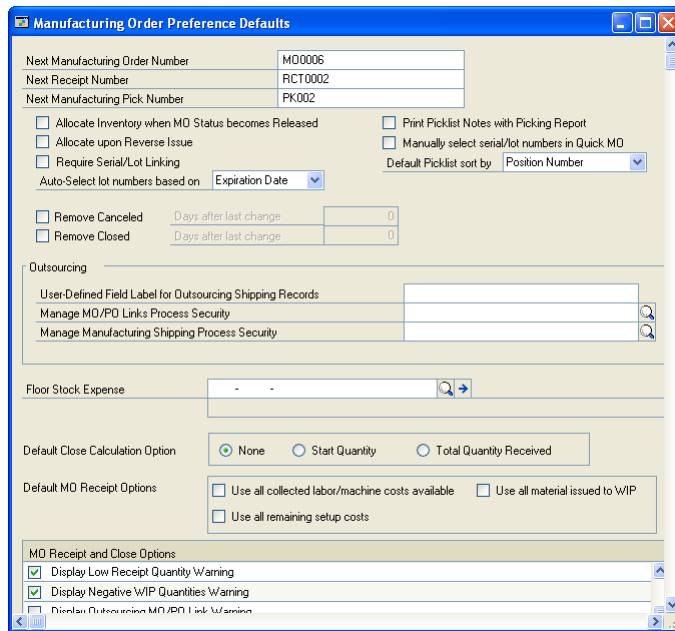
Setting up manufacturing order processing

Use the Manufacturing Order Preference Defaults window to enter information that's used when you work with manufacturing orders. For example, you can specify a beginning number for your manufacturing orders, determine how configured bills of materials will be handled, and determine how default values are calculated when you close a manufacturing order.

You also can use the window to set up process security for tasks related to outsourcing and to set up an extra field for tracking outsourcing information. Refer to [Specifying outsourcing manufacturing order options](#) on page 38 for more information.

To set up manufacturing order processing:

1. Open the Manufacturing Order Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Manufacturing Orders)



2. Enter beginning identifiers for manufacturing orders, for receipts, and for pick documents. You can use letters and numbers.

The identifiers are the next default identifiers, and also are the basis of future identifiers. For example, if you enter MO001, the next order will automatically be numbered MO002, then MO003, and so on.

3. Select options for component allocations.
 - If components should be allocated when the manufacturing order status is Released, mark the Allocate Inventory when MO Status becomes Released option.

If you mark the option to allocate components automatically when the status of manufacturing order is changed to Released, component transactions automatically are created. You can use the Manufacturing Component Transaction Inquiry window to view information about the allocations. Refer to [Viewing component transaction information](#) in [Chapter 12, "Manufacturing order inquiries,"](#) in the Manufacturing Production Functions documentation for more information.

Special rules apply if you mark this option and there are shortages of some components when you change the status of a manufacturing order to Released. Refer to [Component shortages and automatic allocations](#) in [Chapter 7, "Manufacturing order entry,"](#) in the Manufacturing Production Functions documentation for more information.
 - If component items should remain allocated when a reverse issue transaction is posted, mark Allocate upon Reverse Issue. (This means that if you reverse-issue components, the component quantities will remain allocated. You can then reverse-allocate them later, if needed.)
4. To print notes attached to the picklist with the picking report, mark Print Picklist Notes with Picking Report.
5. Mark Manually select serial/lot numbers in Quick MO if you want to choose the serial and lot numbers of components used for quick manufacturing orders.
6. Mark Require Serial/Lot Linking to require that all serial-numbered component items and all lot-numbered component items are linked to the serial-numbered or lot-numbered finished good item.

If you mark the Require Serial/Lot Linking option, you must link all available serial-numbered and lot-numbered component items to a finished good in the Manufacturing Serial/Lot Link Entry window before posting.

7. Specify whether lot numbers should be selected automatically by date received or expiration date. The default option is Expiration Date.

Date Received Mark this option to have lot numbers selected automatically in the order that the items were received.

Expiration Date Mark this option to have lot numbers selected automatically in order of their expiration dates.

8. Specify how to handle information about canceled and closed manufacturing orders.

Remove Canceled Mark this option to set up a default entry for removing canceled orders. If you mark this option, the Canceled Orders option will be marked when you use the Remove Manufacturing Orders window. The number of days you enter will be used to calculate the Last Change Date in the Remove Manufacturing Orders window.

Remove Closed Mark this option to set up a default entry for removing closed manufacturing orders. If you mark this option, the Closed Orders option will be marked when you use the Remove Manufacturing Orders window. The number of days you enter will be used to calculate the Last Change Date in the window.

9. Determine how default quantities for manufacturing orders should be calculated when you close a manufacturing order. You can choose to have default quantity calculated based on the original manufacturing order start quantity or the total quantity received. To decide on a case-by-case basis for each manufacturing order, mark None.

For more information, refer to [How required quantities are calculated](#) in [Chapter 6, "Manufacturing order overview,"](#) in the Manufacturing Production Functions documentation.

10. Specify options for closing manufacturing orders. Mark the appropriate options in the scrolling window at the bottom of the window.

Refer to the table for more information about the effect of each option.

Option	Effect
Allow Negative WIP Quantities	To be able to apply more labor, machine or material costs to a manufacturing order than already exist in WIP for the order, mark this option. This can be helpful if you want to enter labor and machine costs for an actual-cost finished good but don't want to backflush those costs or do data collection. If your company is an average cost environment, be sure this option is not marked. Negative inventory should not be allowed in that case.
Delete Configured BOM when MO is closed	A configured bill of materials automatically is removed when the associated manufacturing order is closed. (Deleted bills of materials can't be retrieved later.)
Archive (if possible) Configured BOM when MO is closed	A configured bill of materials automatically is archived when the associated manufacturing order is closed. (Archiving should be possible unless another bill of materials already has been archived for the manufacturing order.) You can retrieve an archived bill of materials, if needed.
Display Low Component Backflushing Warning	If quantities of a backflushed component aren't sufficient for a manufacturing order, a message is displayed.
Display Low Component Issued Warning	If you're closing a manufacturing order and the issued quantity of a component (other than a backflushed component) is less than the required quantity, a message is displayed.
Display Material Remaining in WIP Warning	If you're closing a manufacturing order and there are component costs remaining in WIP, a message appears.
Display Labor/Machine Costs Remaining in WIP Warning	If you're closing a manufacturing order for an actual cost item (one with a perpetual valuation method), a message appears if there are labor or machine costs in WIP for the order.
Display Unused Allocated Material Warning	If you're closing a manufacturing order and an allocated (but not issued) quantity remains, a message appears.
Display Labor/Machine Incomplete Warning	If you're closing a manufacturing order and there are sequences that aren't marked "Done," a message appears.

Option	Effect
Display Low Receipt Quantity Warning	Displays a message if you're closing a manufacturing order and the total of all receipts for the manufacturing order is less than the end quantity that was specified when the manufacturing order was created.
Display Negative WIP Quantities Warning	Displays a message if the consumption of a component makes the WIP quantity of an item negative.
Display Negative Available Quantities Warning	Displays a message when the quantity to consume or the quantity to backflush makes the on hand quantity of a component negative.
Display Outsourcing MO/PO Link Warning	Displays a message if you attempt to void or cancel a purchase order that is linked to a manufacturing order for the purchase of outsourced services.

11. Choose OK.

Specifying outsourcing manufacturing order options

If you're using outsourcing—if your manufacturing processes include steps or services provided by outside vendors—then you can use the Manufacturing Order Preference Defaults window to set up a label for a user-defined outsourcing field and to specify process security sets for outsourcing tasks.

- You can specify a process security set for managing links between manufacturing orders and purchase orders created to purchase outsourced services.
- You can specify a process security set for managing shipping information.



Refer to [Process security](#) on page 18 for more information.

Use the Manufacturing Order Preference Defaults window to select process security sets and to set up a field for tracking additional information for shipments to outsourced vendors.

To specify outsourcing manufacturing order options:

1. Open the Manufacturing Order Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Manufacturing Orders)

2. To track additional information for shipments to outsourcing vendors, enter a label in the User-Defined Field Label for Outsourcing Shipping Records.

Later on, you can make entries in the field in the Manufacturing Shipments window or the Manufacturing Shipments by Vendor window.

3. Enter or select a process security set for managing links between manufacturing orders and purchase orders.
4. Enter or select a process security set for managing shipments to outsourcing vendors.
5. Choose OK.

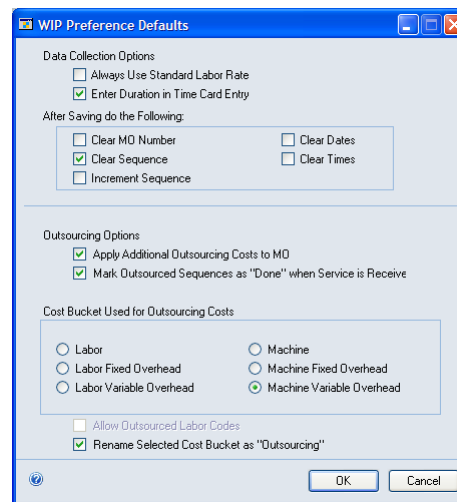
Setting up data collection options

Work In Process (WIP) focuses on data collection. You can use the WIP Preference Defaults window to set up default options for data collection tasks.

Most of the data collection options you select in this window are default options—users also can set their own preferences, based on their user IDs. The outsourcing options, however, are company-wide and cannot be changed on a user-by-user basis.

To set up data collection options:

1. Open the WIP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> WIP)



2. Mark Always Use Standard Labor Rate if costs associated with a job should reflect the standard labor rate rather than the specific labor rate for each employee.
3. Mark Enter Duration in Time Card Entry if most users will enter time for manufacturing order routing sequences in terms of hours and minutes, rather than start and stop times.

Marking this option doesn't limit users in how they enter their time. The option is the default setting for the Enter Duration Hours/Minutes option in the Time Card Entry window. Users can mark or clear that option to enter time information in either format.

4. Mark Clear MO Number to clear the manufacturing order number each time you save a data collection record.
5. Mark Clear Sequence to clear the sequence number each time you save a data collection record.
6. Mark Increment Sequence to display the sequence number for the next sequence in the selected routing each time you save a data collection record.
7. Mark Clear Dates to clear dates each time you save a data collection record.

8. Mark Clear Times to clear times each time you save a data collection record.
9. Choose OK.

If you're not using outsourcing, this is the only procedure you must complete in this window. If you are using outsourcing, you must also complete the procedure described in [Setting up options for outsourcing costs](#) on page 40.

Setting up options for outsourcing costs

Use the WIP Preference Defaults window to specify how outsourcing costs will be tracked for your company. You don't need to complete this procedure unless your manufacturing processes include outsourced services.

To set up options for outsourcing costs:

1. Open the WIP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> WIP)
2. Mark Apply Additional Outsourcing Costs to MO if additional costs for outsourcing should be applied to manufacturing orders that include outsourcing.

If you mark this option, additional costs—trade discount, tax, freight and miscellaneous charges—will be debited to the finished goods account for the manufacturing order, and credited to the inventory offset account.

3. Mark Outsourced Sequences as "Done" when Service is Received if data collection records should reflect that a sequence is complete when you receive items from the outsourcing vendor.
4. Select the cost bucket to be used to track outsourcing costs.



*If possible, choose a cost bucket that isn't usually used by your company. Refer to [Outsourcing cost buckets](#) in [Chapter 15, "Outsourcing overview,"](#) of the *Manufacturing Production Functions* documentation for more information.*

5. If you selected a labor cost bucket, mark Allow Outsourced Labor Codes.
6. Mark Rename Selected Cost Bucket as "Outsourcing" to have the word "Outsourcing" replace the usual name of the cost bucket in windows and reports.
7. Choose OK.

Rules for outsourcing setup changes

It is possible to change some setup options for outsourcing features. However, you should be aware of these rules:

- You cannot change from a labor cost bucket—Labor, Labor Fixed Overhead or Labor Variable Overhead—to a machine cost bucket, as long as your system includes labor code definitions that have been specified for outsourcing.

If you have labor codes designated for outsourcing, you must delete them before you can change the cost bucket. Further, you cannot delete any labor code that exists on a planning routing or as part of a manufacturing order that hasn't been closed.

- If you change from a machine cost bucket—Machine, Machine Fixed Overhead or Machine Variable Overhead—to a labor cost bucket, a message will be displayed if any planning routing or working routing for an unclosed manufacturing order includes an outsourced sequence. The message will suggest that you review and update those routings.
- If transactions for outsourcing costs have been saved, those transaction amounts will be posted to the accounts associated with the cost bucket that was selected when the transactions were saved.

For example, suppose you were using the Machine cost bucket for outsourcing costs, and that you had saved transactions for outsourcing costs. If you then changed to use the Labor cost bucket, the transactions would still be posted to accounts for Machine costs.

Chapter 5: Manufacturing management functions setup

This documentation includes information about setting up system settings for use with management functions modules: Quality Assurance, Engineering Change Management and Job Costing. You'll need to set up system and user settings to determine how Manufacturing will function for your business.

This information is divided into the following sections:

- [Setting up Quality Assurance](#)
- [ECM system settings](#)
- [Setting engineering change system settings](#)
- [Specifying modules for ECM warnings](#)
- [Job Costing system preferences](#)
- [Defining Job Costing system settings](#)

Setting up Quality Assurance

To set up Quality Assurance, you must define the default Quality Assurance (QA) site. If an item requires incoming inspection—if the Receive Purchase Orders to QA Site option is marked for the item in the Item Engineering Data window—the receipt will be to the QA site you select, regardless of the site that's originally entered on the purchase order. If the items meet quality requirements, you must complete an inventory transfer transaction to move the items from the quality assurance site to inventory. Items that don't require inspection will be posted to inventory as soon as they are received.

You also can specify the next numbers to be used for Non-Standard Reports (NSRs) and for Supplier Corrective Action Requests (SCARs).

If you're using multiple bins, items are posted to the default purchase order receipts bin—either for the site or for the item-site combination—when they are received and require inspection.



Before you begin this procedure, be sure that the site you're designating as the quality assurance site has already been defined. Refer to Inventory Control documentation for more information.

To set up Quality Assurance:

1. Open the QA Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> QA)

QA Site ID	INSPECTION
Next NSR Number	00000000000000000001
Next SCAR Number	00000000000000000001

2. Choose the site for posting items that require inspection.
3. Enter the document number for the next NSR.

4. Enter the document number for the next SCAR.
5. Choose OK.

ECM system settings

Engineering Change Management (ECM) is a part of the Manufacturing that controls and tracks product changes.

Basically, the ECM system tracks which products are being changed and helps you deal with the effects of those changes. If you're changing a bill of materials, for instance, you might want to warn buyers that component requirements might change. Some product changes will need to be communicated to your customers; others might not.

You'll use ECM system preferences to determine both how the ECM system works for your organization—how change orders will move through your organization, for example—and how the ECM system affects other Manufacturing modules.

These are some of the terms you'll need to know as you're working with Engineering Change Management:

Disposition code The disposition code describes what is to be done with the existing inventory quantities of the item that is being changed.

Denial code The denial code describes why a request for an engineering change is being denied.

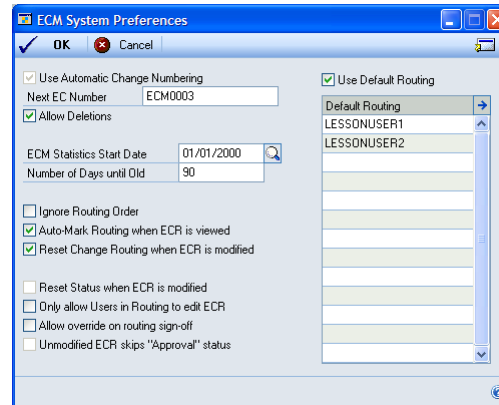
Routing In Engineering Change Management, a routing is the list of users who must approve of a change before the change can be put into effect. Routings can be set up so that approvals can be granted in a specific order.

Setting engineering change system settings

You'll need to complete these setup tasks once, but you can change them later, if needed. User-specific preference tasks are described in [Setting up engineering change user preferences](#) on page 71.

To set engineering change system settings:

1. Open the ECM System Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> ECM)



2. To change order numbers to be generated automatically, enter the first number to be used in the Next EC Number field.
3. To be able to delete change requests, mark the Allow Deletions option.
4. Determine if the time it takes for processing change requests should be tracked.

If it should, choose the date when tracking should begin—the ECM Statistics Start Date—and set the number of days an engineering change order must be in process to be considered “old.”

5. Determine how to have change requests routed through your organization.

Ignore Routing Order If the order of the approvals doesn’t matter, mark Ignore Routing Order. If this option is marked, users must review engineering change orders in the order users appear in the engineering change routing.

Auto-mark Routing when ECR is modified If your company uses the ECM system mainly as a notification system and if change requests are to be “approved” as soon as certain users view them, mark Auto-Mark Routing when ECR is modified.

This option is the system default setting, but individual users can determine if they want to use the “auto-mark” feature.

Reset Change Routing when ECR is modified If change orders should go through the entire routing again if any of the reviewers make a change, mark Reset Change Routing when ECR is modified.

Only Allow Users in Routing to edit ECR If only users who are part of the ECM routing should be able to edit the change request, mark Only Allow Users in Routing to edit ECR.

Allow override on routing sign-off If alternate users should be able to approve change orders, mark Allow override on routing sign-off.

Alternate users will be required to supply the appropriate password to approve change orders. You'll be prompted to enter the password as soon as you mark this option.

6. Mark Use Default Routing to activate the default routing list and to require its use.



Refer to [Chapter 8, "Engineering change setup,"](#) in the *Manufacturing Management Functions* documentation for more information about creating routing lists for change requests.

7. Choose OK to save your information and close the window.

You'll also need to define disposition and denial codes, create change order routings and determine which Manufacturing modules will display warnings regarding change orders.

Refer to [Specifying modules for ECM warnings](#) on page 46, and to [Chapter 8, "Engineering change setup,"](#) in the *Manufacturing Management Functions* documentation for more information.

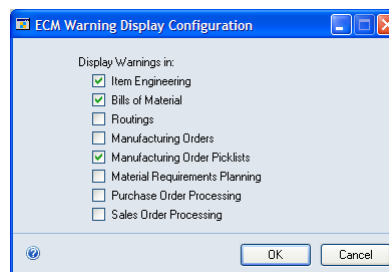
Specifying modules for ECM warnings

Engineering Change Management provides two major benefits. First, it helps ensure you've got the necessary approvals in place before you change a product, and second, it helps notify others of those pending changes.

To take full advantage of the notification features in Engineering Change Management, you need to specify which modules should be affected by the engineering change requests in your company. You'll use the ECM Warning Display Configuration window to make your selections.

To specify modules for ECM warnings:

1. Open the ECM Warning Display Configuration window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> ECM >> Go To button >> Warning Display Configuration)



2. Mark the modules or parts of modules that you want tied to the engineering change management notification system. You can mark as many or as few options as you like.



If you're using one of the modules or windows marked here and select an item that has an outstanding engineering change, a message appears, telling you there is an engineering change request for that item. You can continue working with the record, or

you can choose View Details to open a view-only window summarizing the particular engineering change request.

3. Choose OK to save the information and close the window.

Job Costing system preferences

The default settings you select for Job Costing in the Job Costing Preference Defaults window will determine which transaction types can be used in calculating job costs, who will be able to unlink job elements or apply transactions, and how Payables Management transactions will be divided among jobs.

Job Costing includes the following entries:

Default Transaction List After you've created a transaction list, you can specify it to be the default transaction list for jobs. If needed, you can select a different transaction list in the Job Maintenance window.

Refer to [Creating a transaction list](#) in [Chapter 12, "Job Costing setup cards,"](#) of the Manufacturing Management Functions documentation for more information.

Job Security Set The Job Security Set is a security group to apply to all jobs. This will be the group of users who can change the status of a job, unlink elements, or manually apply transactions. The Job Security Set can be based on a group of user IDs or on a password.

For more information about security sets, refer to [Process security](#) on page 18.

Default Distribution Method Select a default method for distributing cost amounts across jobs for Payables Management transactions. Most elements can only be linked to one job, but some costs—such as freight and miscellaneous charges—can be linked to several jobs. The default distribution method will determine how the dollars are spread across the jobs in the system.

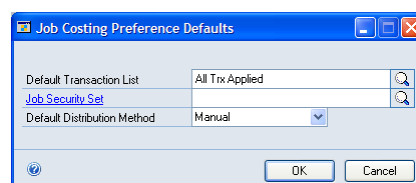
- If you select manual, you can specify the amounts to be distributed to different jobs.
- If you select number of jobs, the costs will be divided among the linked jobs.

Defining Job Costing system settings

You enter default system settings once, but you can change these entries, as needed. Refer to [Job Costing system preferences](#) on page 47 for more information.

To define Job Costing system settings:

1. Open the Job Costing Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> Job Costing)



2. Choose the default transaction list.
3. Choose the job security setting to determine which group of users can complete job costing tasks, or which password will allow any user to complete those tasks.
4. Choose the preferred method for distributing costs among jobs. Later, you can adjust the amounts, as needed. Choices include Manual and Number of Jobs.

Manual If you choose Manual, you'll need to manually distribute costs of a financial transaction among jobs.

Number of Jobs If you choose Number of Jobs, the system will distribute costs based on the number of jobs currently in your system.



If you select Number of Jobs, be sure that each of the jobs linked to the transaction is assigned a transaction list that includes that type of transaction. For example, suppose you have a receivings transaction with two lines, each linked to a different job. You use the Number of Jobs method to distribute Miscellaneous expense between the jobs. If only one of the jobs has been assigned a job transaction list that includes the Miscellaneous transaction type, then all the expense will be applied to that job.

5. Choose OK.

Chapter 6: Manufacturing planning functions setup

Information about setting up system settings for use with planning functions modules, especially Material Requirements Planning (MRP), is included here. You'll need to set up system settings to determine how Manufacturing will function for your business.

This information is divided into the following sections:

- [MRP system settings](#)
- [Setting up general MRP options](#)
- [Setting up MRP buckets](#)
- [Generating MRP suggestions for supply orders](#)
- [Specifying quantities to include in MRP](#)
- [MRP options for past-due orders](#)
- [Choosing MRP display quantities](#)
- [Changing MRP quantity labels](#)
- [Scheduling MRP updates](#)
- [Setting security options for net changes](#)
- [Restoring MRP quantity labels](#)

MRP system settings

System preference settings for Material Requirements Planning (MRP) can be grouped into several categories. MRP settings are all made in the MRP Preference Defaults window.

General MRP options Use these settings and options to reflect the basic use of MRP in your business. For instance, you can use these options to determine the default MRP bucket size and whether sales order quotes should be included in MRP calculations. You also can specify whether down days should be considered when release dates are calculated for MRP-planned orders. Refer to [Setting up general MRP options](#) on page 50 for more information.

Bucket options Use these options to determine the buckets that will be used to summarize MRP information. You must choose Days, but you also can choose Weeks, Months, or both. You also can create a user-defined bucket to view information. Refer to [Setting up MRP buckets](#) on page 51.

Generate MRP suggestions for supply orders options Use these options to specify whether to generate MRP suggestions to move in, move out, or cancel items on purchase orders or manufacturing orders to prevent shortages or overages. Refer to [Generating MRP suggestions for supply orders](#) on page 52 for more information.

MRP display quantities Use these options to make decisions about your material requirements. The calculations you choose will be displayed in MRP windows. Refer to [Choosing MRP display quantities](#) on page 53 for more information.



These options will be system default settings. Each user can also change these settings to a customized view of MRP information. Refer to [Setting up MRP user preferences](#) on page 77 for more information.

Quantities to include Use these options to specify which quantities should be included in MRP calculations. For example, you can choose to include—or exclude—sales order quotes. Refer to [Specifying quantities to include in MRP](#) on page 52.

MRP labels Use these options to define prompts and abbreviations that are provided for various MRP quantities. You can use the default options or create your own. If you choose to display these quantities, the prompts you've created for them will be used in MRP windows. Refer to [Changing MRP quantity labels](#) on page 54 for more information.

Schedule MRP options Use these options to specify how and when to update MRP information, and how far into the future to calculate MRP information. Refer to [Scheduling MRP updates](#) on page 55 for more information.

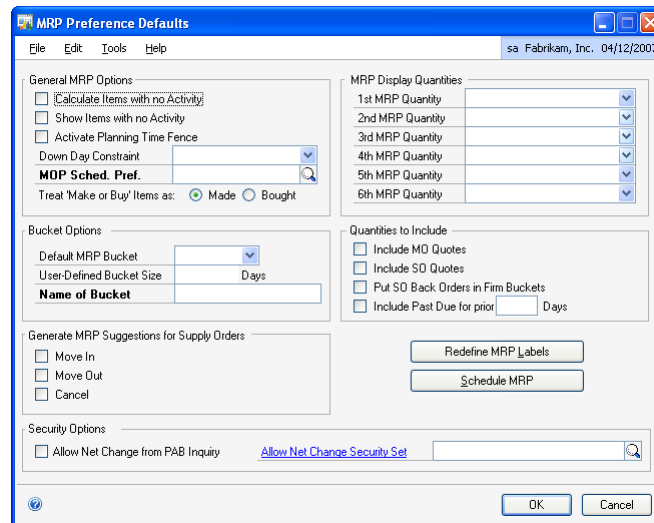
Security options Use these options to allow users to process net change regeneration in the MRP Projected Available Balance Inquiry window and to limit which users can process net changes. Refer to [Setting security options for net changes](#) on page 56.

Setting up general MRP options

You can set up systemwide preferences in the MRP Preference Defaults window, but users can change some settings based on their user IDs.

To set up general MRP options:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)



2. Mark General MRP Options, as needed.

Calculate Items with no Activity MRP processes will calculate information for all items, regardless of whether they are included in any sales orders, purchase orders, manufacturing orders, sales forecast, or inventory activity for the MRP regeneration period.

Show Items with no Activity MRP windows will display information about items with no activity. Information about items, sites, and item-site combinations that have been excluded from MRP processing will also be displayed in MRP windows (but the only information available for those records will be the initial on-hand quantity).

This option isn't available unless you mark Calculate Items with no Activity.



If you mark Show Items with no Activity, users who don't want to see those items can mark that preference in the MRP Preferences window. If you don't mark Show Inactive Items, however, no users can view the inactive records.

3. Mark the Activate Planning Time Fence option to have MRP-planned orders planned outside the time fence.

Refer to [Planning time fences](#) and [Example: Planning time fence in use](#) in [Chapter 8, "MRP overview,"](#) in the Manufacturing Planning Functions documentation for more information.

4. Determine whether make or buy items should be treated as made or bought items. This option determines whether manufacturing orders or purchase orders are created or suggested when MRP processing identifies a shortage.
5. If you're generating manufacturing orders or MRP-planned manufacturing orders automatically, you must select a manufacturing order scheduling preference.
6. With the Down Days Constraint list, specify which items' release dates for MRP-planned orders should reflect down days in the shop calendar.

Refer to [Example: Planning time fence in use](#) in [Chapter 8, "MRP overview,"](#) in the Manufacturing Planning Functions documentation for more information.

7. Choose OK to save your selections. You can close the window or you can continue to set up other MRP system preferences.

Setting up MRP buckets

Use the MRP Preference Defaults window to select the default bucket size for MRP information. You also can set up a user-defined bucket size to view information.

To set up MRP buckets:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)

2. Choose a default bucket size. Choices are Days, Weeks and Months.



You can choose to override this setting when you recalculate MRP quantities.

3. To create a special bucket size, enter the number of days in the bucket in the User-Defined Bucket Size field, then enter a name for the bucket.
4. Choose OK to save your selections. You can close the window or you can continue to set up other MRP system preferences.

Generating MRP suggestions for supply orders

Use the MRP Preference Defaults window to specify that if MRP calculations uncover a shortage or an overage, suggestions are generated to reschedule or cancel certain manufacturing orders or purchase orders.



You can use the MRP Quantities Query window to see which orders should be moved in or moved out. Refer to [Moving or canceling an order](#) on page 77 in the Manufacturing Planning Functions documentation for more information.

To generate MRP suggestions for supply orders:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)
2. Mark options to generate suggestions if there is a shortage or an overage of an item.

Move In Mark to generate suggestions that you reschedule certain manufacturing orders or purchase orders to prevent shortages from occurring. If MRP calculations uncover a shortage of an item and if there's an existing order for the item in the future, the order can be "moved in" to the existing order to prevent the shortage. Refer to [Moving or canceling an order](#) on page 77 in the Manufacturing Planning Functions documentation for more information.

Move Out Mark to generate suggestions that you reschedule certain manufacturing orders or purchase orders to prevent stock overages on the current due date. An appropriate future date to move the order to cover a future net requirement is proposed. Refer to [Moving or canceling an order](#) on page 77 in the Manufacturing Planning Functions documentation for more information.

Cancel Mark to generate suggestions that items should be canceled on certain manufacturing orders or purchase orders to prevent stock overages. If the Move Out option also is marked and a future net requirement exists that the order may be moved to, the suggestion is to move out the order rather than cancel the order. Refer to [Moving or canceling an order](#) on page 77 in the Manufacturing Planning Functions documentation for more information.

3. Choose OK. You can close the window, or you can continue to enter MRP system preferences.

Specifying quantities to include in MRP

Use the MRP Preference Defaults window to specify which manufacturing order and sales order quantities should be reflected in MRP. You also can specify whether past-due orders should be reflected in MRP.

To specify quantities to include in MRP:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)
2. Mark options regarding how different order types and statuses are handled.

Include MO Quotes Material requirements for quote-status manufacturing orders will be considered when MRP is calculated, and treated as planned quantities.

Include SO Quotes Material requirements for quote-status sales orders will be considered when MRP is calculated, and will be treated as planned quantities.

Put SO Back Orders in Firm Buckets Requirements for back-ordered sales orders will be added to the “firm” quantity requirements. If you don’t mark this option, back-ordered quantities will be added to “planned” quantities.

3. Determine if past-due manufacturing, sales orders, and purchase orders should be included in MRP calculations. Refer to [MRP options for past-due orders](#) on page 53 for more information.

If you want this capability for manufacturing and sales orders, mark Include Past Due for prior. Use the Days field to specify how many days past due orders can be to be included in MRP calculations.



Requirements for past-due manufacturing orders and their past-due components and sales orders will be included in the past-due bucket of the regeneration.

4. Choose OK. You can close the window, or you can continue setting up MRP system preferences.

MRP options for past-due orders

Material Requirements Planning (MRP) includes options that determine how past-due orders will be handled. You can choose to allow past-due orders for sales orders, purchase orders and manufacturing orders and their past-due components. If you use these options, you must specify a time period for past-due orders. If a past-due order is within the time period, you won’t need to create a new order to account for its quantities, and MRP quantities will continue to reflect the past-due order quantities.

For example, suppose your company allows past-due purchase orders that are within a three-day time period. You’ve ordered 100 widgets to be delivered June 18. The widgets are delivered June 20. Because they arrived within the three-day time period, you can accept the order without having to create a new one, and MRP quantities will still be current. MRP calculations will reflect the past-due widgets, so no shortage will be reported.

If the delay of the widgets then caused the delay of the manufacturing order fulfillment by a day, the order would still be fulfilled and its finished goods included in MRP calculations.

If you choose not to use these options for handling past-due orders, MRP will ignore the quantities on the past-due orders and you’ll need to create new orders (with new due dates) to handle the quantities.

Choosing MRP display quantities

You can choose the MRP quantities to display in MRP windows.



Refer to online help for information about how the different quantities are calculated. Some of these quantities will reflect MRP-Planned orders and demand.

To choose MRP display quantities:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)
2. In the MRP Display Quantities section, choose an MRP quantity from each of the lists. The quantities you choose will be displayed in your MRP windows.

For descriptions of MRP quantities, refer to [MRP quantities](#) in [Chapter 8, "MRP overview,"](#) in the Manufacturing Planning Functions documentation.



The selections you make for displaying MRP quantities are system settings, but individuals can choose to have different quantities displayed.

3. Choose OK. You can close the window, or you can continue to enter MRP system preferences.

Changing MRP quantity labels

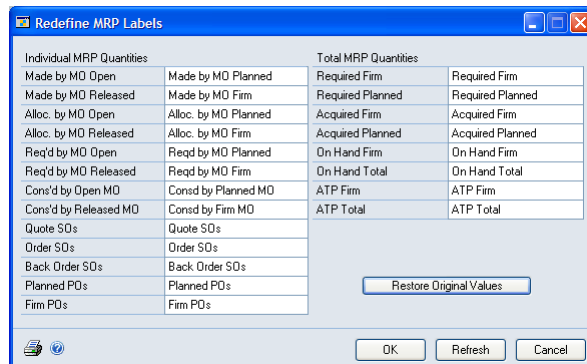
If you use different terminology for MRP quantities, you can change the labels on the fields and have those labels used where the quantities are displayed.



The changes you make to the labels won't be reflected in printed documentation or online help, so it's a good idea to be sure that you have agreement from all users before making this change.

To change MRP quantity labels:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)
2. Choose Redefine MRP Labels to open the Redefine MRP Labels window.



3. Change the terminology for as many or as few labels as you like. To reset the labels, choose Restore Original Values.
4. Choose OK.

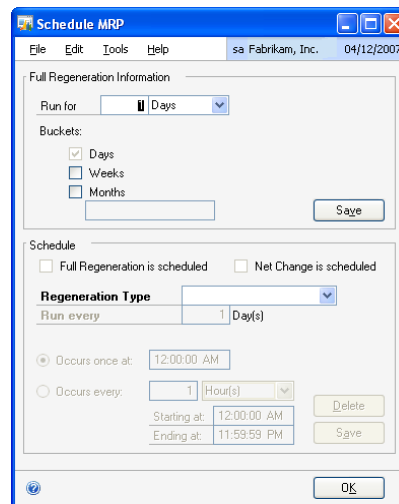
Scheduling MRP updates

Use the Schedule MRP window to schedule when to update MRP information. You can create one schedule for a full regeneration and one schedule for a net change. A full regeneration calculates all MRP requirements through the defined period of time. A net change recalculates MRP information only for those orders that have changed since the last time MRP was calculated. You must be a system administrator to open this window.

A scheduled MRP run is a scheduled Microsoft SQL Server[®] job. The SQL Server Agent must be running for the scheduled MRP to run.

To schedule MRP update:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)
2. Choose Schedule MRP to open the Schedule MRP window.



3. If you are scheduling a full regeneration, enter the following information and choose Save.

Run for Specify how far into the future MRP information should be calculated. Enter a number and select days, weeks, or months.

Buckets Mark to determine how MRP information will be displayed. Days must be one of your choices. The more options you mark, the longer MRP processing will take.

4. From the Regeneration Type list, select a type of MRP update process.
5. Enter how often to run the update.
6. Mark when the update should occur. The schedule can occur once at a specific time or at intervals that you specify.

7. Choose Save.
8. Choose OK to close the window.

Setting security options for net changes

Use the MRP Preference Defaults window to allow users to process net change regeneration in the MRP Projected Available Balance Inquiry window and to limit which users can process net changes.

For more information, refer to [Process security](#) on page 18 and [Creating and modifying process security sets](#) on page 18.

To set security options for net changes:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)
2. Mark the Allow Net Change from PAB Inquiry option to allow users to process net change regenerations from the MRP Projected Available Balance Inquiry window.
3. Enter or select a security set that can be used to restrict users' abilities to process a net change regeneration. You can limit access by user ID or by requiring users to supply a password. This field is available if you mark the Allow Net Change from PAB Inquiry option.
4. Choose OK. You can close the window, or you can continue to enter MRP system preferences.

Restoring MRP quantity labels

To use the original MRP labels after you've changed them, you can restore the original values.

To restore MRP quantity labels:

1. Open the MRP Preference Defaults window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> System Defaults >> MRP)
2. Choose Redefine MRP Labels to open the Redefine MRP Labels window.
3. Choose Restore Original Values.
4. Choose OK.

Part 2: Manufacturing user setup

This part of the documentation includes information that will help you set up Manufacturing user preferences. Most of this information will need to be set up only once for each user, but you can refer to this information at other times for instructions on modifying or viewing existing entries.

The following information is discussed:

- [Chapter 7, “Manufacturing basic user setup.”](#) describes options for setting up user preferences. Information about specifying default selections for report formats is included.
- [Chapter 8, “Manufacturing core functions user setup.”](#) includes information about specifying user preferences for Bills of Materials.
- [Chapter 9, “Manufacturing production functions user setup.”](#) contains information about specifying routing options and manufacturing order scheduling options.
- [Chapter 10, “Manufacturing management functions user setup.”](#) includes information about user preference settings for Engineering Change Management and Quality Assurance.
- [Chapter 11, “Manufacturing planning functions user setup.”](#) includes information about options for Capacity Requirements Planning and Material Requirements Planning.

Chapter 7: Manufacturing basic user setup

You can set up preferences to customize some aspects of your Manufacturing system—for instance, what information is displayed in a window or how fields are cleared.

User preferences are set on a user-by-user basis. Because of this, users must log into the system with their own user IDs to be able to see their user preferences in effect. User preferences affect only the computer where the login was used.

Before you set up user preferences, you must set up system default settings for Manufacturing. Refer to the following documents for more information:

- [Chapter 1, “Manufacturing basic setup”](#)
- [Chapter 3, “Manufacturing core functions setup”](#)
- [Chapter 4, “Manufacturing production functions setup”](#)
- [Chapter 5, “Manufacturing management functions setup”](#)
- [Chapter 6, “Manufacturing planning functions setup”](#)

This information is divided into the following sections:

- [System administrators and user preferences](#)
- [General user preferences for Manufacturing](#)
- [Setting up manufacturing-specific preferences](#)
- [Setting up INI user settings](#)

System administrators and user preferences

Access privileges for setting user preferences can vary from user to user. Some users—such as system administrators—might be granted special “system user” privileges so they can set up user preferences both for themselves and for others. Most users, though, will have access privileges to set up only their own user preferences.



If you don't have access to the user preference windows but want to make changes, contact your system administrator.

General user preferences for Manufacturing

Manufacturing includes several “general” user preference settings that you can use to access other applications—such as web browsers or graphics applications—and to customize characteristics such as fonts and colors in Manufacturing windows.

General user preferences can be grouped into three categories:

Manufacturing-specific user preference settings These affect options available only for Manufacturing users. Refer to [Setting up manufacturing-specific preferences](#) on page 60 for more details.

INI user settings These allow you to choose the location of other applications that link to Manufacturing data, or that might help you view graphics or multimedia files you've attached to your item records. Refer to [Setting up INI user settings](#) on page 60 for more details.

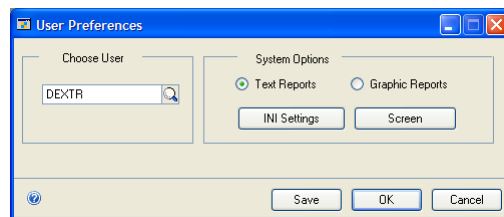
Microsoft Dynamics GP user preference settings These determine the display characteristics of windows: font styles such as italic or bold, font colors, and so on. Refer to your System User's Guide (Help >> Contents >> select Using the System) for more details.

Setting up manufacturing-specific preferences

User preferences are a series of default system settings that are attached to each user ID. After you set up your user preferences, they'll be active each time you log on.

To set up manufacturing-specific preferences:

1. Open the User Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> User)



2. If you have system user access privileges, enter or select a user ID in the Choose User field. If you're not a system administrator, your user ID appears.
3. In the Systems Options, mark a report option.

"Text reports" is the default Microsoft Dynamics GP format for printing reports. Graphic reports have additional graphic features such as shading and borders.

4. Save the settings.

If you're a system administrator and are setting up preferences for other users, choose OK. The information will be saved and the window will stay open so you can choose another user ID and continue to set up user preferences for other users. Close the window when you've finished setting up user preferences.

If you aren't a system administrator, choose OK to save the settings and close the window.

Setting up INI user settings

You must set up Manufacturing INI settings if you plan to use any of the following features:

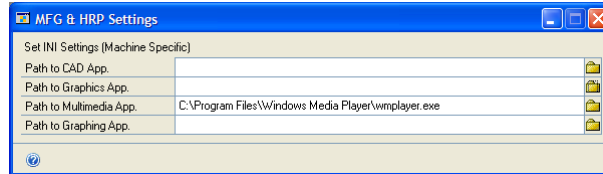
- Attaching graphics files to routings or items
- Attaching multimedia files to routings or items
- Attaching CAD files to routings or items

INI settings are specific to a computer, not to a user. You might want to use different software to view files on different machines. Drafting department employees, for example, might have the full version of the software used to create and modify

CAD drawings, while others in the company have versions of the software to only view the drawings.

To set up INI user settings:

1. Open the MFG & HRP Settings window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> User >> INI Settings)



You need to specify pathnames only for the features you'll use in Manufacturing. If your company isn't attaching graphics files to routings or items, for example, don't set up the graphics path.

2. Enter a path to a CAD application or choose the browse button on the Path to CAD App field to find the application you'll use to view CAD files. This application will be used to view all electronic drawings on your computer that have a CAD type.
3. Enter a path to a graphics application or choose the browse button on the Path to Graphics App field to find the application you'll use to view graphics.
4. Enter a path to a multimedia application or choose the browse button on the Path to Multimedia App field to find the application you'll use to view multimedia files.
5. Enter a path to a graphing application or choose the browse button on the Path to Graphing App field to find the application you'll use to graph Manufacturing data.
6. Close the window when you've finished specifying the pathnames to save the information.

Chapter 8: Manufacturing core functions user setup

Most Manufacturing modules include user preference settings. You can use these settings to customize some aspects of the system—such as what information is displayed in a window or how fields are cleared—on a user-by-user basis.

Before you set up user preferences, you must set up system default settings for Manufacturing. Refer to these documents for more information:

- [Chapter 1, “Manufacturing basic setup”](#)
- [Chapter 3, “Manufacturing core functions setup”](#)
- [Chapter 4, “Manufacturing production functions setup”](#)
- [Chapter 5, “Manufacturing management functions setup”](#)
- [Chapter 6, “Manufacturing planning functions setup”](#)

This information is divided into the following sections:

- [User preference settings](#)
- [Setting up bills of materials user preferences](#)

User preference settings

Because user preferences are linked to the user ID you use to log into the system, user preferences are in effect only when that user is logged into the system, and affect only the computer where the login was used.

Most users can change only their own user preferences. System administrators, however, can set user preferences for other users.

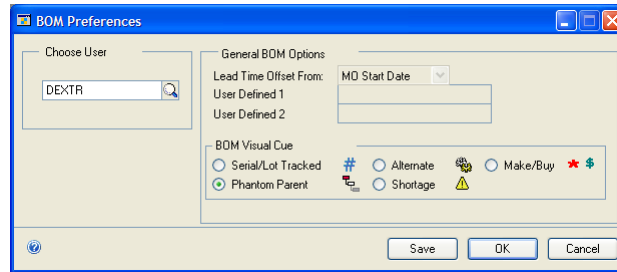
Setting up bills of materials user preferences

You can use the BOM Preferences window to select an icon that will be displayed in the tree view of the Bill of Materials Entry window and the Bill of Materials View window. Icons are available to show different information about the components in each bill of materials, such as whether the item is tracked by lot or serial numbers, whether it is a made or purchased item, and so on.

You also can use the window to view the systemwide values that have been set up for your company. You can view the date value that is used to calculate component lead time information, and you can view the labels that have been set up for user-defined fields, if any.

To set up bills of materials user preferences:

1. Open the BOM Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> Bill of Materials)



2. If you have system administrator privileges, enter or select a user ID. If you don't have system administrator privileges, your own user ID will be displayed in the Choose User field, and you can set up preferences for only your own login.
3. Mark the icon to be used in the tree view of the Bill of Materials Entry window and the Bill of Materials View window.
4. Save the settings.

If you are a system administrator and are going to set up Bill of Materials preferences for other users, choose Save. The information will be saved and the window will stay open so you can set Bill of Materials user preferences for other users. Close the window when you've finished setting user preferences for additional users.

If you aren't a system administrator, choose OK to save your settings and close the window.

Chapter 9: Manufacturing production functions user setup

Most Manufacturing modules include user preference settings. For production functions modules, you can specify options for entering routing sequence and data collection information.

Because user preferences are linked to the user ID needed to log into the system, the preferences are in effect only when that user is logged into the system. User preferences affect only the computer where the login was used.

Before you set up user preferences, you must set up system default settings for Manufacturing. Refer to these documents for more information:

- [Chapter 1, "Manufacturing basic setup"](#)
- [Chapter 3, "Manufacturing core functions setup"](#)
- [Chapter 4, "Manufacturing production functions setup"](#)
- [Chapter 5, "Manufacturing management functions setup"](#)
- [Chapter 6, "Manufacturing planning functions setup"](#)

This information is divided into the following sections:

- [Setting up routing user preferences](#)
- [Setting up sequence entry user options](#)
- [Setting up spacing and pointer routing options](#)
- [Setting up WIP user preferences](#)

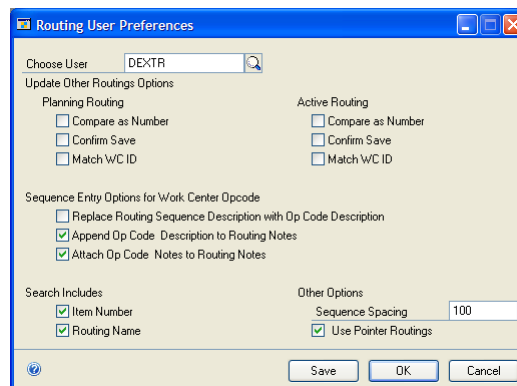
Setting up routing user preferences

Use the Routing User Preferences window to customize each user's view of routing information. You can set up options affecting how updates to routings are reflected in related routings. You also can choose sequence entry options for work center opcodes and can set search options and sequence spacing.

Sequence entry options control the information that is retrieved when a user accesses data during routing entry.

To set up routing user preferences:

1. Open the Routing User Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> Routings)



2. If you have system administrator privileges, enter or select a user ID. If you don't have system administrator privileges, your own user ID will be displayed in the Choose User field, and you can set up preferences for only your own login.
3. Determine how to update planning routings.

Compare as Number If all planning routing sequence numbers are numeric, mark Compare as Number.

Confirm Save To have the message "Are you sure you want to do this?" displayed before planning routings are changed, mark Confirm Save.

4. Determine if other planning routings should be updated based only on the routing name and sequence number.

Whether a routing update is applied to other routings is always determined by the routing name and sequence number. The routing name and sequence number must match before a change in one routing sequence is reflected in a sequence in another routing.

- If you mark Match WC ID, the routing sequence change will be applied to only the routing sequences that have the same routing name, sequence number, and work center ID.
- If you don't mark Match WC ID, all routings that have the same routing name and sequence number will be updated, regardless of the work center ID.

5. Determine if active routings should be updated based only on the routing name and sequence number.

Whether a routing update is applied to other routings is always determined by the routing name and sequence number. The routing name and sequence number must match before a change in one routing sequence is reflected in a sequence in another routing.

- If you mark Match WC ID, the routing sequence change will be applied to only the routing sequences that have the same routing name, sequence number and work center ID.
- If you don't mark Match WC ID, all routings that have the same routing name and sequence number will be updated, regardless of the work center ID.

6. Determine how to search your routing records. You can mark either or both Search Includes options.

- If you mark Item Number, searches of routing records will display only those routings that include the item number you specify.
- If you mark Routing Name, searches of routing records will display only the routing that has the name you specify.

7. Choose OK.

Setting up sequence entry user options

To print routing information for use on the production floor, you can set up options to ensure that the information your employees need is included in the reports. Use the Routing User Preferences window to set up routing entry user preferences.

To set up sequence entry user options:

1. Open the Routing User Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> Routings)
2. If you have system administrator privileges, enter or select a user ID. If you don't have system administrator privileges, your own user ID will be displayed in the Choose User field, and you can set up preferences for only your own login.
3. Mark Replace Routing Seq. Descr. with Op Code Description to view operation code descriptions rather than routing sequence descriptions.
4. Mark Append Op Code Description to Routing Notes to add the operation code description to the routing notes.
5. Mark Attach Op Code Notes to Routing Notes to add the operation code notes to the routing notes.
6. Save the settings.

If you have system user access privileges and are going to set up routing preferences for other users, choose Save. The information will be saved and the window will stay open so you can set up routing user preferences for other users. Close the window when you've finished setting user preferences.

If you don't have system user access privileges, choose OK to save your settings and close the window.

Setting up spacing and pointer routing options

Use the Routing User Preferences window to set up options for sequence number spacing and to determine if pointer routings can be used in your facility.

You can use any numbering spacing, but we recommend using spacing intervals of 10 or 100. This makes it easier to insert a new sequence between existing sequences.

To set up spacing and pointer routing options:

1. Open the Routing User Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> Routings)
2. Enter a default spacing for routing sequence numbers.

3. Mark Use Pointer Routings to use pointer routings in your system. You can't mark the Use Pointer Routings option unless the systemwide setting to use pointer routings also is marked.



Refer to [Creating a pointer routing](#) in [Chapter 5, "Pointer routings,"](#) in the *Manufacturing Production Functions* documentation for more information about pointer routings.

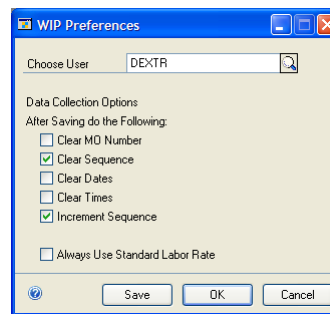
4. Choose OK.

Setting up WIP user preferences

Use the WIP Preferences window to select options to make data entry tasks easier. The options you select will affect how the Data Collection Transactions window works.

To set up WIP user preferences:

1. Open the WIP Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> WIP)



2. If you have system user access privileges, enter or select a user ID in the Choose User field. If you aren't a system administrator, your user ID will appear.
3. Mark options to indicate what should happen when a data collection entry record is saved.

Clear MO Number Clears the MO Number field in the Data Collection window each time you save a data collection record.

Clear Sequence Clears the Sequence field in the window each time you save a data collection record.

Clear Dates Clears the Date fields in the window each time you save a data collection record.

Clear Times Clears the Time fields in the window each time you save a data collection record.

4. To have the system automatically enter the next sequence in the selected routing in the Sequence field, mark the Increment Sequence option.

5. To have the system always calculate labor costs using the standard labor rate, mark Always Use Standard Labor Rate.
6. Choose OK.

Chapter 10: Manufacturing management functions user setup

Most Manufacturing modules include user preference settings. This document includes information about user preferences for the management functions modules—Quality Assurance, Engineering Change Management and Job Costing. For example, you can specify what kinds of quality assurance records are displayed when you open a Quality Assurance window. You also can specify what constitutes an “old” engineering change order request, and whether you want change requests to be marked as reviewed as soon as you’ve opened them.

Because user preferences are linked to the user ID needed to log into the system, the preferences are in effect only when that user is logged into the system. User preferences affect only the computer where the login was used.

Before you set up user preferences, you must set up system default settings for Manufacturing. Refer to these documents for more information:

- [Chapter 1, “Manufacturing basic setup”](#)
- [Chapter 3, “Manufacturing core functions setup”](#)
- [Chapter 4, “Manufacturing production functions setup”](#)
- [Chapter 5, “Manufacturing management functions setup”](#)
- [Chapter 6, “Manufacturing planning functions setup”](#)

This information is divided into the following sections:

- [Setting up engineering change user preferences](#)
- [Setting up quality assurance user preferences](#)

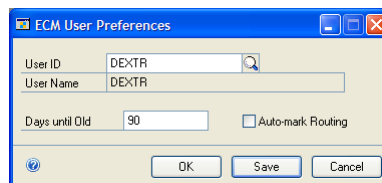
Setting up engineering change user preferences

You can set up two user preferences in Engineering Change Management. Use the ECM User Preferences window to define an “old” change order—one that is taking longer to go through its approval status than a number of days you specify—and also to indicate whether auto-marking features should be used.

These options also are included in the ECM System Preferences window. If the system defaults you set up there are applicable for all users, you can skip this setup step. You need to use the ECM User Preferences window only if users at your company need different definitions for “old” change orders, or if some users will use auto-marking features and others won’t.

To set up engineering change user preferences:

1. Open the ECM User Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> ECM)



2. If you have system user access privileges, enter or select a user ID. If you don't have system administrator privileges, your own user ID will be displayed in the User ID field, and you can set up preferences for only your own login.
3. Enter the number of days until changes will be considered old. This value will be used to identify aged change orders in the Engineering Change Statistics window.
4. Mark the Auto-mark Routing option if change orders should be marked automatically when you review them.
5. Save the settings.

If you are a system administrator and are going to set up ECM preferences for other users, choose Save. The information will be saved and the window will stay open so you can set up ECM user preferences for other users. Close the window when you've finished setting up user preferences.

If you aren't a system administrator, choose OK to save your settings and close the window.

Setting up quality assurance user preferences

You can use the QA User Preferences window to select a default sorting option and to choose which quality assurance records will be displayed when you open the QA Incoming window.

These are only default settings. You can select different sorting methods or choose to see different records when you're using the QA Incoming window.

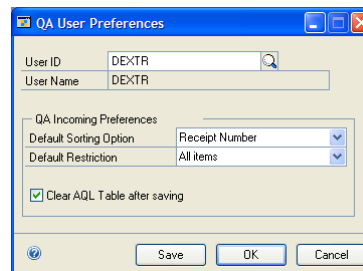


You must set up quality assurance system settings before you can set up quality assurance user preferences. Refer to [Setting up Quality Assurance](#) on page 43.

You also can choose to have the Acceptable Quality Level (AQL) table automatically cleared after you save an AQL table record.

To set up quality assurance user preferences:

1. Open the QA User Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> QA)



2. Select the default sorting method for records in the QA Incoming window. Choices are PO Number and Receipt Number.

3. Select the default restriction for records in the QA Incoming window.

All Items View records for all items that have been received.

QA Required – Show All Receipts View records for all items requiring incoming inspection that have been received.

QA Required – Restrict by Date View records for all items requiring incoming inspection that were received on a purchase receipt with a date that is within a range you specify.

QA Completed View records for all items that have been inspected.



This default restriction will be used each time you open the QA Incoming window. You can switch to other views of the quality assurance records when you're using the QA Incoming window.

4. To automatically clear the AQL (Acceptable Quality Level) table after its associated incoming inspection record has been saved, mark Clear AQL table after saving.
5. Save the settings.

If you are a system administrator and are going to set up Quality Assurance preferences for other users, choose Save. The information will be saved and the window will stay open so you can set Quality Assurance user preferences for other users. Close the window when you've finished setting up user preferences.

If you aren't a system administrator, choose OK to save your settings and close the window.

Chapter 11: Manufacturing planning functions user setup

Most Manufacturing modules include user preference settings. This document includes information about user preferences for the planning functions modules—Sales Forecasting, Master Production Scheduling, Capacity Requirements Planning, and Material Requirements Planning. You can use these settings to customize some aspects of the system—for instance, what information is displayed in a window or how fields are cleared—on a user-by-user basis.

Because user preferences are linked to the user ID needed to log into the system, the preferences are in effect only when that user is logged into the system. User preferences affect only the computer where the login was used.

Before you set up user preferences, you must set up system default settings for Manufacturing. Refer to these documents for more information:

- [Chapter 1, “Manufacturing basic setup”](#)
- [Chapter 3, “Manufacturing core functions setup”](#)
- [Chapter 4, “Manufacturing production functions setup”](#)
- [Chapter 5, “Manufacturing management functions setup”](#)
- [Chapter 6, “Manufacturing planning functions setup”](#)

This information is divided into the following sections:

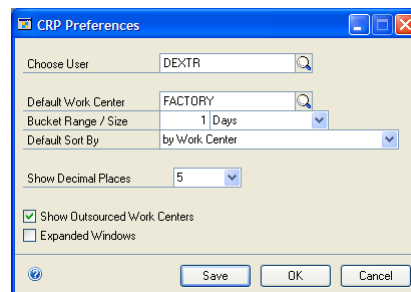
- [Setting up CRP user preferences](#)
- [Setting up MRP user preferences](#)
- [Restoring MRP default settings](#)
- [Setting up request resolution user preferences](#)

Setting up CRP user preferences

Capacity Requirements Planning (CRP) user preferences determine how the system displays CRP information accessed with the employee’s user ID. The options you choose will determine what information appears in the windows and in reports generated using CRP.

To set up CRP user preferences:

1. Open the CRP Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> CRP)



2. If you have system administrator privileges, select the user ID you want to set up preferences for. If you don't have system administrator privileges, your own user ID will be displayed in the Choose User field, and you can set up preferences for only your own login.
3. Select a default work center.

This selection will determine which work center's information is displayed first when you open CRP windows. You can still see information for other work centers—this will just be the first displayed.

4. Select a default bucket size. The bucket size determines how the information will be summarized in the CRP/MO Detail window. If you set this user preference to 2 Weeks, for example, then information in the CRP/MO Detail window will reflect the totals of capacity for two weeks at a time. To see the information in other bucket sizes, you can adjust the bucket sizes in the CRP/MO Detail window.
5. Select a default sorting method to determine how information is sorted when you use CRP windows. Sorting options include the following:



The option you choose here is only a default setting. You can use sorting options in CRP module windows to see information in other orders.

By Work Center View CRP information sorted by the work center IDs.

By Released Employee Load Percent View CRP work center information sorted by the percentage of employee load each work center carries for firm manufacturing orders.

By Released Machine Load Percent View CRP work center information sorted by the percentage of machine load each work center carries for manufacturing orders with Released status.

By + Open Employee Load Percent View CRP work center information sorted by the percentage of employee load each work center carries for manufacturing orders with Released or Open status.

By + Open Machine Load Percent Select this option to see CRP work center information sorted by the percentage of machine load each work center carries for manufacturing orders with Released or Open status.

6. Select the number of decimal places to be displayed for numeric fields in CRP.
7. Mark Show Outsourced Work Centers to include CRP information for work centers that are not part of your plant.

For example, you might have a contract with another firm to paint the farm machinery produced by your company. Your contract with the painting contractor might specify how much capacity the contractor reserves for you. To track use of that capacity, you can mark this option.

8. Mark Expanded Windows if scrolling windows in the CRP module should open in an expanded view.



This is just a default setting. You can change the view in the scrolling windows when you're using other CRP windows.

9. Save the settings.

If you are a system administrator and are going to set up CRP preferences for other users, choose Save. The information will be saved and the window will stay open so you can set up CRP user preferences for other users. Close the window when you've finished setting up user preferences.

If you aren't a system administrator, choose OK to save your settings and close the window.

Setting up MRP user preferences

Use the MRP Preferences window to set up general Material Requirements Planning (MRP) options and to select fields for windows and reports in MRP system. All the user preferences you set up in this window are on a user-by-user basis and the settings will override systemwide default preferences.

Refer to [Setting up general MRP options](#) on page 50 for more details about these MRP system default settings.

To set up MRP user preferences:

1. Open the MRP Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> MRP)

2. If you have system administrator privileges, enter or select a user ID. If you don't have system administrator privileges, your own user ID will be displayed in the Choose User field, and you can set up preferences for only your own login.

3. Set up general MRP options.
 - To view items, sites, and item-site combinations that have been excluded from MRP calculations or that have no activity, mark Show Items with no Activity. This option will be available only if the option to show inactive items is marked in the MRP Preference Defaults window.
 - To see a status window when MRP information is being regenerated, mark the Show Status Window option.
 - Select the default bucket size for your views in MRP windows. Choices are Days, Weeks and Months.
4. Select up to six MRP quantities to see when using MRP windows.

These fields will be displayed in windows and reports in the order in which they are displayed in this window. If the first field displayed should be Required Planned, select Required Planned for the first (top) list.

Refer to [MRP quantities](#) in [Chapter 8, “MRP overview.”](#) in the Manufacturing Planning Functions documentation for more information about how the quantities are calculated.



If new labels have been applied to the MRP quantities at your company, the new labels will be displayed in the lists. To see a cross-reference between the Manufacturing labels and those created by your company, choose MRP Label Cross-Reference. Any references to those quantities in documentation will be by the original Manufacturing labels.

5. Choose OK and close the window.

Restoring MRP default settings

You can use the MRP Preferences window to remove the user-defined MRP preference settings you've selected. Completing this procedure will make the user preferences for the selected user ID identical to the systemwide default settings.

To restore MRP default settings:

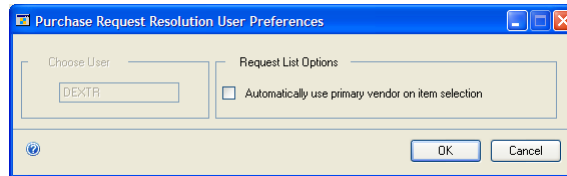
1. Open the MRP Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> MRP)
2. If you have system administrator privileges, enter or select a user ID. If you don't have system administrator privileges, your own user ID will be displayed in the Choose User field, and you can set up preferences for only your own login.
3. Choose Reset to System Defaults.
4. Choose OK and close the window.

Setting up request resolution user preferences

If you're using MRP, each user with purchase order entry responsibilities will need to set up user preferences for using primary suppliers.

To set up request resolution user preferences:

1. Open the Purchase Request Resolution User Preferences window.
(Microsoft Dynamics GP menu >> Tools >> Setup >> Manufacturing >> User Preferences >> Request Resolution)



You also can open this window through the Purchase Request Resolution window. Choose the Go To button and select Req. Resolution Preferences.

2. To automatically select the primary supplier of an item for auto-generated purchase orders, mark Automatically use primary vendor on item selection.
3. Choose OK and close the window.

Glossary

Acceptable Quality Level table

A representation of testing standards and sample sizes. AQL tables include information about appropriate sample sizes and the maximum number of pieces that can fail inspection in an acceptable lot. You'll probably set up several AQL tables to reflect different inspection standards for different items.

Active routing

See [Manufacturing order routing](#).

Actual costing

An inventory tracking method that involves constantly updating inventory each time an item is added or removed.

Actual demand

The total quantity of an item requested on all firm manufacturing orders.

Actual expenses (Job Costing)

The total of all applied expense transactions linked to a job.

Actual margin (Job Costing)

A measure of the overall profitability of a specific job. The actual margin for a job is calculated by dividing the actual profit by the actual revenue, and then multiplying the result by 100.

Actual profit (Job Costing)

The difference between actual expenses and actual revenues for a job.

Actual revenues

The total of all applied revenue transactions linked to a job.

Allocate

To reserve materials needed for a manufacturing order.

Alternate routing

Any planning routing for an item other than the primary routing.

Alternate work center

A work center to which work can be shifted if the customary work center for a specific task is not available. If the primary work center is temporarily shut down, or if demand exceeds the capacity of the primary work center, the work load can be shifted to the alternate work center.

Apply

To add the amount of a revenue or expense linked to a job to the financial information about the job. If a transaction isn't applied to a job, its amount won't be reflected in the overall financial information about the job. Applying transactions in Job Costing can happen manually or automatically.

AQL table

See [Acceptable Quality Level table](#).

ARCH BOM

See [Archived bill of materials](#).

Archived bill of materials

A bill of materials stored in a separate area of your computer system. Bills of material might be archived as they become obsolete.

Assemble to order

A type of manufacturing facility that puts a group of components together according to customer specifications.

Back order

An order to be fulfilled when stock for items in shortage is replenished.

Backflushing

A method of accounting for the use of resources—labor and machine time, and items—based on standards you've defined. Transactions to account for the use of backflushed resources are created when a manufacturing order is closed.

Backward finite scheduling

A scheduling method that starts from a due date and works out a plan for the flow of work through the plant with the assumption that there are only a limited number of resources (machines and workers) available to complete the task.

Backward infinite scheduling

A scheduling method that starts from a due date and works out a plan for the flow of work through the plant with the assumption that the plant has unlimited machine and worker capacity.

Batch cards

See [Manufacturing order](#).

Bill of materials

A list of the components and subassemblies needed to build one unit of a product. The bill of materials also shows quantities for each component.

Bill of operations

See [Routing](#).

Bin

A storage device to hold discrete items.

Blanket purchase order

A purchase order that is delivered gradually to the buyer.

Bucket

A time period used for calculating MRP requirements. Manufacturing supports daily, weekly, and monthly bucketing options.

Buy items

Items that are supplied to your plant by a supplier.

Buyer ID

Code that identifies the person who purchases the item from a supplier.

By-product

A finished good that is created incidentally to another finished good.

Child part

See [Component](#).

Class

A method for grouping similar parts or products.

Co-product

See [By-product](#).

Company data

Company data is the information you enter about your organization, such as its applicants, employees, benefits systems, training programs, and organizational structure.

Component

Items used to build a product. Component parts can be items (nuts, screws, diodes) or subassemblies (axles, circuit boards).

Component transaction

A line on a pick document to allocate, reverse allocate, issue, reverse issue, scrap, or reverse scrap components for a manufacturing order.

CONFIG BOM

See [Configured bill of materials](#).

Configuration data

In Bill of Materials, information about the product's overall design. It includes the design authority for the product, the unit of measure, and the revision level.

Configured bill of materials

A bill of materials that is built by selecting options from a super bill of materials.

Configured cost

The calculated cost of building a specific configured item, depending on the options a customer selects. The configured cost reflects the cost of the component items and the labor required to manufacture the item.

Configured price

The suggested price to charge the customer for a configured item, based on your finished goods price schedule and the selected options.

Configured routing

A routing based on the selected options. For example, if you created a configured bill of materials for office chairs and chose plastic components rather than wooden ones, the routing would be modified to exclude the sequences for staining and varnishing the wooden components. Also known as a "configured working routing."

Configured Working Routing

See [Configured routing](#).

Consume

To use up the quantity that has been issued to WIP—for materials, labor time, or machine time—for a manufacturing order.

Cost variance

The difference between the actual costs—for materials, machine time and labor—and the estimated costs for a manufacturing order. Cost variances can be positive or negative.

Customer record

A record that shows all the information you need to conduct sales transactions, such as address information, billing and shipping instructions, credit history and other data for that customer.

Cycle time

The total amount of time it takes to make one part, such as setup time, labor time, machine time, queue time and move time.

Default inventory site

The location commonly used to store raw materials or finished goods.

Defect code

An identifier for a particular type of item failure. For example, if an item is too long and fails a specification for length, you might create a defect code called LENGTH. Defect codes are used in Manufacturing reports to help summarize information.

Denial code

An identifier for the reason why an engineering change request wasn't approved.

Destination routing

A routing that you copy from another routing. You can add sequences to the destination routing.

Direct labor

The time spent by one or more production workers on filling a specific manufacturing order.

Discrete item

An item that is manufactured as a distinct unit. Examples of discrete items include computers, automobiles, and radios.

Disposition code

An identifier for a method for handling defective items. For example, you might decide to scrap certain defective items, and might assign a SCRAP disposition code to those items.

Double-booking

A situation where a job might inadvertently be charged twice for the same expense.

Down day

A day when the facility—the entire shop floor or a specific work center—is not in production.

Drawing

A schematic or other illustration. You can “attach” electronic drawing files—such as CAD illustrations, bitmaps and even .AVI movies—to records.

Drawing group

A set of related drawing files. For example, a drawing group might include several views of the same item.

Due date

The date when the items on a sales order should be ready to ship.

ECM

See [Engineering change management \(ECM\)](#).

ECO

See [Engineering change order \(ECO\)](#).

ECR

See [Engineering change request \(ECR\)](#).

Either item

Item that can be bought or manufactured by your company.

Element

An order or transaction that can be linked to a job, such as a manufacturing order, a sales order, a purchase order line, a receiving line, or inventory transaction.

Employee allocation

The assignment of workers to work areas. Each employee can be assigned an efficiency rating for a particular task. The number of hours per shift spent on a task can also be specified. Total scheduled employee hours for the work center are also displayed.

Employee efficiency percentage

A ranking of how an employee performs a given task. You can use this field different ways, depending on how your organization handles its employee efficiencies. Some organizations complete time studies of various tasks, and set task goals for workers based on those figures. Employees earn efficiency ratings based on their ability to meet those criteria. In other organizations, the top producer is assigned a value of 100% (or less) and all other employees would be ranked in comparison to the top producer.

ENG BOM

See [Engineering bill of materials](#).

Engineering bill of materials

A proposed bill of materials. Designs that are only in the prototype stage of development, for example, may have engineering bills of materials. In this way, the costs of producing a design can be studied without impacting the material requirements that the system generates.

Engineering change management (ECM)

The systems that a company has in place to ensure that changes to its product specifications are properly monitored.

Engineering change order (ECO)

The second stage of the engineering change management process. An engineering change order is a change that has been approved for incorporation.

Engineering change request (ECR)

The proposal stage of the engineering change management process. An engineering change request is a proposed change.

Estimated expense

A projection of the expenses for a job, entered in the Job Maintenance window.

Estimated margin

A job costing calculation based on estimated revenues and estimated expenses for a specific job. The estimated margin is calculated by dividing the estimated profit by the estimated revenues, and the multiplying the result by 100.

Estimated profit

The difference between the estimated expenses and the estimated revenues for a specific job.

Estimated revenue

A projection of the revenues for a job, entered in the Job Maintenance window.

Exclusions (MRP)

A method of marking an item, site or item-site combination so it isn't included in MRP calculations.

Exclusions (Sales Configurator)

Options that are disallowed because of another option selection.

Expensed floor stock

A bill of materials component that has been designated—regardless of its issue-to and issue-from sites—as a floor stock item. The cost of expensed floor stock is applied to an expense account, rather than to the cost of the finished item. See also [Floor stock](#).

Explode

To determine the total quantities of components needed for a manufactured item. To explode a bill of materials, the quantity ordered is multiplied by the quantity used for each of its components. Exploding continues throughout the bill of materials, so component requirements for subassemblies are also calculated.

Filled order

An order that has had all its requirements met and can be closed.

Finished goods

An item that is manufactured for sale. Also, the final products that a company sells.

Finite scheduling

A scheduling method that assumes that limited capacity for labor and machines is available.

Fixed order quantity

An order policy type that calculates order size for a day's requirements based on one or more of these variables: standard order quantity, order increment size, minimum order size, and maximum order size.

Fixed quantity

The quantity of a component that is required for each manufacturing order, regardless of how many finished goods are produced with the order. For example, if you use two widgets to calibrate equipment each time you begin a new manufacturing order, the fixed quantity for widgets would be 2 for the finished good bill of materials.

Floor stock

A bill of materials component that uses the same site for its issue-from and issue-to sites. The cost of this type of floor stock is applied to the cost of the finished item. *See also* [Expensed floor stock](#).

Forecasted demand

An estimate of how much of an item should be produced over a specific period of time.

Forward infinite scheduling

A scheduling type based on a starting date for an order, with the assumption that the plant has unlimited machine and worker capacity for the work order.

Full regeneration

An MRP process that recalculates your MRP data, including all sales orders, purchase orders, sales forecasts, and manufacturing orders. *See* [Net change regeneration](#).

Functional currency

The currency type (such as dollars or pounds) used by your organization for its accounting. *See also* [Originating currency](#).

General ledger variance

The difference between costs that have been added to WIP and the costs that have been removed from WIP for a specific manufacturing order.

Header record

The information that ties the pieces of a larger record together. For example, the header record of a routing includes information about the type of routing, the routing name, the date the routing was created and so on. This information ties sequence records together to create one routing record.

Hours per shift

The amount of time per shift actually spent working on the assigned tasks. To determine hours available per shift, subtract any non-task related activities from the total number of available hours. For example, if an employee is scheduled for an eight-hour shift but has a one-hour meeting and two quarter-hour breaks that day, the total available time would be 6.5 hours.

Inclusions

Option items automatically added to a configured bill of materials when a customer selects a certain option. For example, a computer manufacturer might offer a computer system in tan and black. If the customer selects the option for a tan computer, the computer manufacturer might set up the super bill of materials so that the tan keyboard automatically is included as part of the purchase.

Indirect labor

The time spent on tasks that are not directly related to filling a specific manufacturing order. Examples of indirect labor include meetings and training.

Instruction sheet

See [Routing](#).

Infinite scheduling

A scheduling method that assumes that all required capacity for labor and machines is always available.

Invoice history

The information tracked about past invoices. Invoice history allows you to determine what historical information you will need for tracking sales activity. History information can include transaction detail and/or account distributions.

Issue

A type of component transaction. When components are issued for a manufacturing order, they are removed from inventory and added to WIP.

Issue-from location

The site where the components used in the manufacturing process are stored prior to beginning the manufacturing order, such as with a vendor, or in a department, a warehouse, or another plant.

Issue-to location

The site where the finished product will be stored prior to delivery to the customer, such as in a department, a warehouse, or another plant.

Item type

A code to designate the accounting class for the item, such as inventory, discontinued, and misc. charge.

Item-specific inventory valuation

An accounting method that places a value on each item that you produce, based upon either standard cost or current cost.

Job

A series of business activities that, when completed, will fulfill a high-level objective.

Job category

Groupings that you can create to organize the titles and descriptions of jobs within your company. Each job category must include a set of values that can be used to sort all jobs. For example, you might create a job category called REGION so you could track jobs from specific geographical areas. Values for that job category might be East, West, North and South-or might be states, provinces, countries/regions or other areas.

Job costing element

A type of element that can be linked to a job.

Job costing transaction

An instance of a job element that is linked to a specific job, capturing information about a specific revenue or expense associated with the job. Job costing transactions aren't accounting transactions: they won't affect the General Ledger or any subsidiary ledgers.

Job order

See [Manufacturing order](#).

Job transaction list

A selection of transactions to be applied to a specific job. You can use transaction lists to specify the kinds of transactions that should be applied to jobs, and to specify the transactions to be applied automatically to jobs.

Kit

A group of finished items that compose a set.

Labor code

A code that is used to tie a job function to a specific pay grade. Usually, jobs requiring fewer skills have lower pay grades and are compensated at lower rates. Jobs requiring more skills or education have higher pay grades and higher pay rates.

Labor time

The number of employee hours required to complete the operation.

Lead time

The minimum amount of time required for production of an item.

Location

A work site. Some businesses are organized as a single company or division, but may have multiple sites.

Lot-for-lot

An order policy for ordering the exact quantity needed, provided that the order quantity is between the minimum and maximum order quantities.

Lot-numbered item

Any inventoried item that is part of a group that is assigned a unique identifier, which can be letters, numbers or a combination of letters and numbers.

Lot-number-tracked item

See [Lot-numbered item](#).

Lot-sample size

The number of item units that should be inspected to determine if a group of items meets specifications.

Lot-tracked item

See [Lot-number-tracked item](#).

Low-level code

A code that identifies the deepest level an item has in any bill of materials in your manufacturing records.

Machine

Any tool, device or implement that you use in your manufacturing process.

Machine allocation

The assignment of a machine to a work area. Each allocation record displays available machine hours, the efficiency rating, and utilization rate for that machine. Total scheduled machine hours for the work center are also displayed.

Machine definition

The record of a machine in your plant that allows you to track statistics for each machine, including vendor information, warranty period, and operating costs.

Machine efficiency

A measure of how a machine is suited for a specific task. The higher the efficiency rating, the more effectively the machine works.

Machine time

The number of machine hours needed to complete the operation.

Machine utilization

A measure of how much of the available machine capacity is actually being used. For example, if a machine is capable of producing 100 items per eight-hour day and you are only producing 80 items, the machine utilization rate is 80 percent.

Make item

An item that is produced by your plant.

Make or Buy item

Item that can be bought or manufactured by your company.

Make to order

An order fulfillment method for made items. When make-to-order items are sold, manufacturing orders to build the items required to fulfill the manufacturing orders are created. Manufacturing orders are used to respond to specific sales orders.

Make to stock

An order fulfillment method for made items. When make-to-stock items are sold, the quantities required to fulfill the sales order are taken from inventory quantities. Manufacturing orders are used to keep inventory levels up so that sales orders can be fulfilled.

Manufacturing bill of materials

The bill of materials used to build a parent part in your organization. A manufacturing bill of materials is the “real” bill of materials, and is used to figure material requirements for your organization.

Manufacturing data sheets

See [Routing](#).

Manufacturing order

A set of documents conveying the authority to manufacture parts or products in specified quantities. Manufacturing orders are also called batch cards, job orders, production orders, run orders, shop orders, or work orders.

Manufacturing order receipt

A document where material, labor, and machine costs in WIP are applied to finished goods that are received in inventory. Costs for backflushed materials, labor, and machine time also are applied to the finished goods cost.

Manufacturing order routing

A routing used to complete a specific manufacturing order, which includes all the necessary requirements to fill the order, such as workers, machine time, and raw materials. Also known as “manufacturing routing.”

Manufacturing picklist

A list of the items and quantities of items that are required to fill a manufacturing order.

Material Requirements Planning

A series of data collection and interpretation procedures that allow you to forecast resource requirements over a specified time period (days, weeks or months).

Maximum order size

One of the variables that can be used to calculate order quantities for fixed or period order quantity order policies. Maximum order size puts a limit on the size of automatically generated purchase and manufacturing orders. If demand is greater than the maximum order size, an additional order will be created.

MFG BOM

See [Manufacturing bill of materials](#).

Minimum order size

One of the variables that can be used to calculate order quantities for fixed or period order quantity order policies. It is similar to standard order quantity, and is used in its place if the standard order quantity is zero. If the standard order quantity is greater than zero, the standard order quantity supersedes the minimum order size.

Module security

A way to see if other users are working with records that prevent you from completing certain processes. Module security also allows you to unlock records and remove users from MRP.

Move in

To adjust the due dates of existing manufacturing orders and purchase orders to meet potential shortages identified by MRP calculations. If MRP calculations uncover a shortage of an item and if there’s an existing order for the item in the future, the order will be flagged to be “moved in” to prevent the shortage.

Move out

To reschedule certain manufacturing orders or purchase orders to prevent stock overages on the current due date. An appropriate future date to move the order to cover a future net requirement is proposed

Move time

The number of hours needed to physically move an item to the next operation.

MRP

See [Material Requirements Planning](#).

MRP shortage

A lack of resources to produce the required amount of an item to fill outstanding orders. Manufacturing orders can be entered regardless of current stock of available materials.

Multi-level bill of materials

A bill of materials that lists all the components directly or indirectly involved in building the parent part, together with the required quantity for each item. For example, if a subassembly is used in the parent part, the multi-level bill of materials will show all the components needed to build the subassembly, including purchased parts and materials. *See also* [Single-level bill of materials](#).

Negative WIP

The situation that occurs if you enter and post a manufacturing order receipt where more is consumed from WIP than was in WIP for the manufacturing order. When finished goods are received into inventory before materials have been issued to the order or before labor or machine time data collection transactions have been completed, this can occur. You must set up Manufacturing Order Processing to be able to enter receipts that would cause negative WIP.

Net change regeneration

An MRP process that updates MRP information based on changes to manufacturing orders, sales orders, purchase orders, and inventory quantities. *See also* [Full regeneration](#).

Nettable item

An item, site or item-site combination that is included in MRP calculations.

Non-nettable item

Any item, site, or item-site combination that is not included in MRP calculations.

Non-Standard Report

A report for internal use that summarizes information about defects identified in a group of items. An NSR might also include information about the disposition of the defective items.

NSR

See [Non-Standard Report](#).

Op code

See [Operation code](#).

Operation

A specific task within the manufacturing process. You can use operations as templates for routing sequences.

Operation chart

See [Routing](#).

Operation code

A code assigned to a particular task within the manufacturing process. For example, in a company that makes electrical components, the operation code for testing the validity of a certain characteristic might be "110." Also, op code.

Operation list

See [Routing](#).

Operations sheets

See [Routing](#).

Option

In sales configurator, an option is one of the available choices for some aspect of a configured item. For example, a computer manufacturer might offer 15-, 17- and 21-inch monitors as options for a computer.

Option bill of materials

A bill of materials for a component signifying that the component won't be identical in all finished products.

Option category

A group of related items that customers can choose from, such as various sizes of computer monitors.

Option setting

A setting that controls the information that appears on a report, such as sorting method, detail level, and range restriction.

Order increment

A variable that can be used to calculate order quantities for fixed or period order quantity order policies. The order increment is the number of item units that can be added to the standard order quantity to increase the order size to meet demand.

Order policy

A method for calculating the order sizes of automatically generated purchase and manufacturing orders. Manufacturing includes three order policies: lot-for-lot, fixed order quantity and period order quantity.

Originating currency

The alternate currency that a multicurrency transaction was conducted in. *See also* [Functional currency](#).

Outsourced item

A finished good that requires one or more outsourced services.

Outsourced service

A service that is part of manufacturing processes that is purchased from a vendor.

Outsourcing

The practice of using outside vendors to perform certain manufacturing tasks.

Outsourcing routing

A routing that includes one or more sequences that are completed by an outsourcing vendor.

Outsourcing vendor

A vendor that you purchase outsourced services from.

Outsourcing work center

A work center where outsourced services are performed. An outsourcing work center can be on-site or can be at the vendor site.

Overhead

Costs incurred that cannot be directly related to the products or serviced produced. These costs, such as light, heat, supervision, and maintenance can be grouped and distributed to units of products or services by some standard allocation method.

Parallel routing

A routing that includes some routing sequences that run concurrently.

Parent part

An item built from the component parts. A parent part can be a subassembly or a final product.

Pegging

To trace an item requirement through the MRP system to find the source of the requirement quantity. Pegging will reveal whether a requirement is driven by a manufacturing order, sales order, purchase order or picklist.

Period order quantity

An order policy type that calculates order size for requirements for a period you specify, based on one or more of these variables: standard order quantity, order increment size, minimum order size and maximum order size.

Periodic costing

See [Standard costing](#).

Periodic inventory

An inventory tracking method that involves taking inventory on a recurring basis, such as monthly, quarterly or yearly. This is the same as "standard" costing.

Perpetual inventory

An inventory tracking method that involves constantly updating inventory each time an item is added or removed.

Phantom bill of materials

A bill of materials used to describe the components of a parent part that will be built as part of a higher-level parent part. The term “phantom” is used to indicate that the part never really exists as a stocked item, but is built along with the production of the higher-level part that is driving an overall production order. Creating bills of materials as phantoms allows the manufacturing order picklist and the Material Requirements Planning (MRP) features to explode through the phantom item down to the lower-level parts.

Pick document

A group of component transactions that share a type such as Allocate, Issue, Reverse Issue, and that are posted together. A pick document can include component transactions for multiple manufacturing orders, items, or sites.

Picklist

A list of the items and quantities of items that are required to fill a manufacturing order.

Planner code

A code that identifies the individual responsible for the production of the item.

Planning routing

A routing used to determine resource requirements for a potential manufacturing order. If negotiations with the customer are successful, the planning routing can be converted into an active routing and used to fill a manufacturing order.

Pointer routing

A pointer routing is used to outline a series of steps that are common to all items produced by your plant. For example, if each item needs to be tested by quality assurance, packaged and shipped, a routing can be defined to cover these steps for all items that you manufacture.

Post-to site

The site where the finished product will be stored prior to delivery to the customer. This location can be a department, a warehouse, or another plant.

Primary routing

A routing that provides the instructions for building an item. It is a basis for scheduling and resource estimates. The primary routing information is used to determine the required lead time for manufacturing the product. Each item can have only one active primary routing.

Process security

A type of security that allows you to restrict access to certain procedures or processes within Manufacturing.

Process security set

A password or list of user IDs you define to restrict authority for completing a Manufacturing process. You can use one process security set for all restricted procedures, or you can create different process security sets for different procedures.

Production variance

The difference between the actual and estimated costs for a manufacturing order, based on the working routing, the picklist, and labor and machine codes.

Promise date

The date that the customer has been told to expect receipt of the order.

Promotion

Special pricing offered on a particular option for a configured item.

A special pricing offered on a particular option for a configured item.

Purchase order

A formal request for goods or services. The purchase order shows the quantity of goods ordered, expected receipt date, and supplier name. The purchase order may also include other information pertaining to the delivery of the item, such as Free On Board (F.O.B.) points.

QA Required

A designation for purchased items that must pass a quality inspection before being added to your inventory.

Quantity damaged

The total items, if any, damaged during shipping.

Quantity ordered

The amount of the item requested on a single purchase order.

Quantity received

The amount of the item received from the supplier.

Quantity to fill

An amount of a product that was ordered but has not been received.

Query

A search through a specific set of records for certain information.

Queue time

The number of hours spent waiting for the operation to begin.

The number of hours spent waiting for an operation to begin.

Quick manufacturing order

A manufacturing order that doesn't require you to collect information about labor and machine time and material costs when the order is closed.

Quote

A company's offered price for an item that a customer or a potential customer has requested. Quotes can be transferred to another document type, deleted or voided.

Raw materials

Items used to build products. They can be individual items like nuts, screws and diodes, or they can be subassemblies.

Record

A group of computer data tied together by a common key. (All of one item's information—from quantity and site information to engineering data to bill of materials data—is the item's record.)

Reference designator

Information that specifies where components should be used in an assembly, such as the placement of four resistors on a printed circuit board.

Regular bill of materials

A simple, single-level bill of materials.

Replaced item

An item in a mass update to bills of materials that is removed from bills of materials. A replacement item might or might not be substituted for the replaced item.

Replacement item

An item in a mass update to bills of materials that is added to bills of materials. A replacement item might be an addition to a bill of materials, or might be a substitution for a replaced item.

Return

An item or merchandise returned by a customer to your company. A return decreases the customer's balance on account and, if you choose, increases inventory quantities.

Revalue

To finalize rolled-up standard cost changes. Revaluing replaces existing standard cost information with new standard cost information, which is used in your accounting processes. As you change your standard cost information, you might roll up costs several times, but probably will revalue items only at certain points.

Revenue/expense code

A short identifier used to categorize expenses and revenues linked to a job.

Reverse allocate

A component transaction type where items that have been allocated to a manufacturing order are unallocated. *See also* [Allocate](#).

Reverse Issue

A component transaction type where components that were issued to a manufacturing order (which removes them from inventory and adds them to WIP) are removed from WIP and put again in inventory. *See also* [Issue](#).

Reverse Scrap

A component transaction type where components that were scrapped for a manufacturing order are restored to the issued (and not scrapped) quantity for the order. *See also* [Scrap](#).

Roll up

To apply calculations based on changes to standard cost information to items. If you change the cost of a raw material that is part of several subassemblies and finished goods, “rolling up” that change will result in calculations that will determine the new standard costs of the subassemblies and finished goods.

As you change your standard cost information, you might roll up costs several times, but probably will revalue items only at certain points.

Routing

A detailed set of instructions that describes how to create a particular item. Routings include operations to be performed, the scheduling sequence, machines and work centers involved, and hours required for setup and run times. Routings also can include information about tooling, operator skill levels, inspection needs, testing requirements, and so on.

In engineering change management, a routing is a list of users who must review an engineering change request before it becomes a change order, and who must review a change order before it's finalized.

Routing preference

An individual user choice on how information is displayed or processed for update in the routings subsystem. Preferences can control such actions as substituting one description for another or appending work center operations notes on to routing notes.

Routing sequence

A single step in the manufacturing process. Some routings will contain multiple steps while others will have only a single step. Examples of a sequence include assembly, painting, drying, etc.

Routing sheets

See [Routing](#).

Run labor code

A labor code that identifies the skill requirements to perform the operation as defined.

Run orders

See [Manufacturing order](#).

Sales order

A request for goods or services. Sales orders can be Open (ready to be filled) or Planned (hold pending credit check or other criteria).

Sampling

A statistical process of selecting a portion of a large group of items to be inspected. From the sample you select—and your inspection results for the sample—you can draw inferences about the overall quality of the entire item quantity.

SCAR

See [Supplier Corrective Action Request](#).

Scheduling data

The lead time needed to manufacture an item on a bill of materials and the amount of scrap materials produced by the manufacturing process.

Scheduling preference

A user preference that controls the allocation of resources to a particular manufacturing order. Scheduling preferences identify additional resources that may be available and define waiting periods for a sequence.

Scrap

A component transaction type where components that are issued to a manufacturing order are flagged to be scrapped. Scrapped component costs are applied to the manufacturing order costs, but the quantities aren't.

Sequence number

A number assigned to a particular step in a routing. Each step (or sequence) represents an operation in the manufacturing process. The sequence number controls the order in which steps are executed.

Serial-numbered item

An inventoried item that is assigned a unique identifier, which can be letters, numbers, or a combination of letters and numbers.

Serial-number-tracked item

See [Serial-numbered item](#).

Serial-tracked

See [Serial-numbered item](#).

Setup cost

The cost of preparing a work area for production. Setup costs might include the cost of calibrating machines or gathering the necessary tools and resources.

Setup labor code

A labor code that identifies the skill requirements for the person preparing the work area prior to performing the manufacturing task.

Setup time

The number of hours needed to prepare the work area prior to the operation.

Ship date

The date when a sales order leaves your warehouse or office.

Shipping method

The manner in which the items are transported from the supplier to the manufacturer. Examples of shipping methods include FedEx, rail, air freight, etc.

Shop calendar

A calendar of up and down days—days when the plant is in production and when it isn't—for an entire manufacturing facility.

Shop order

See [Manufacturing order](#).

Shop rate

The average pay rate for the pay grade. It is the figure that is used when labor costs are estimated for a manufacturing order.

Shrinkage

The loss of materials. You might have raw material shrinkage—such as when some component items are defective and can't be used in manufacturing—or you might have parent part shrinkage—such as when not all manufactured items meet your product standards.

Single-level bill of materials

A bill of materials that lists components and subassemblies, including the quantities of each, that make up the parent part. *See also* [Multi-level bill of materials](#).

Site

A location that you have defined for storing items. A site could be a department, a plant, or a warehouse. The number of sites depends on your organizational structure.

Source routing

A previously defined routing that contains one or more steps that you want to use in a new routing.

Standard cost variance

The difference between the actual costs for a manufacturing order for a standard cost item, and the standard cost of the item.

Standard costing

An accounting method used by some businesses to value their inventories. A company that uses standard costing—also known as “periodic costing”—revalues its inventory periodically to reflect significant changes in the cost of its items.

Standard order quantity

A variable that can be used to calculate order quantities for fixed or period order quantity order policies. It is similar to a minimum order quantity, requiring no less than a set amount for an order, but it can be increased, either by increments or multiples of the standard order quantity.

Subassembly

A part that is both a component and a parent part. An assembly that is used in the manufacture of a higher-order assembly.

Super bill of materials

A list of all the component items that can possibly be included the bill of materials for a finished item. For example, a computer manufacturer might develop a super bill of materials that includes several options for hard disks, RAM, monitors, keyboards, mice and other peripherals. No computer can include all the options, but all the options must be included in the super bill of materials.

SUPER BOM

See [Super bill of materials](#).

Supplier

A person or company that supplies goods or services to a manufacturer.

Supplier Corrective Action Request

A formal report to be sent to a supplier to involve the supplier in resolving problems with defective parts. SCARs describe the problems you've found—including item numbers, lot numbers, dates and test results—and might outline possible areas for the supplier to research to prevent the defect from recurring. Suppliers usually are required to respond to the SCAR reports with information about the cause of the defect and the steps to be taken to prevent its recurrence.

Template

A routing outline that you can use to quickly and efficiently build new routings. Each time you need to create a new routing, you can customize the template and give it a unique routing name.

Time fence

The minimum amount of time required for production of an item. When MRP is used to create planned manufacturing orders or purchase orders, the orders automatically are scheduled outside the time fence.

Total costs

The cumulative total of all expenses associated with a manufacturing order, plus any overhead that might not be directly connected to the order.

Trade discount

A price reduction, usually granted to a certain customer because of the customer's special status. Customers with an excellent credit history might be offered a trade discount.

Unit costs

The value of time and resources consumed to create one unit of product for this order.

Unmet forecasted demand

The difference between forecasted demand (the anticipated amount of an item that will be required to meet projected orders) and actual production.

Up day

A day when the facility—the entire shop floor or a specific work center—is in production.

User-defined field

A field that can be used to track information specific to your company.

Valuation method

The process used to track inventory value (FIFO Perpetual, FIFO Periodic, LIFO Perpetual, LIFO Periodic, Average Perpetual).

Variance

The difference between two values, such as the difference between estimated and actual expenses.

Where used

A Manufacturing query that scans your bills of materials and routings to find where items, machines and other things you've defined are used. If you performed a "where used" search for all items in your plant that use a certain machine, for instance, the system would generate a list of all items that have a step involving that machine.

Window security

A system that allows you to specify which windows each user in your organization will be able to use.

WIP

See [Work In Process \(WIP\)](#).

Work center

A self-contained unit of the manufacturing process, or an entire plant. A work center might be an assembly area, a shipping and receiving area or a painting area. Machines and employees are the main components of work centers.

Work center calendar

A calendar of up and down days—days when the plant is in production and when it isn't—for a specific work center.

Working routing

See [Manufacturing order routing](#).

Work In Process (WIP)

A system that helps you to track and analyze the costs associated with a particular manufacturing order and view the progress of the manufacturing order.

Work order

See [Manufacturing order](#).

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