Demo – SERP – Production Module

Preparation

1. Import provided Demo Data.
2. Login with:
   Standard ID: sample@hansaworld.com
   Password: Sample99
3. Go to: Module: Sales Orders >> Register: Sales Orders, open Sales order 21100007. Then move "Sales order date" to last weeks date and "Planned delivery date" to next week Wednesday, then Save
4. Go to: Module: Production.

Script

Welcome to this demonstration of Standard ERP's Production module. Let's take a look at an example process of producing goods needed to fulfill customer orders and maintaining inventory levels of the company.

> ACTION: Go to: Reports >> Deficiency List >> Run

In this case, we have a deficiency of 20 pieces of the Wooden Table. We do not have any in stock to fulfill the quantity ordered by the customer.

Let's check if we have enough materials to produce our table.

> ACTION: Close Deficiency List report. Then go to Reports >> Open Producible List report
>   Enter item - 81000
>   Mark checkbox: Recipes in multiple levels
>   Mark function: Detailed and Run

As seen here, we have enough materials in stock to produce the table. This accounts for the quantities specified in our default production recipe.

The production manager will now let the system propose Production Orders for items needed to produce.

> ACTION: In Personal Desktop go to Archive: Production >> choose Maintenance: Create
>   Planned Records from Ordered Items and show section Create

In the event of a materials deficiency, the system automatically creates Purchase Orders for outstanding quantities in the same step.

> ACTION: Press Run on maintenance
>   Now open Register: Production Orders

As the wooden table consists of a Table Top, an intermediate good, two Production Orders are now created, one for the Table Top, and one for the Wooden Table.

The due dates of production reflect the planned delivery date agreed upon with the customer. The start date is also calculated, taking the Recipe's default production time into account.

With all materials in stock, production can start immediately. Otherwise, default delivery dates would be taken into account as well.

> ACTION: Open Production Order record no. 1

Production Orders help with planning the workflow for each machine on the production floor.

They keep basic information, on what and how much needs to be produced, the time needed, and when productions are due.

The manager can determine if the proposed quantities should be adjusted, due to current needs and from which area materials are deducted.

Production Orders are an additional step and they can be omitted if simpler production processes are required.

When the Production Order is accepted, the system assigns it a queue number, for the related machinery.

> ACTION: Assign Location: PROD, mark Production Order as Accepted, Save and Show field
> Queue
> Move with Top right arrow to Production Order no. 2, Assign Location: WHS, mark it as
> Accepted, Save

The Production Queue Report can be used to check which orders are pending in each machine queue.

> ACTION: Go to Reports >> Production Queue >> Run

This can be displayed graphically as well as using Standard ERP's Resource Planner.

> ACTION: Close report window. Go to Resources

We have two work areas, and our production is held by work area number one.

> ACTION: WA1 >> press button W to show week view

Here we see the occupancy of our production machines. Each recipe can be color-coded, and we see an indication of the hours our machines are not operating.

If machines have alternative production purposes and, if needed, we can move a Production Order from one machine to another using drag and drop.

Now you can see that for this Production Order, the assigned machine and queue number, was changed accordingly.

Now, the production begins.

Production processes can be recorded in the system in various ways.

Production clerks can record their activities directly in Standard ERP, using a variety of devices, including computers, tablets, and smartphones.

ACTION: Press login button from Navigation Centre and log in as AM, password: Sample99

For their convenience, after logging in, a simplified window displays to specify what they are working on.

In our example, he was ordered to work on Production Order number two.

ACTION: Choose Production time button and in Production Order field enter 2, then Save

The System indicates how much should be produced in total for this order.

He can enter the quantity if already produced, or leave to begin producing. In that case, with this step, he simply records the start time of his work.

ACTION: Press Close

When production is finished, he will log the quantity produced and, if applicable, discarded quantity during this shift.

If production was finished, he can set the Production Order as completed.

ACTION: Choose Production time button again
In field Produced enter: 20
Mark checkbox: Set Production Order as finished and Save

In the background, the system created a Production Record for 20 pieces produced.

ACTION: Open Navigation Centre >> Personal Desktop >> Archive: Production >> Register: Production
Show created record (no. 2), open it and show W-cost column and Start and End time entered

We see here, the fixed cost for work was added as was set for this example.

But, on the Production Record, the real Start and End Time was entered as the employee was registering his actions and, if configured this way, that can be used for work cost calculation.

Alternatively, produced quantities can be recorded by shift managers post factum, based on worksheets received from employees.

> ACTION: Log in as SJ >> Navigation Centre >> Archive: Production >> Register: Production
> Orders
> Open order no. 1 and from Operations choose option >> Finish Batch
> Save created production record

If for each production batch, materials are picked from materials location to the production floor, we can register the inventory movements.

> ACTION: Create >> Stock Movement
> Enter the same qty as in Req. Qty in Received Qty column.
> Mark checkbox Received and Save

Now we can finish the production.

> ACTION: Close Stock Movement, mark Production as Finished and Save

We produced 20 Tables. All materials were taken from inventory, and final goods were received. General Ledger was updated accordingly as well.

> ACTION: Operations >> Open NL Transaction, show it and close

Finished goods can be immediately moved from the production floor location to the main sales inventory in order to be shipped to customers.

> ACTION: Create >> Stock Movement
> In Received Qty column Enter the same qty as its shown in column Req.Qty.
> Change Location To from PROD to WHS
> Mark checkbox Received and Save
> Close Stock Movement

In this example, each production was recorded as one step, and we registered two productions.

The production process usually consists of a batch of steps. It may be necessary to register all or some of them to track the precise duration of each action or the current status of the production flow.

Now, we will show you how this scenario can be recorded in Standard ERP.

ACTION: From Production record >> Create >> New Production >> paste special in field
Recipe

We will produce a Table Top again, but we would like to record each production step separately.

For this production, the recipe we will use, contains information about the required materials as well as a routing setup informing the user about each step.

ACTION: Add recipe no 80001B, press enter
Show field: Routing
Change Qty to 5 and Save
Create >> Production Operations, and then Run

Now we can register quantities produced and log time for each activity.

ACTION: From Production >> Operations >> Production status

We see that there are three steps and they are in a queue sequence. In our example, no operation can be done in parallel.

ACTION: Click on operation CUT, and open it, show flip Items and flip Time

Each operation contains information about the material needed in this step as well as planned setup, queue, movement and run time.

When the operation is processed, start and end time are recorded, and the quantity produced for this step is reflected.

ACTION: Change status to Started and Save
Enter in Actual Qty 3
Change status to finished and Save
Close Production operation
Recalculate report

If a partial quantity is produced, the system will create an additional step required to finish that which is outstanding for the order.

If configured to do so, each operation can already reflect costs in General Ledger.

ACTION: Open again operation CUT >> Operations >> Open NL Transaction

There is a range of reports to assist with controlling and planning production processes, and all are available in the Production module.

Thank you for watching this demonstration of Standard ERP's Production module. For more information, please contact your local HansaWorld partner.