Infor CloudSuite Business Printing Industry User Guide

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Contents

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About the Printing Industry Pack

The Printing Industry Pack allows you to estimate the price of a print job based on a variety of factors, such as weight of the paper, dimensions, number of sections, etc. All relevant factors can be accounted for when using the Printing Estimating Workbench form to build a routing and bill of material for an estimate print job.

New printing estimates can be created, existing quotes can be copied, or templates can be used to produce a print quote price for your customer. If they approve the quoted price, you can create an estimate print job with operations and materials based on the factors specified on the Printing Estimating Workbench form. You can create custom formulas which allow you calculate factors such as paper consumption, material usage, and operation setup and run times. You can tailor the estimate job as needed for each customer, then, when the estimate job is ready, you can copy it to a job where it is scheduled for production.

In order to view and use the forms in the Printing Industry Pack, you must purchase and enable the PP Ind Pack license.

The Printing Industry Pack includes these features:

- You can create templates that can be reused with some variations for many different print quotes.
- You can create formulas for common printing tasks.
- You can use the Printing Estimate Workbench to select a template, specify your cost/price requirements, and use formulas to calculate an print quote price. You can also copy the structure and information of a similar, existing quote into the Workbench to create your new quote.
- After you create an estimate job for the quotation, you can display the cost roll-up using the formula calculations. You can then compare this price to the original print quote estimate.
- You can analyze material usage and estimate the quantity of materials used for printing, such as ink and oil, based on the Print Quote Price calculations.
- You can quickly calculate the paper consumed by operations on a printing estimate job.
- You can determine operation setup time and run time for your resources, based on the Print Quote requirements. These values are used on the Estimate Job Operations form.
- You can process batch productions by creating job material transactions, as well as generate unposted job transactions.

Generating Unposted Job Transactions for Batched Productions

1 Open the Generate Unposted Job Transactions for Batch Productions form.

2 Specify a **Batch ID** and **Transaction Type**.

3 Accept the default **Date** or modify it.

4 Specify the transaction details in the enabled fields.

   Note: If the **Use Sheet Qty** field is selected, specify quantities based on the sheet quantity from the Batched Production Operations form. If the **Use Sheet Qty** is not selected, specify quantities based on the job quantity.

5 Click **Generate** to create new unposted job transactions. Quantity and time values are split between the original job operations based on the their proportion of the batch quantity. See the table below for more details.

6 Review a summary of the transactions on the **Unposted Job Transactions Listing** tab, or open the Unposted Job Transactions form to review the details.

7 Post the transactions on the form.

This table shows an example of transaction information that you might specify on this form:

Machine or Labor Hour Values	Job Operation 100	Job Operation 101	Details
Length	10	10	
Width	1	3	
Up Number	4	2	
Adjusted Operation Qty	40	60	(Length * Width) / Up Number
Total Transactions	100	100	Sum of all Adjusted Operation Qty
Portion of Batched Transactions	40%	60%	Adjusted Operation Qty / Total Transactions

Preparing Printing and Packaging Quotations

1. Before you can begin creating quotes for printing and packaging estimates, you must create the initial data. Click each step for more detail.

   a. "Configure Printing Industry Pack parameters" on page 13.

   b. "Specify operation types and codes" on page 17.

   c. "Create operation type formulas" on page 23.

   d. (optional) "Specify operation type code times and materials" on page 19.

   e. (optional) "Create quote templates" on page 29.

2. After the data has been prepared, you can create quotes. Click each step for more detail.

   a. Create an estimate.

   b. "Create a printing quote for the estimate" on page 31.

Print Industry Data Setup

1 Open the Printing Industry Parameters form.

2 Specify the default values for the number of manual holding steps and the number of sides to print.

3 On the **Standard UMs** tab, specify the unit of measures to be used for bulk mass, ream mass, linear dimension, area, and density.

4 On the **Operation Rating Access** tab, select up to 20 different operation ratings. For each rating selected, specify a caption.

5 On the **Operation Rating Values** tab, specify a value for each operation rating selected on the **Operation Rating Access** tab.

6 Save the record and exit the form.

Processing Job Material Transactions for Batched Productions

When you process job material transactions in the Printing Industry Pack, be aware of these situations:

- To reverse a transaction, enter another transaction that reverses the first.
- If the **Warehouse**, **Location**, or **Lot** fields change, the grid on the Pieces tab automatically refreshes to retrieve the corresponding records.
- When you work with by-product items, specify a negative quantity to move the item back into inventory. You cannot add an item as a by-product item if it does not exist in a job bill of material. By-product items cannot be cross referenced.
- For unposted job material transactions, see "Generating Unposted Job Transactions for Batched Productions" on page 9.

To process job material transactions:

1 Open the Job Material Transactions for Batched Productions form.
2 Specify a **Batch ID**. This causes the grid to display all materials associated with the batch.
3 Specify a transaction date and time, or accept the default, which corresponds to the date and time the form was opened.
4 Use the **Select All** and **Deselect All** buttons, or the box next to each material, to specify the materials to process.
5 Specify the **Quantity**, **Unit of Measure**, and **Location** for each selected material.
6 Click **Process** to immediately post the selected materials to their jobs on the shop floor, reduce the item quantity on hand, and increase quantity and costs issued to the batch ID. Batch quantities are split between the original job orders based on the their proportion of the batch quantity.

For example, you might specify this transaction information:

Property	Job 001	Job 002	Details
Job Qty	100	50	
Up Number	2	4	
Scrap Factor	2%	5%	
Adjusted Job Qty	$204.08	$210.52	(Job Qty * Up Number) / (1-Scrap Factor)
Batch Qty	$414.60	$414.60	Sum of all Adjusted Job Qty

Property	Job 001	Job 002	Details
Portion of Batched Production	49%	51%	Adjusted Job Qty / Batch Qty

Setting Up Operation Types and Codes

Operation types describe shop floor tasks used with the printing industry. All types are user-defined, and may include activities such as printing, binding, coating, laminating, window patching, sheeting, packing, gluing, die cutting, stamping, or embossing.

To set up types and codes:

1 Open the Operation Types form.
2 Specify a type code and description.
3 On the **Constants** tab, specify default constants for the selected type.
4 On the **Setup Finish and Run Time**, **Ratings**, **Costs**, and **Other** tabs, enable, and specify a caption for as many attributes as needed (from four to twenty possible fields, depending on the tab). The specifications made here determine what displays on the Operation Type Codes and Estimate Operations forms.
5 Each operation type has a code which describes specific examples of types, and defines factors and formulas used to calculate print quote price. To set up these codes:

   a On the Operation Types form, specify a type and click **Codes** to open the Operation Type Codes form.
   b Specify a code, description, and work center for the selected type.
   c On the **Estimate Workbench** tab, enable the attributes that are relevant to the current type code. When **Price Quotation** is specified as the **Quote Method**, the specifications made here help determine which fields are enabled on the Printing Estimate Workbench form.
   d On the **Setup Finish and Run Time**, **Ratings**, **Costs**, and **Other** tabs, specify values for all fields that you enabled on the Operation Types form.
   e Save the record and close the form.

Specifying Operation Type Code Times

Although operation type code times are optional, it is recommended that you use them.

To specify times for all items associated with the selected type code:

1   On the Operation Type Codes form, select a type code and click **Times**.

2   On the **Setup and Finish** tab, specify amounts for fixed and variable hours, or by using variable hours per original color or special color.

3   On the **Run and Scrap** tab, specify the basis for determining the duration of machine and labor hours for an operation. The run basis is defined using either hours per piece or pieces per hour for machine and labor schedule drivers. Fixed and variable material scrap factors may be specified to determine scrap factor values at the job material level.

4   Save the record.

5   Optionally, to specify alternate values for a specific set of records:

   a   Create a new record.

   b   On **Setup and Finish** and **Run and Scrap** tabs, specify the alternate values.

   c   Use the **Optional Matching Criteria** fields to specify when to use the alternate values. For example, specify an item to use the alternate values for operations that involve only the selected item. Specify a **Tier Sheet Count** amount to use the alternate values for operations whose sheet count equals, or exceeds, the **Tier Sheet Count** amount.

   Note: In the event that several alternate sets of values use the same tier field (for example, **Tier Sheet Count**), the system uses the set of values whose tier amount is closest to, without going over, the actual operation amount.

6   Save the record and close the form.

Specifying Operation Type Code Materials

Although operation type code materials are optional, it is recommended that you use them.

To specify materials for all items associated with the selected type code:

1   On the Operation Type Codes form, select a type code and click **Materials**.
2   Select an item to associate with the selected type code. You can select both inventory and non-inventory items.
3   In the **Std Consumption Rate** field, specify the standard rate of consumption for the selected material when used with the selected type code.
4   In the **Number of Dimensions** field, specify the number of dimensions required when calculating the quantity of material used.
5   Select the **Divide by Up** field to divide the **Material Usage** quantity by the **Up** value, which is defined on the Estimate Job Orders and Estimate Operations forms. Clear this field to ignore the **Up** value when determining the **Material Usage** quantity.
6   Select the **Use for Matching Criteria** field to cause the system to consider the selected item when matching type code times. Clear this field to ignore the selected item when matching type code times.
7   Save the record and close the form.

Setting Up Operation Type Formulas

When preparing quotes for printing and packaging jobs, you can create formulas for each combination of **Operation Type** and **Formula Type** on the Operation Type Formula Workbench.

To create a new formula:

1 Open the Operation Type Formula Workbench form.

2 Ensure that a formula does not already exist for the desired **Operation Type** and **Formula Type** combination.

If a formula already exists, see "Modifying an Existing Operation Type Formula" on page 27.

3 Create a new record and specify the **Operation Type** and **Formula Type**.

For information about each type of formula, see "Formula Types Used in Printing Industry Operations" on page 25.

4 Save the record. If a formula already exists for the selected operation and formula types, an error displays and the record is not saved. The buttons on this form are not enabled until the record is saved.

5 Click **Pending Formula Definition** to open the Pending Formula Definition form, where you define the formula.

6 For each sequence in the formula, specify a **Formula Term Group** and **Formula Term**.

7 Click **OK** to return to the Operation Type Formula form. The formula you created now displays in the **Pending Formula** field.

Note: The pending formula is a hypothetical formula. Only the committed formula is used to calculate quotations.

8 If you are satisfied with the formula, and want to begin using it to calculate quotations, click **Commit** to copy the pending formula to the **Committed Formula** field.

Formula Types Used in Printing Industry Operations

There are six formula types that can be created or maintained on this form. Each type has several term groups associated with it.

Formula Type	Description	Formula Term Groups
Price Quotation	This formula type determines the price at the quote line level that shall be used to roll up the print quote price on the estimate line.	Operators, Parameters, Operation Types, Operation Type Codes, Quote Headers, Quote Lines
BOM Pricing	This formula type determines the operation price at the job operation level that shall be used to roll up the print quote price for each job header that, in turn, is used to assign the value for print quote price on the estimate line.	Operators, Parameters, Operation Types, Operation Type Codes, Jobs, Job Routes
Paper Consumption	This formula type determines the paper consumption quantity at the job operation level that shall be used to roll up the paper consumption quantity for each job header.	Operators, Parameters, Operation Types, Operation Type Codes, Jobs, Job Routes
Setup Time	This formula type determines the set up hours for the job operation.	Operators, Parameters, Operation Types, Operation Type Codes, Jobs, Job Routes
Finish Time	This formula type determines the finish hours for the job operation.	Operators, Parameters, Operation Types, Operation Type Codes, Jobs, Job Routes
Run Pieces	This formula type determines the pieces per hour for the job.	Operators, Parameters, Operation Types, Operation Type Codes, Jobs, Job Routes

Modifying an Existing Operation Type Formula

While you cannot modify a committed formula, you can copy the formula into the **Pending Formula** field, then modify that formula.

1 Open the Operation Type Formula Workbench form.

2 Select a new record that already has a committed formula.

3 Click **Retrieve Committed** to copy the contents of the **Committed Formula** field to the **Pending Formula** field.

   Note: The pending formula is a hypothetical formula. Only the committed formula is used to calculate quotations.

4 Click **Pending Formula Definition** to open the Pending Formula Definition form.

5 Modify the formula sequences, in the formula, specify a **Formula Term Group** and **Formula Term**.

6 Click **OK** to return to the Operation Type Formula form. The formula you modified now displays in the **Pending Formula** field.

7 If you are satisfied with the formula, and want to begin using it to calculate quotations, click **Commit** to copy the pending formula to the **Committed Formula** field.

Working With Quote Templates

Quote templates are not required, but allow for the definition of data for common printing industry jobs, which are used on the Printing Estimate Workbench form.

To set up quote templates, sections, and operations:

1 Open the Quote Templates form.

2 Create a new record.

3 Specify an identifier and a description for the new quote template.

4 Specify the minimum sheet count required to use this template.

5 Save the record.

6 Click **Sections** to open the Quote Template Sections form.

7 Add a section to the quote template.

8 Specify the section number and description.

9 Specify an item and quantity.

10 Add additional sections as needed.

11 Click **Operations** to open the Quote Template Operations form.

12 On the **General** tab, specify the **Operation**, **Operation Type**, and **Operation Type Code**.

13 On the **Paper**, **Color**, and **Operation Data** tabs, specify additional information as needed.

14 Repeat steps 12 and 13 for each section in the template.

15 Save the record and close the form.

Creating a Printing Quote From an Estimate

To create a printing quote from an estimate:

1 Open the Printing Estimate Workbench.

2 Specify an estimate number and line. If a quote already exists for the estimate line, then the **Quote Method**, **Quote Type**, and **Source** fields, as well as the **Process** button, are disabled. In this case, skip to step 6.

3 Specify the **Quote Method**. If you specify **Price Quotation**, the workbench generates a quote that determines the price on the estimate line. If you specify **BOM Pricing**, the workbench generates an Estimate Job Order record.

4 If the estimate status is Working, specify a **Quote Type**. Choose from **New Quote**, **Existing Quote**, or **Quote Template**. If you specify **Quote Template** or **Existing Quote**, use the **Source** field to specify the template or existing quote. If you specify **New Quote**, the **Source** field remains disabled.

5 Click **Process**.

6 In the Sections and Operations sections, add sections and operations, or modify existing records, as needed.

7 Save the form to update the **Print Quote Price** and **Cost Roll** fields.

8 Close the form.

9 Open the Estimate Lines form.

10 Specify the appropriate record and view the **Printing** tab.

11 Specify the fields that the Printing Estimate Workbench did not.

12 Save the record and close the form.

Information entered before saving the quote displays on the Estimate Lines and Estimate Job Orders forms, where you can update them as needed.