



# Infor CloudSuite Industrial Printing Industry Pack User Guide

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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 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 **Post Job Transactions** 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

## Create Printing Quote Data

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

- 1 Configure Printing Industry Pack parameters.
- 2 Specify operation types and codes.
- 3 Create operation type formulas.
- 4 (optional) Specify operation type code times and materials.
- 5 (optional) Create quote templates.

## Create Quotes

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

- 1 Create an estimate.
- 2 Create a printing quote for the estimate..



# Configuring Print Industry Parameters

- 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

- 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.  
 Note: To reverse a transaction, enter another transaction that reverses the first.
- 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 their proportion of the batch quantity.

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
Portion of Batched Production	49%	51%	Adjusted Job Qty / Batch Qty

## By-products

When working with by-product items, enter 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.

## Pieces tab

If the **Warehouse**, **Location**, or **Lot** fields change, the grid on the **Pieces** tab automatically refreshes to retrieve the corresponding records.

## Unposted Job Transactions

- 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.
- 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 **Post Job Transactions** form.

# 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:

- 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.

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:

- 1 On the **Operation Types** form, specify a type and click **Codes** to open the **Operation Type Codes** form.
- 2 Specify a code, description, and work center for the selected type.
- 3 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.
- 4 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.
- 5 Save the record and close the form.





# Specifying Operation Type Code Times and Materials

While operation type code times and materials are optional, it is recommended that you use them.

## Specify Times

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**. The **Operation Type Code Times** form displays.
- 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.

(optional) To specify alternate values for a specific set of records:

- 1 Create a new record.
- 2 On **Setup and Finish** and **Run and Scrap** tabs, specify the alternate values.
- 3 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.

- 4 Save the record and close the form.

## Specify Materials

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**. The **Operation Type Code Materials** form displays.

- 2 Select an item to associate with the selected type code. You may 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. Deselect this field if you 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. Deselect this field to ignore the selected item when matching type code times.
- 7 Save the record and close the form.

# Creating 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**.

## 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 *Modify an Existing Formula*.
- 3 Create a new record and specify the **Operation Type** and **Formula Type**. For information about each type of formula, see *Operation Type Formula Workbench*.
- 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.
- 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.
- 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.

## Modify an Existing 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.
- 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.

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