Infor Factory Track for SyteLine User Guide

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Contents

Infor Factory Track

This module includes topics that describe the forms in the Infor Factory Track application.

About Infor Factory Track

Infor Factory Track is a comprehensive production automation solution designed specifically for the manufacturing industry. Using Factory Track, manufacturers can manage inventory, track labor, and automate their time and attendance operations. The solution is built on Mongoose, an innovative, rapid application-development-technology platform that lets you easily enhance and extend core applications. Factory Track comprises three modules:

- The Shop Floor module is a work center automation solution that provides paperless manufacturing capabilities. Shop Floor delivers a kiosk-based solution that can be accessed by multiple production floor operators to track labor, Report job operations, and track work-in-progress and finished goods.
- The Warehouse Mobility module delivers a real-time inventory management solution with barcode support for ease of use. Using Warehouse Mobility, manufacturers can automate various inventory operations, such as receiving, material movement, cycle counting, and issuing of material.
- The Time Track module is a comprehensive time and attendance application. Because nearly every manufacturer has specific attendance and labor rules, Time Track provides a configurable solution that allows organizations to set up their own rules concerning attendance and labor, such as shift duration, labor management, absence management, and timesheet tracking.

Infor Shop Floor

This module includes topics that describe the forms in the Infor Shop Floor application.

Overviews and Procedures

This module includes topics that describe Infor Shop Floor features and how to use them.

About Shop Floor

Infor Shop Floor is a paperless shop floor operations system featuring full touch-screen, barcode scanning, and label printing support for deployment on the shop floor. Users input labor and material transaction information directly from the shop floor. Infor Shop Floor formats the data and transmits it to your ERP system. When the Infor Time Track Module is implemented, users can also perform time and attendance transactions using the same streamlined touch-screen interface.

For information about accessing Shop Floor using a Web browser, see Accessing Shop Floor and Warehouse Mobility Transactions.

Kanban Overview

You can use Infor Shop Floor to manage your Kanban system. Each Kanban is associated with an item, location, and replenishment cycle. When a Kanban is empty, you can create a replenishment request. Kanban replenishment requests always have a status to indicate their current place in the replenishment cycle:

- **Requested**: the request has been created and is awaiting fulfillment
- **Ordered**: a purchase order or transfer order has been created to fill the request
- **Staged**: items are ready to be moved from the staging area to the Kanban replenishment location
- **Closed**: the request has been filled

Note: Replenishment requests may also have a status of **Error** if there is a system error associated with the request.

After you set up your Kanban system, you can use touch-optimized transaction forms to create and fill Kanban replenishment requests on the shop floor. You can use the Kanban Label Printing form to print barcode labels for Kanbans. If you have the Warehouse Mobility module implemented, you can also use mobile scanner devices to perform Kanban replenishment transactions.

Replenishing Kanbans

There are four sources that can be used for Kanban replenishment:

- inventory

See "Replenishing Kanbans from Inventory" on page 51.

- just-in-time production

See "Replenishing Kanbans with Just-In-Time Production" on page 52.

- purchase orders

See "Replenishing Kanbans with Purchase and Transfer Orders" on page 52.

- transfer orders

See "Replenishing Kanbans with Purchase and Transfer Orders" on page 52.

You can use the Kanban Replenishment Status form or the Kanban Status mobile scanner transaction to view the status of replenishment requests. See "Viewing the Status of Kanban Replenishment Requests" on page 98 or Viewing the Status of Kanban Replenishment Requests Using a Mobile Scanner Device for more information.

Labor and Material Transactions Overview

You can use Shop Floor to perform labor and material transactions. All labor and material transaction forms are designed for use with a touch screen or mouse, and you can also use scanners to input data. There are two primary navigation forms from which employees can access labor transaction forms: the Work Center Navigation Home form, which also includes material transactions, and the Work Center form, which only involves labor transactions. The Work Center Navigation Home form provides links for employees to all labor and material transaction forms using a touch-optimized interface. The Work Center form provides a list of available and active jobs and allows employees at a work center to perform labor transactions involving a selected job either by opening the relevant transaction form, with the job information pre-filled, or by executing the transaction directly from the Work Center form.

You can perform these labor transactions:

- "Start Setup" on page 114 : start setup activities for a job operation
- "End Setup" on page 104 : stop setup activities for a job operation
- "Start Run" on page 114 : start a job operation
- "End Run" on page 103 : stop a job operation and report any completed or moved quantities
- "End Run Only" on page 104 : report completed or moved quantities for a job that has not started
- "Start Indirect" on page 113 : start an indirect task
- "End Indirect" on page 102 : stop an indirect task
- "Start Just-In-Time" on page 113: start Just-In-Time production
- "End Just-In-Time" on page 102 : stop Just-In-Time production
- "Start Machine" on page 113 : start a job operation for a machine
- "End Machine" on page 103 : stop a job operation for a machine and report any completed or moved quantities
- "Start Production Schedule" on page 113: start a production schedule
- "End Production Schedule" on page 103: end a production schedule
- "Start Project Labor" on page 114 : start reporting labor hours for a project
- "End Project Labor" on page 103: stop reporting labor hours for a project
- "Start Service Labor" on page 114 : start reporting labor hours for a service order
- "End Service Labor" on page 104: stop reporting labor hours for a service order
- "Start Team Run" on page 115 : start a job operation for a team
- "End Team Run" on page 104 : stop a job operation for a team and report any completed or moved quantities
- "Team Member Reporting" on page 116 : stop a job operation for a team and report any completed or moved quantities; quantities reported are evenly distributed among all team members
- "Workset Maintenance" on page 118 : start and stop worksets, and add and remove job operations, tasks, activities to worksets

You can perform these material transactions:

- "Job Material Issue" on page 105 : issue material to jobs
- "Job Material Return" on page 105 : return materials from a job operation back into inventory
- "Job Move" on page 106 : move completed items from one operation to the next

- "Job Receipt" on page 106 : receive completed items from jobs into inventory
- "Work Center Material Issue" on page 117 : issue material to work centers
- "Just-In-Time Production" on page 107 : receive completed items into inventory that are not associated with a job or production schedule
- "Production Schedule Receipt" on page 111 : receive completed items from production schedules into inventory
- "SRO Material" on page 112 : issue material to and recall material from service orders
- "Visual Serial Assignment" on page 116: assign serialized component material to a serialized end item

Managing Worksets

Worksets allow employees who are workset eligible to have multiple jobs running at the same time. You can start worksets for a team or for a single employee. You can perform these activities using the Workset Maintenance form:

- "Adding Jobs to Worksets" on page 15
- "Removing Jobs from Worksets" on page 51
- "Starting Worksets" on page 72
- "Stopping Worksets Using the Work Center Form" on page 86
- "Viewing Workset Details" on page 99

Note: You cannot add just-in-time production orders or production schedules to worksets.

Work Center Efficiency Overview

You can use work center efficiency levels to assess productivity at a work center. Work center efficiency levels indicate how well a work center is keeping up with the scheduled production progress at a specified time interval. Work center efficiency is the percentage of production quantities for a job operation that have been completed at a user-defined time interval as measured against the quantity scheduled for completion by that interval. This is the basic equation used to calculate work center efficiency:

Efficiency percentage = ((100 / scheduled quantity) * completed quantity)

The scheduled quantity in the equation above is a prorated value. It represents the quantity expected to be completed by the current elapsed time as a proportion of the total quantity and total time scheduled for the operation. The efficiency percentage is calculated and re-calculated at a user-defined refresh interval during the course of the operation. For example, suppose an operation is scheduled to complete 10 items in 5 hours, and the refresh interval is 1 hour. 1 hour after the operation is started, 2 items are expected to be completed (10 items / 5 hours = 2). If only 1 item has been completed by the 1-hour interval, the efficiency will be 50% per the efficiency equation above: 50 = ((100 / 2) * 1). At the next interval, 2 hours after the operation is started, 4 items are scheduled to be completed ((10 items / 5 hours) * 2 hours = 4 items). If 3 items were completed during the second hour, then the total completed quantity at the 2-hour interval is 4. The calculated efficiency at the 2-hour interval will then be 100%: 100 = ((100 / 4) * 4). Then, if only 1 item is completed during the third hour, the efficiency at the 3-hour interval will be 83.3%: 83.3 = ((100 / 6) * 5). This efficiency value indicates that the work center has completed 83.3% of the work that was scheduled to be completed after 3 hours.

You can use the Job Status form to view the efficiency percentages calculated for a work center at each refresh interval. See "Viewing the Status of Jobs" on page 96 for more information. To define the refresh interval for a work center, see "Configuring Work Center StatusParameters" on page 21. Efficiency calculations cannot be performed for worksets.

Adding Indirect Tasks to Worksets Using the Work Center Form

Only workset-enabled employees can add indirect tasks to worksets.

To add an indirect task to your workset:

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default.
4. Select **Add Indirect** . The Workset Maintenance form is opened. Use the Workset Maintenance form to add the task to your workset. See "Managing Worksets" on page 12 for more information.

Adding Items to Containers

Use the Build Container form to add items to containers.

Note: You can only use the Build Container form if you do not have the Time Track module implemented.

The warehouse mobility icon based menu and list based menu comprises of the Move it. Build Container is listed as a transaction under the Move it.

On the Move it module to add items to a container:

1. Select **Build Container**.
2. Specify or review this information:

   Container
   Scan a container.

   Whse
   If you are adding items to a new container, select the warehouse where the container is located. If you are adding items to an existing container, the warehouse is displayed.

   Location
   If you are adding items to a new container, scan the location of the container. If you are adding items to an existing container, the location of the container is displayed.

   Item
   Scan an item to add to the container. The item description is displayed.

Available
The available quantity of items is displayed.

Qty
Specify the quantity to place in the container.

3 If applicable, select a lot number on the **Lot/Serial** tab.
4 If applicable, specify the lot number in the **Confirm Lot** field.
5 If applicable, the quantity of serial numbers that have not been specified are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To specify the serial numbers of the items you are adding to the container, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must specify all unassigned serial numbers to add the items.
6 To add the specified item quantity to the container, select the green process button. If this form is configured to print labels, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form

Adding Job Operations and Setup Activities to Worksets Using the Work Center Form

Only workset-enabled employees can add job operations, setup activities, or labor reporting to worksets.

Note: You cannot add Just-In-Time production orders or production schedules to worksets.

To add a job operation, setup activity, or labor reporting to your workset:

1 Open the Work Center form.
2 In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3 In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default.
4 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.
5 Select an operation from the **Job List** tab, a project from the **Project Labor** tab, or a service order from the **Service Labor** tab.
6 Select **Add Run** or **Add Setup**.

   If the **Work Center Popup Enabled** parameter is cleared, the operation, activity, or labor reporting is added to your workset. If the workset is running, the operation, activity, or labor reporting is started.

   If the **Work Center Popup Enabled** parameter is selected, the Workset Maintenance form is opened. Use the Workset Maintenance form to add the operation, activity, or labor reporting to your workset. See "Managing Worksets" on page 12 for more information.

Adding Job Routing Notes

You can link relevant notes, such as special instructions, to a job using the Add Job Routing Notes form. You can only access this form from the Work Center form.

To add job routing notes:

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The operations that are ready to be started are displayed on the Job List tab. To view the operations, tasks, and activities on which you are currently working, select the **Active Transactions** tab.
4. Select an operation, task, or activity from the **Job List** tab or the **Active Transactions** tab.
5. Select **Notes**. The Job Routing Notes form is opened. The titles of any notes for the selected operation are displayed in the Subject section.
6. Select the add note button next to the note field.
7. Specify this information:

   Subject
   Specify a subject title for your note.

   Internal
   Select this check box to designate the note for internal audiences only.

   Note
   Specify the content of your note.

8. Select the green process button.

Adding Jobs to Worksets

You can add operations, tasks, activities, projects, and service labor to a workset before or after it is started. Operations, tasks, activities, projects or service labor added to a running workset are automatically started.

Note: You cannot add just-in-time production orders or production schedules to worksets.

1. Open the Workset Maintenance form.
2. In the **Type** field, select **Employee** or **Team**.
3. Specify your team or your badge ID.
4. Optionally, select **Refresh Workset** to view the workset associated with the specified team or badge ID. The operations and tasks in the workset are displayed in the grid on the **Workset** tab.
5. In the **Order Type** field, select one of these options:
   - **Run** : add a job operation
   - **Indirect**: add an indirect task

- **Project**: add project labor
- **Setup**: add a setup activity
- **SRO**: add service labor

a For **Run** or **Setup** , specify a job, job suffix, and operation. The item number is displayed.
  - The **Res ID** field is displayed only if the **Order Type** field is to **Run** or **Setup**.
  - The **machine resource** field is displayed if the **Order Type** field is to **Run** or **Setup** and the **Combine Labor and Machine Time** check box is selected.

b For **Indirect**, select a task code.

c For **Project**, specify a project number, task code, and cost code.

d For **SRO**, specify a partner ID, service order number, line number, and operation.

6 Optionally, to view details for the selected operation or task, select the **Add Details** tab.

7 For **Run** and **Setup** transactions, the employee can select the **Combine Labor and Machine Time** check box to report machine time as a ratio of labor time. When FT Time Track module is implemented the employee can specify the ratio using the **Machine Ratio** field , that is displayed when **Combine Labor and Machine Time** is checked..

8 The machine ratio determines what portion of the reported labor time must be reported for the machine. For example, a ratio of **.5** must report half the reported labor time for the machine. If the Time Track module is not implemented and the **Combine Labor and Machine Time** check box is selected, machine time must always be reported as a one-to-one ratio to labor time.

9 Select **Add**.

Adding Team Members

Use the Team Maintenance form to add team members using Shop Floor. To access the Team Maintenance form, you must be assigned to the **Administrator**, **Supervisor**, or **TeamLeader** permission group. An employee can only be a member of one team. If you are trying to add an employee to a team who is already a member of another team, you must first remove that employee from the other team. If a team is currently working any jobs, any employee added to the team will be assigned to those jobs.

To add team members using the Time Track module in Infor Factory Track, see Adding Team Members Using Time Track.

1 Open the Team Maintenance form.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

3 Specify the team name or team badge ID.

4 Optionally, to view jobs on which the team is currently working, select the **Jobs** tab.

5 On the **Members** tab, select **Add a New Member**. A new line is created in the grid.

6 In the **Employee** field on the new line, specify an employee ID.

7 On the **Members** tab, select **Save**. The employee is added to the team.

Assigning Serial Numbers

Use the Serial Number Assignment form to assign serial numbers to items being received, issued, or returned. You can open the Serial Number Assignment form by clicking the serial number arrow button on any of these parent forms:

- Build Container
- Empty Container
- End Run
- End Run Only
- End Machine
- End Team Run
- Job Receipt
- Job Material Issue
- Job Material Return
- Job Move
- Just-In-Time Production
- Production Schedule Receipt
- QCS Disposition
- Team Member Reporting
- Work Center Material Issue

To assign serial numbers to items:

1. On the parent form, select the arrow button to open the Serial Number Assignment form. The item number and description from the parent form is displayed along with the required, selected, and remaining quantities.

   Note:

   - The Items or component page displays this label: `1 of 1 Assigned` to indicate the number of assigned items.
   - If the item assignment screen displays a job or end item without components assigned, the application displays this message: `No Components Assigned`.

2. Optionally, generate or specify serial numbers. To generate serial numbers, select **Generate**. Serial numbers are generated for the remaining item quantity. You can only generate serial numbers for items that you are receiving. To specify serial numbers, scan serial numbers in the **Serial Entry** field. The generated or specified serial numbers are selected in the grid.
3. In the grid, select the serial numbers you are assigning. If you generated or specified serial numbers, they are already selected. To deselect serial numbers, select **Un-Select All**.
4. To assign the selected serial numbers, select the green process button. To close the form without assigning serial numbers, select the **Close** button.

Assigning Serialized Components to an End Item

Use the Visual Serial Assignment form to assign serialized component material to a serialized end item.

1 Open the Visual Serial Assignment form.
2 In the field marked with a factory icon near the top of the form, select a work center to only display jobs associated with that work center. Optionally, leave this field blank to display all jobs.
3 From the jobs list, select a job to which to assign material. A list of the end items included in the job is displayed. This information is displayed for each end item:
   - item number
   - item description
   - serial number
   - whether material is needed or the material requirements have been filled
   - number of components that still need to be assigned to this item

   Note: To return to the jobs list, select the back arrow or the Jobs hyperlink.
4 Select an end item to which to assign material. A list of all component material needed for the end item is displayed. This information is displayed for each component:
   - item number
   - item description
   - whether the component is still needed or the requirement has been filled
   - the quantity needed and the quantity installed

   Note: To return to the end item list, select the back arrow. To return to the jobs list, select the Jobs hyperlink.
5 Select a component to which to assign serialized material. A list of assigned and needed components is displayed. The serial number is displayed for assigned components. Needed components are labeled Not Installed. Locations where the needed material is available are also displayed.

   Note: To return to the components list, select the back arrow. To return to the jobs list, select the Jobs hyperlink.
6 Optionally, to unassign components from the end item, select the red X button next to the component.
7 Select an inventory location. A list of component serial numbers that are available at that location is displayed.
8 To assign a serialized component to the end item, select the green + button next to the component serial number. The component is assigned to the item and marked with the label Just Updated.

Backflushing Lot Material for Job Operations

Use the Backflush Lots form to issue backflush lot material to job operations. If you are working on an operation and completing material for an item that is lot-controlled and designated for backflushing, you can open the Backflush Lots form by selecting **Backflush Lots** on the parent transaction form.

The Backflush Lots form can be opened from these parent transactions: End Run, Job Move, and Job Receipt.

1 To open the Backflush Lots form, select **Backflush Lots** on the parent transaction form.
2 In the Backflush Item section, select an operation for which to backflush material. This information is displayed for each operation:
    - operation number
    - item number and description
    - **Target Qty**: quantity required
    - **Selected Qty**: quantity currently being backflushed for the operation
3 In the Backflush Item Inventory section, select one or more lots from which to backflush material. This information is displayed for each lot:
    - lot number
    - unit of measure
    - on hand quantity
4 In the **Selected Qty** field for each selected lot, specify the quantity to backflush. You must backflush a total quantity that matches the backflush quantity of the operation.
5 Select **Assign**. Material from the selected lots is backflushed to the selected operation.
6 Optionally, follow the steps above to assign material to another operation.
7 Select the green process button.

Backflushing Serialized Material for Job Operations

Use the Backflush Serials form to backflush serialized lot material to job operations. If you are working on an operation and completing material for an item that is serial-controlled and designated for backflushing, you can open the Backflush Serials form by selecting **Backflush Serials** on the parent transaction form. The Backflush Serials form can be opened from these parent transactions: End Run, Job Move, and Job Receipt.

1 To open the Backflush Serials form, select **Backflush Serials** on the parent transaction form.
2 In the Backflush Item section, select an operation for which to backflush material. This information is displayed for each operation:
    - operation number
    - item number and description
    - **Target Qty**: quantity required
    - **Selected Qty**: quantity currently being backflushed for the operation
3 In the Backflush Item Inventory section, select one or more serial numbers to backflush. You must backflush a total quantity of serial numbers that matches the backflush quantity of the operation.
4 Select **Assign**. The selected serial numbers are backflushed for the selected operation.
5 Optionally, follow the steps above to assign serial numbers to another operation.
6 Select the green process button.

Configuring Document Integration Parameters to Display Doc-Trak Documents

Use the Document Integration Parameters form to configure parameters for integration with Doc-Trak, allowing users to view documents from Doc-Trak from within the Infor Factory Track interface.

1. Open the Document Integration Parameters form.
2. Select the **Doc-Trak Implemented** check box.
3. Specify this information:

   Database Server Name
   Specify the name of the SQL server that contains the Doc-Trak database.

   Database Name
   Specify the name of the Doc-Trak SQL database.

   Site Name
   Specify the site name for the Doc-Trak environment.

4. To generate views for Doc-Trak-related tables, click **Generate Doc-Trak Views**. You must generate views when configuring the Doc-Trak database connection for the first time. Optionally, after configuring the initial connection, you can click **Generate Doc-Trak Views** anytime to delete existing views for Doc-Trak-related tables and re-create them.
5. To ensure the connection between Infor Factory Track and the Doc-Trak database is configured correctly, click **Test Doc-Trak Connection**.

Configuring Document Integration Parameters to Display PLM Documents

Use the Document Integration Parameters form to configure parameters for integration with PLM, allowing users to view documents from PLM from within the Infor Factory Track interface.

1. Open the Document Integration Parameters form.
2. Select the **PLM Implemented** check box.
3. Specify this information:

   Database Server Name
   Specify the name of the SQL server that contains the PLM database.

   Database Name
   Specify the name of the PLM SQL database.

   Site Name
   Specify the site name for the PLM environment.

4. To generate views for PLM-related tables, click **Generate PLM Views**. You must generate views when configuring the PLM database connection for the first time. Optionally, after configuring the initial connection, you can click **Generate PLM Views** anytime to delete existing views for PLM-related tables and re-create them.
5. To ensure the connection between Infor Factory Track and the PLM database is configured correctly, click **Test PLM Connection**.

Configuring the Work Center Navigation Home Form

Use the Work Center Home Page Configuration form to configure the Work Center Navigation Home form. You can add or modify buttons that open forms or run form scripts. You can decide how to organize these buttons and customize their appearance.

1 Open the Work Center Home Configuration form.
2 To create a new button, click the **New** button in the toolbar. To modify an existing button, select it from the grid.
3 Specify this information:

   Category
   Select an organizational category for the button. For buttons delivered with the product by Infor, this field is read only.

   Menu Sequence
   Specify a number to define the sequence in which the button will display in the Work Center Navigation Home menu. Lower numbers will display first. If multiple buttons share the same sequence number, they will be arranged alphabetically.

   Menu Description
   Specify a label to display for the button.

   Action Type
   Select an action type to run when the button is tapped or clicked:

   - **Run Form**: Opens a form
   - **Run Form Script Method**: Executes a form script method available in the Work Center Navigation Home form

   Note: For buttons delivered with the product by Infor, this field is read only.

   Action Name
   Specify the name of the form or form script method to run. For buttons delivered with the product by Infor, this field is read only.

   Menu Icon
   Right-click in this field and select **Load Picture** or **Remove Picture**. To load a new picture, select a JPG or JPEG file after clicking **Load Picture**.

4 Click **Save**.

Configuring Work Center Status Parameters

Use the Work Center Status Parameters form to configure efficiency levels and refresh intervals for work centers. If you do not configure efficiency levels and refresh intervals for a work center, the generic values on the Transaction Set Maintenance form will be used for that work center. For more information about efficiency levels and refresh intervals, see "Work Center Efficiency Overview" on page 12.

1 Open the Work Center Status Parameters form.

2 Create a new parameter set for a work center or select an existing parameter set to modify:
   a To create a new parameters set, click **New**.
   b To modify an existing parameter set, select a work center from the grid.
3 Specify or review this information:

   Work Center
   If you are creating a new parameter set, select a work center. All work centers in your ERP system are available in the drop-down menu. If you are modifying an existing parameter set, the work center name and description are displayed.

   Refresh Interval
   Specify how often the efficiency percentage should be calculated.

   High Efficiency Level
   Specify the minimum efficiency level that must be reached for a work center to be operating at high efficiency.

   Medium Efficiency Level
   Specify the minimum efficiency level that must be reached for a work center to be operating at medium efficiency. Work centers that have efficiency percentages below this value are operating at low efficiency.

4 Click **Save**.

Creating Kanbans

Use the Kanban Item Locations form to create Kanbans. Before you can create Kanbans for an item, you must define a replenishment location and configure a replenishment cycle for the item. See "Defining Kanban Locations" on page 24and"Defining Kanban Replenishment Cycles" on page 24 for more information.

1 Open the Kanban Item Locations form.
2 Select a Kanban item-location combination from the grid at the left. The Kanban item, location, and replenishment cycle details are displayed. The value in the Max Number of Kanbans field indicates how many Kanbans can exist for this item-location combination.
3 To create Kanbans for this Kanban item-location combination, click **Generate Kanban(s)**. If the maximum number of Kanbans for this item-location combination has not been met, Kanbans are created to bring the total number of Kanbans up to the maximum. Newly created and existing Kanbans are displayed in the grid in the Kanban section. The request number and status for any current replenishment requests associated with the Kanbans are also displayed. To print labels for new Kanbans, see "Printing Kanban Labels" on page 40.

Creating Teams

Use the Team Maintenance form to create teams using Shop Floor. To access the Team Maintenance form, you must be assigned to the **Administrator**, **Supervisor**, or **TeamLeader** permission group.

To create teams using the Time Track module in Infor Factory Track, see Creating Teams Using Time Track. If you have both the Shop Floor and Time Track modules implemented, you must use the Team Maintenance form in Shop Floor to create teams. Teams created using Time Track are not compatible with Shop Floor.

1 Open the Team Maintenance form.
2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3 Select **Create a New Team**.
4 Specify a team name and description.
5 Specify this information:

   Badge ID
   Specify a team badge ID.

   Active
   Select this check box to allow the team to start and stop jobs and to add and remove team members.

   Workset Enabled
   Select this check box to allow the team to work on worksets, which include multiple jobs. Clear to only allow the team to work on one job at a time.

   Remove Member at Clock Out
   Select this check box to remove employees from the team when they clock out.

   Combine Labor and Machine Time
   Select this option to allow employees report machine time automatically as a ratio of labor time on the Workset Maintenance form. Clear this option to report machine time manually.

6 Select **Save** in the top portion of the form above the tabs. The team is created.

Cross Docking Items

For all material inbound transactions like Po receipt, Job material Return, JIT production receipt, Job operation reporting (Final operation), Transfer order receipts, QCS disposition (Move to stock) factory track supports cross docking . As part of this feature based on cross docking parameter configuration, system determines open requirements for the and present a consolidated list to the user so that the user can perform next action instead of just putting it back in inventory. This works like a dynamic cross referencing for item at the time of receipt to location.

1 When prompted to cross dock, specify **Yes**. A list of order lines that are available for cross docking are displayed.
2 Select an order line to which to cross dock, and select the green process button.
3 Specify the quantity to cross dock. This value must be less than or equal to the quantities displayed in the **Quantity** field and **Quantity Available** field.
4 Select the green process button.

Deactivating Teams

When using Shop Floor, use the Team Maintenance form to deactivate teams that you are no longer using. Deactivated teams cannot start or stop jobs or add or remove members. To access the Team Maintenance form, you must be assigned to the **Administrator**, **Supervisor**, or **TeamLeader** permission group. You cannot delete teams in Factory Track. To deactivate teams using the Time Track module in Infor Factory Track, see Deactivating Teams Using Time Track.

1 Open the Team Maintenance form.
2 Specify the team name or team badge ID.
3 If there are any members assigned to the team, select **Remove All**.
4 Clear the **Active** check box.
5 Select **Save**. The team is deactivated.

Defining Kanban Locations

After creating a Kanban item on the Kanban Item form, you must use the Kanban Item Locations form to specify where that Kanban item will be replenished. You can specify multiple replenishment locations for a Kanban item. You must define each Kanban item-location combination as a separate record.

1 Open the Kanban Item Locations form.
2 Click **New** or select a blank line from the grid at the left.
3 Specify this information:

   Item
   Select a Kanban item. The item description, Kanban quantity, and unit of measure are displayed.

   Warehouse
   Select a Kanban warehouse. The warehouse description is displayed.

   Kanban Location
   Select a Kanban location. The location description is displayed as well as the work center containing that location and the work center description.

   Active
   Select this check box to allow this Kanban item-location combination to be replenished. Clear this check box to prevent replenishment requests from being made for this Kanban item-location combination.

4 Click **Save**.

Defining Kanban Replenishment Cycles

The replenishment cycle defines when and how a Kanban will be replenished. You must define a replenishment cycle for each Kanban item-location combination using the Kanban Item Locations form.

1 Open the Kanban Item Locations form.

2 Select a Kanban Item from the grid at the left. The Kanban item and location details are displayed.

3 Specify this information:

Kanban Qty
Optionally, change the Kanban quantity for this Kanban item-location combination. This field is only available if the **Allow Qty Chg** check box is selected on the Kanban Warehouses form for this Kanban item-location combination's warehouse.

Max Number of Kanbans
Specify the total number of Kanbans that can exist for this Kanban item-location combination. When you generate Kanbans for this item-location combination, new Kanbans will be generated to bring the total number up to this value.

Order Trigger Point
Optionally, specify the number of replenishment requests that must be made before a purchase order or transfer order can be generated to replenish Kanbans for this item-location combination. If the replenishment source for this Kanban item-location combination is **Inventory** or **JIT Production**, this field has no effect.

Kanban Source
Specify how this Kanban item-location combination will be replenished:

- **Inventory**
- **JIT Production**
- **Purchase Order**
- **Transfer Order**

JIT Replenishment Location
This field is only available if the replenishment source is **JIT Production**. Select the location where the replenishment items will be produced.

From Site
This field is only available if the replenishment source is **Transfer Order**. Select the site from which items will be transferred.

From Warehouse
This field is only available if the replenishment source is **Transfer Order**. Select the warehouse from which items will be transferred.

Transfer Order
This field is only available if the replenishment source is **Transfer Order**. Optionally, specify an existing transfer order to use for replenishment orders for this Kanban item-location combination.

Vendor
This field is only available if the replenishment source is **Purchase Order**. Select the number of the vendor who will supply the items.

Purchase Order
This field is only available if the Kanban source is **Purchase Order**. Optionally, specify an existing purchase order to use for replenishment orders for this Kanban item-location combination.

4 Optionally, to create Kanbans for this Kanban item-location combination, click **Generate Kanban(s)**. If the maximum number of Kanbans for this item-location combination has not been met, Kanbans are created to bring the total number of Kanbans for this item-location combination up to the maximum. Newly created and existing Kanbans are displayed in the grid in the Kanban section. Each Kanban's replenishment status and the request number for any current replenishment requests are also displayed. To print labels for new Kanbans, see "Printing Kanban Labels" on page 40.

5 Click **Save**.

Deleting Kanban Replenishment Requests

Use the Kanban Replenishment Status form to delete Kanban replenishment requests. You can only delete replenishment requests that have the status of **Requested**.

1 Open the Kanban Replenishment Status form.

2 To define replenishment request search criteria, specify some or all of this information:

Item
Specify a starting and ending item number.

Warehouse
Specify a starting and ending Kanban warehouse.

Work Center Location
Specify a starting and ending work center location.

Kanban Location
Specify a starting and ending Kanban location.

Kanban
Specify a starting and ending Kanban number.

3 To display replenishment requests matching the specified search criteria, select the **Refresh** button. The replenishment requests are displayed in the grid. This information is displayed for each request:

- item
- warehouse
- work center location
- Kanban location
- Kanban
- request number
- request status
- replenishment quantity
- request date
- replenishment source
- order number
- order line

- any order errors

4 To delete a replenishment request, select it, and then select **Delete**. You can only delete replenishment requests that have the status of **Requested**.

Deleting Records of Scrapped Items

1 Open the Job Move, End Machine, End Run, End Run Only, End Team Run, or Team Member Reporting form.
2 Specify a job and job suffix.
3 Select the operation number for which you are scrapping items.
4 In the grid on the **Scrap** tab, select the record you are deleting.
5 Select the **Delete** button.

Generating Kanban Replenishment Orders

Use the Generate Kanban Replenishment Orders form to create purchase and transfer orders to fill Kanban replenishment requests.

1 Open the Generate Kanban Replenishment Orders form.
2 Select a replenishment source.
3 To select replenishment requests for which to generate orders, define filter criteria. Optionally, leave the filter criteria blank to select all requests. Replenishment orders will be generated for all replenishment requests that:
   - use the selected replenishment source
   - match the filter criteria
   - have sufficient requests to meet the order trigger point defined for the Kanban item
4 To define filter criteria, specify some or all of this information:

   Item
   Specify a starting and ending Kanban item number.

   Warehouse
   Specify a starting and ending Kanban warehouse.

   Work Center Location
   Specify a starting and ending work center location.

   Kanban Location
   Specify a starting and ending Kanban location.

5 To generate replenishment orders, select the green process button. To close the form without generating replenishment orders, select the **Close** button.

Identifying Missing Employee Information for Time Track Implementation

Because the Time Track module in Infor Factory Track requires additional employee information that is not required for the Shop Floor module, you may need to add employee information on the Employees form when implementing Time Track. You can use the Missing Employee Information Required by Time Track Report form to generate a report that identifies what information is missing.

1. Open the Missing Employee Information Required by Time Track Report form.
2. Specify starting and ending employee IDs for which to identify missing information. Optionally, leave the **Employee** fields blank to identify missing information for all employees.
3. Optionally, select **Display Report Header** to display in the header what employee IDs are included in the report.
4. Optionally, to preview the report, select **Preview**.
5. To print the report, select **Print** .

To close the form, select the **Close** button.

Issuing Material to Jobs

Use the Job Material Issue form to issue material to jobs.

1. Open the Job Material Issue form.

   The Employee number and Employee name are displayed on the form.
2. Specify or review this information:

   Job
   Specify a job number.

   Note: If the job number is not specified, the application displays this message: `There is not one Job Operation where Complete exists for the Job that has [Job: (Blank)].`

   Suffix
   Specify a job suffix.

   Operation
   Specify an operation number.

   Material
   Specify the material you are issuing.

   Warehouse
   Select a warehouse from which to issue the material.

   Location
   Select a staging location from which to issue the material.

   Issue Qty
   Specify the quantity of material to issue.

   Issue By-Product
   To issue material as a by-product, select this check box.

Import Document Number
Scan the import document number. This field is only displayed if the **Track Tax-Free Imported Materials** parameter is selected on the Inventory Parameters form and the **Tax-Free Imported Material** check box is selected for the item you are issuing.

To Container
Select this check box to issue the completed items to a container. This check box is only displayed if you do not have the Time Track module implemented and this is the last operation.

Container
Scan a container to which to issue the completed items. Optionally, leave blank to generate a new container number. This field is only displayed if the **To Container** check box is selected.

3 Information about the specified job, operation, and material are displayed on the **Details** tab.

- If applicable, select a lot number on the **Lot/Serial** tab.
- If applicable, specify the lot number in the **Confirm Lot** field.
- If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the material you are issuing, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to issue the material.
- If applicable, specify this information on the **Lot/Serial** tab:

Job Lot
Specify a job lot number to which to assign the material. You can select from a list of pre-assigned lot numbers for the job. The job lot number tracks the items that will be assembled from the material.

Job Serial
Specify a job serial number to which to assign the material. You can select from a list of pre-assigned serial numbers for the job. The job serial number tracks the item that will be assembled from the material.

4 To issue the material, select the **process** button. If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form. To close the form without issuing material, select the **Close** button.

5 If the **Allow Cross-Docking** parameter is selected for this transaction, this order is not cross-referenced to another order, and there are open cross docking requirements, you asked whether to cross dock. For instructions on cross docking, see Cross Docking Items.

Issuing Material to Service Orders

Use the SRO Material form to issue material to service orders.

1 Open the SRO Material form.

2 Specify or review this information:

Partner ID
Specify a partner number.

SRO
Specify a service order to which to issue material.

Line
Select an order line.

Operation
Select an operation.

Item
Scan the item number of the material you are issuing.

Customer Item
If applicable, the customer item number is displayed.

Warehouse
Specify the warehouse from which to issue the item.

Location
Select a location from which to issue the material. A location is recommended by default.

Qty
Specify a quantity to issue.

UOM
The unit of measure is displayed.

Bill Code
If applicable, specify a bill code. This field is only available if the **Allow Bill Code Entry** parameter is selected for this transaction.

Unit Price
If applicable, specify a unit price. This field is only available if the **Allow Unit Price Entry** parameter is selected for this transaction.

3. If applicable, select a lot number on the **Lot/Serial** tab.
4. If applicable, specify the lot number in the **Confirm Lot** field.
5. If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the material you are issuing, select the arrow button. See Assigning Serial Numbers for details. You must assign all unassigned serial numbers to issue the material.
6. Select **Issue Material**.

Issuing Material to Work Centers

Use the Work Center Material Issue form to issue material to work centers.

1. Open the Work Center Material Issue form.

2 Specify the work center to which you are issuing material. Information about the work center is displayed on the **Details** tab.

3 Specify or review this information:

Material
Specify the material to issue. Information about the material is displayed on the **Details** tab.

Warehouse
Select a warehouse from which to issue the material.

Location
Select a staging location from which to issue the material.

Issue Qty
Specify the quantity of material to issue.

Note: If the**Issue Qty** is not specified or entered as zero, the application displays this message: `Issue Qty must be greater than 0`.

Import Document Number
Scan the import document number. This field is only displayed if the **Track Tax-Free Imported Materials** parameter is selected on the Inventory Parameters form and the **Tax-Free Imported Material** check box is selected for the item you are issuing.

4 If applicable, select a lot number on the **Lot/Serial** tab.

5 If applicable, specify the lot number in the **Confirm Lot** field.

6 If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the material you are issuing, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to issue the material.

7 If applicable, specify this information on the **Lot/Serial** tab:

Job Lot
Specify a job lot number to which to assign the material. You can select from a list of pre-assigned lot numbers for the job. The job lot number tracks the items that will be assembled from the material.

Job Serial
Specify a job serial number to which to assign the material. You can select from a list of pre-assigned serial numbers for the job. The job serial number tracks the item that will be assembled from the material.

8 To issue the material, select the green process button. If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form. To close the form without issuing material, select the **Close** button.

Joining Teams

When using Shop Floor, use the Join / Leave Team form to join teams that are currently working on jobs. You can only be a member of one team. If you are trying to switch from one team to another, you must first leave your current team.

1 Open the Join / Leave Team form.

Note:

- If the Join Leave Team form is started from the Home page, the form populates the **team** and **badge** fields for the required employee. The form must also populate the **Employee Badge ID** field.
- If the employee clicks **Submit** button with no employee badge id, the application displays this message `Please enter the Employee`.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

3 Specify the team name or team badge ID. The job operations on which the team is currently working are displayed on the **Progress** tab.

4 Specify your employee badge ID. If you are not already a member of the selected team, the **Join** option is selected.

5 To join the selected team, select the green process button. If the selected team is currently working a job, you are assigned to it. To close the form without joining any teams, select the **Close** button.

Leaving Teams

When using Shop Floor, use the Join / Leave Team form to leave teams.

1 Open the Join / Leave Team form.

Note:

- If the Join Leave Team form is started from the Home page, the form populates the **team** and **badge** fields for the required employee. The form must also populate the **Employee Badge ID** field.
- If the employee clicks **Submit** button with no employee badge id, the application displays this message `Please enter the Employee`.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

3 Specify the team name or team badge ID. The job operations on which the team is currently working are displayed on the **Progress** tab.

4 Specify your employee badge ID. If you are a member of the selected team, the **Leave** option is selected.

5 To leave the selected team, select the green process button. You are unassigned from any team jobs that you are working. To close the form without leaving the team, select the **Close** button.

Managing Kanban Items

Use the Kanban Items form to manage Kanban items. You can designate items in your ERP system as Kanban items and define a replenishment quantity and replenishment source.

1 Open the Kanban Items form.

2 If you are creating a new Kanban item, click **New**. If you are modifying an existing Kanban item, select it from the grid.

3 Specify or review this information:

Kanban Qty
Specify the quantity of items that will be used as the default replenishment quantity for Kanbans created for this Kanban item.

Replenishment Source
Specify the source for replenishing the Kanban:

- **Inventory**
- **JIT Production**
- **Purchase Order**
- **Transfer Order**

UOM
The unit of measure is displayed.

Active
Select this check box to allow this Kanban to be replenished. Clear this check box to prevent replenishment requests from being made for this Kanban.

4 Click **Save**.

Managing Kanban Locations

Use the Kanban Locations form to manage locations at which kanban items are used. You can create Kanban locations within a location defined in your ERP system.

1 Open the Kanban Locations form.

2 If you are creating a new Kanban location, click **New**. If you are modify an existing Kanban location, select it from the grid.

3 Specify this information:

Location
Specify a name and description for the location.

Work Center Location
Select a location in your ERP system that will contain the Kanban location. All work centers in your ERP system are available in the drop-down menu.

4 Click **Save**.

Managing Kanban Warehouses

Use the Kanban Warehouses form to manage Kanban warehouses. You can designate warehouses in your ERP system to be used for Kanban items and define a staging location for Kanban replenishment items.

1. Open the Kanban Warehouses form.
2. If you are designating a new warehouse to use for Kanban items, click **New**. If you are modify an existing Kanban warehouse, select it from the grid.
3. Specify this information:

   Warehouse
   Select a warehouse. All warehouses in your ERP system are available in the drop-down menu.

   Staging Location
   Specify a location where Kanban replenishment items from inventory will be staged before being moved to the Kanban location.

   Allow Qty Chg
   Select this check box to allow users to change the replenishment quantity from the default quantity for a Kanban using the Kanban Item Locations form.

   Active
   Select this check box to use this warehouse for Kanban replenishment requests. Clear this check box to prevent replenishment requests from being made for Kanban items located in this warehouse.

4. Click **Save**.

Managing Resource Group Skills Requirements

Use the Resource Group Skills Management form to define skills requirements for labor type resource groups. If a job operation references a resource group, only employees who meet the defined skills requirements for that resource group will be able to work on that job operation.

1. Open the Resource Group Skills Management form.
2. Select a resource group.
3. To add skills to the requirements for this resource group, specify this information:

   Skil
   Select a skill.

   Effective
   Select an effective date for the skill requirements.

   Expiration
   Optionally, select a date at which the skill requirements will expire. Leave blank to keep this skill requirements in place indefinitely.

4. To add the skill requirement to the resource group, select the add button.

5 To remove skills from the requirements for this resource group, select a skill from the grid and select the remove button.
6 To save your changes to the skill requirements for this resource group, select the green process button.

Managing Worksets Using the Work Center Form

Only workset-enabled employees can manage worksets.

To manage your workset:

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. If your workset is running, the operations, tasks, and activities in that workset are displayed on the **Active Transactions** tab.
4. Select **Maintain**. The Workset Maintenance form is opened. Use this form to manage your workset. See "Managing Worksets" on page 12 for more information.

Moving Items to the Next Operation

Use the Job Move form to move completed items from one operation to the next or from the last operation into inventory. You can also report items as completed on this form. You can perform these activities for standard, single-item jobs or for co-product jobs, which produce a mixed group of items.

1. Open the Job Move form.
2. Specify a job and job suffix. The item number and job status as well as the total, scrapped, completed, and remaining quantities are displayed on the **Details** tab. To view the current progress of each operation in the selected job, select the **Progress** tab.
3. Select the operation number from which the items are being moved. The work center where the operation was performed is displayed on the **Details** tab.
4. Specify or review this information:

   Location
   If applicable, specify the stock location where the completed item is to be received. This field is only available if the last operation of the job is selected and if the **Put Away** parameter is selected for this transaction.

   Combine Labor and Machine Time
   Select this check box to report machine time as a ratio of labor time for this operation. Clear this check box to report machine time manually in a separate transaction. This check box is only available if the Time Track module in Infor Factory Track is implemented and if the **Combine Labor and Machine Time** check box is selected for your employee type on the Employee Types form.

   Good
   Specify the number of completed items for the selected operation. If you are working on a co-product job, this field is unavailable.

Moved
Specify the number of completed items to move to the next operation. If you are working on a co-product job, this field is unavailable.

Complete Operation
If you are completing the operation, select this check box. If backflushing is required, you cannot select this check box until you have issued all backflush material. This check box is only available if **Allow Operation Complete** is selected for this transaction.

Close Job
If you are completing the operation and it is the last operation on the job, select this check box. If backflushing is required, you cannot select this check box until you have issued all backflush material. This check box is only available if **Allow Job Close** is selected for this transaction.

Reverse Quantity
To move items to the next operation, clear this check box.

Whse
Specify the warehouse to which to issue the completed material. This field is only displayed if this is the last operation and you are not working on a co-product job.

Location
Specify the location to which to issue the completed material. This field is only displayed if this is the last operation.

To Container
Select this check box to issue the completed items to a container. This check box is only displayed if this is the last operation.

Container
Scan a container to which to issue the completed items. Optionally, leave blank to generate a new container number. This field is only displayed if the **To Container** check box is selected.

Issue to Parent
Select **Yes** to issue completed items from this sub-assembly job to its parent job. This field is only displayed if:

- the **Prompt for issue to Parent Job** parameter is selected for this transaction.
- a parent job is defined as the destination for the completed items.
- this is the last operation for this sub-assembly job.

5 If the current job is a co-product job, select the **Co-Products** tab and specify this information for each co-product listed on the tab:

Completed Qty
Specify the number of completed items for the selected operation.

Moved Qty
Optionally, specify the number of completed items on this job to move to the next operation. When you select **Save**, this value will be updated by the quantity specified in **Moved Edit** field.

Scrapped Qty
Optionally, specify the quantity of items on this job to scrap. When you select **Save**, this value will be updated by the quantity specified in **Scrapped Edit** field.

Reason Code
If applicable, specify a reason code for any scrapped items.

Lot
If applicable, scan the lot number.

Next Op
Optionally, specify the next operation for all co-products on this job.

Moved Edit
Specify the moved quantity for this co-product.

Scrapped Edit
Specify the scrapped quantity for this co-product.

6. Select **Save**.
7. If applicable, use the **Scrap** tab to scrap items. See Scrapping Items for details. The number of items that will be scrapped when the operation is stopped are displayed in the **Scrapped** field. This tab is only available if **Allow Scrap** is selected for this transaction and the current job is not a co-product job.
8. If applicable, specify the lot number on the **Lot/Serial** tab. If backflushing is required or you are working on a co-product job, this tab is unavailable.
9. If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to move the items to the next operation. If backflushing is required or you are working on a co-product job, this tab is unavailable.
10. If applicable, select **Backflush Lots** to backflush material for other operations. See "Backflushing Lot Material for Job Operations" on page 18 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
11. If applicable, select **Backflush Serials** to backflush serialized material for other operations. See "Backflushing Serialized Material for Job Operations" on page 19 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
12. To report completed items and to move the specified quantity of completed items to the next operation, select the green process button.

    If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

    If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form.

    If the **Allow Cross-Docking** parameter is selected for this transaction, this order is not cross-referenced to another order, and there are open cross docking requirements, you asked whether to cross dock. For instructions on cross docking, see "Cross Docking Items" on page 23.

Moving Kanban Items to Staging Locations

Use the Kanban Staging form to move items from inventory to Kanban staging locations. To print a pick list, see "Printing Kanban Pick Lists" on page 40.

1 Open the Kanban Staging form.
2 Select a Kanban. All Kanbans that are replenished from inventory and have a replenishment request status of **Requested** or **Ordered** are available in the drop-down menu. This information about the selected Kanban is displayed in the Details section:
   - Item number
   - Item description
   - Warehouse containing the Kanban
   - Staging location to which replenishment items from inventory will be moved
   - Quantity requested
   - Quantity previously picked for the current replenishment request
   - Quantity you are currently picking for the current replenishment request
   - Quantity remaining to be picked for the current replenishment request
3 In the **Quantity Picked** field in the grid, specify the quantity to move from each location. The **Currently Picked** and **Remaining to Pick** fields are updated.
4 To move the specified quantities to the Kanban staging location, select the green process button. To close the form without moving any quantities, select the **Close** button.

Performing Inventory Disposition for Inspected Items

Use the QCS Disposition form to perform inventory disposition at an inspection location. As part of this transaction, you can transfer items to standard inventory locations, hold items at the inspection location, and destroy items.

1 Open the QCS Disposition form.
2 Specify this information:

   Rcvr
   Specify a receiver. You can use a customer, supplier, or WIP tag as a receiver.

   Ord Type
   Select an order type.

   Note: The default value of the field is set to **Supplier**.

   Inspector
   Specify an inspector.

   Accept Documentation
   Select this check box if there is inspection documentation for the receiver.

3 On the **Accepted** tab, specify this information:

   Qty
   Specify a quantity to accept.

Reason
Select a reason code for the accepted quantity. This field is only displayed if you accepted a quantity greater than zero.

Disp Code
Specify a new disposition for the accepted quantity. This field is only displayed if you accepted a quantity greater than zero.

To Location
If applicable, specify an inventory location to which to move the items. This field is only displayed if you are moving items to inventory.

Issue Reason Code
If applicable, specify an issue reason code. This field is only displayed if you are destroying items.

Document
If applicable, specify a document number. This field is only displayed if you are destroying items or moving items to inventory.

Un-Assigned
The number of unassigned serial numbers is displayed. If applicable, select the arrow button on this field to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to complete the transaction.

4 On the **Rejected** tab, specify this information:

Qty
Specify a quantity to reject.

Reason
Select a reason code for the rejected quantity. This field is only displayed if you rejected a quantity greater than zero.

Disp Code
Specify a new disposition for the rejected quantity. This field is only displayed if you rejected a quantity greater than zero.

Issue Reason Code
If applicable, specify an issue reason code. This field is only displayed if you are destroying items.

Document
If applicable, specify a document number. This field is only displayed if you are destroying items.

Cause
Specify a cause for the rejection. This field is only displayed if you rejected a quantity greater than zero.

Un-Assigned
The number of unassigned serial numbers is displayed. If applicable, select the arrow button on this field to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to complete the transaction.

5 On the **Qc Hold** tab, specify or review this information:

Qty
Specify a quantity to hold at the inspection location.

Reason
Select a reason code for the held quantity. This field is only displayed if you held a quantity greater than zero.

New MRR
Specify whether to generate a new MRR number. This field is only displayed if you held a quantity greater than zero.

To Location
The holding location is displayed. This field is only displayed if you held a quantity greater than zero.

Document
If applicable, specify a document number. This field is only displayed if you held a quantity greater than zero.

Un-Assigned
The number of unassigned serial numbers is displayed. If applicable, select the arrow button on this field to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to complete the transaction.

6. To report the new inventory dispositions, select the green process button. To close the form reporting any new inventory dispositions, select the **Close** button.
7. If the **Print Labels** parameter is selected on the Transaction Settings form, labels are automatically printed or the Label Printing form is opened. See Printing Labels for information about printing labels using the Label Printing form.

Printing Kanban Labels

Use the Kanban Label Printing form to print Kanban labels.

1. Open the Kanban Label Printing form.
2. Specify this information:

   Kanban
   Select a starting and ending Kanban number. Labels will be printed for both Kanban numbers and all Kanbans in between.

   Printer
   Select a printer.

   Number of Labels
   Specify the number of labels to print for each Kanban.

3. To print labels, select the green process button. To close the form without printing labels, select the **Close** button.

Printing Kanban Pick Lists

Use the Kanban Pick List form to print pick lists for Kanban replenishment requests.

1 Open the Kanban Pick List form.

2 Specify this information:

Pick From Warehouse
To specify which warehouse items should be picked from, select a warehouse. Leave blank to allow items to be picked from any warehouse.

Display Report Header
Select this check box to print a report header, which includes the filter criteria used to generate the list, on the pick list.

Print Bar Codes
Select this check box to print bar codes for the Kanban items, pick locations, and units of measure on the pick list.

3 To determine which replenishment requests to include in the pick list, define filter criteria. Optionally, leave the filter criteria blank to include all requests. To define filter criteria, specify some or all of this information:

Warehouse
Specify a starting and ending Kanban warehouse.

Work Center Location
Specify a starting and ending work center location.

Kanban Location
Specify a starting and ending Kanban location.

Item
Specify a starting and ending Kanban item number.

Kanban
Specify a starting and ending Kanban number.

4 Optionally, to preview the pick list, select **Preview**.

5 To print the pick list, select **Print**. The pick list includes information about each Kanban and replenishment request included in the list. This information is also displayed for each potential pick location:

- warehouse
- location
- quantity available
- blank space for picker to record picked quantity
- unit of measure

6 To close the form without printing the pick list, select the **Close** button.

Printing Labels

Use the Label Printing form to print barcode labels for items being moved to inventory. The Print Labels transaction parameter must be selected to open the Label Printing form. The Label Printing form opens when you perform a transaction using a form that supports label printing.

1. On the parent form, select the green process button to complete the transaction and open the Label Printing form. The Label Printing form will only open if items are being moved to inventory by the transaction.

   Note: If the **Print Quiet Mode** parameter is selected for the parent transaction, labels will automatically print without opening the Printing Labels form.

2. Specify or review this information:

   Printer
   Select a printer. This field is only available for your first label quantity entry. The initial value is saved for additional label quantity entries.

   Label Per Box
   Specify the number of labels to print for each box. This field is only available for your first label quantity entry. The initial value is saved for additional label quantity entries.

   Qty Remaining
   The number of remaining labels to be printed is displayed.

   Number of Boxes
   Specify the number of boxes for which to print labels.

   Qty Per Box
   Specify how many items are in each box.

   Number of Labels
   The number of labels you are printing is displayed. This value equals the number of boxes multiplied by the number of labels per box.

3. To save the current label quantity for printing and to specify additional label quantities, select **Next**. Saved label quantities are displayed in the grid. You can clear all saved label quantities by selecting **Clear**. To specify additional label quantities, return to step 2. When you specify additional label quantities, the **Printer** and **Label Per Box** fields are read only.
4. When the quantity of remaining labels to print is zero, select the green process button to print the labels.
5. To close the form, select the **Close** button.

Printing Lists of Staged Kanban Items

Use the Kanban Staged Items Report form to print a list of staged items for Kanban replenishment. You can use this list to assess which items are ready to be received at Kanban locations.

To print a list of staged items for Kanban replenishment:

1 Open the Kanban Staged Items Report form.
2 Specify this information:

Warehouse
Select a warehouse for which to generate the list.

Print Bar Codes
Select this check box to print bar codes for Kanban numbers on the list.

Display Report Header
Select this check box to print a report header, which includes the warehouse, on the list.

3 Optionally, to preview the list, select **Preview**.
4 To print the list, select **Print**. All Kanban items in the selected warehouse that are associated with a replenishment request that has a status of **Staged** are included in the list. This information is displayed for each replenishment request included in the list:

- Kanban item number
- replenishment request status
- requested replenishment quantity
- staged quantity
- received quantity
- available quantity
- unit of measure
- work center location
- Kanban location
- replenishment request number
- Kanban number

5 To close the form without printing the list, select the **Close** button.

Re-printing Labels

Use the Label Reprint form to re-print barcode labels for items.

1 Open the Label Reprint form.
2 To define label search criteria, specify some or all of this information:

Transaction Name
Select the transaction for which the label was originally printed.

User ID
Specify the user ID of the person who originally printed the label.

Request ID
To search for a label by its request ID, specify a starting and ending request ID. A request ID is recorded for each label that is printed.

Print Date/Time
To search for a label by the date and time it was printed, specify a starting and ending date and time.

3 Select **Refresh**. The labels that meet the search criteria specified above are listed in the grid. This information is displayed for each label:

- request ID
- name of the transaction for which the label was printed
- label name
- number of copies printed
- printer name
- reference request ID, which is the original reference ID if the label is a reprint
- user ID of the person who originally printed the label
- filename
- date created

4 Optionally, to view additional details for previously printed labels, select **Print Details**.
5 In the grid, select the labels to reprint.
6 Select **Reprint**.

Recalling Material from Service Orders

Use the SRO Material form to recall material from service orders.

1 Open the SRO Material form.
2 Specify or review this information:

Partner ID
Specify a partner number.

SRO
Select a service order to which to recall material.

Line
Select an order line.

Operation
Select an operation.

Item
Scan the item number of the material you are recalling.

Customer Item
If applicable, the customer item number is displayed.

Warehouse
Specify a warehouse to which to recall the item.

Location
Select a location to which to recall the material.

Qty
Specify a quantity to recall.

UOM
The unit of measure is displayed.

Bill Code
If applicable, specify a bill code. This field is only available if the **Allow Bill Code Entry** parameter is selected for this transaction.

Unit Price
If applicable, specify a unit price. This field is only available if the **Allow Unit Price Entry** parameter is selected for this transaction.

3. If applicable, select a lot number on the **Lot/Serial** tab.
4. If applicable, specify the lot number in the **Confirm Lot** field.
5. If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the material you are issuing, select the arrow button. See Assigning Serial Numbers for details. You must assign all unassigned serial numbers to issue the material.
6. Select **UnIssue Material**.

Receiving Items from Jobs

Use the Job Receipt form to receive completed items from jobs into inventory.

1. Open the Job Receipt form.
2. Specify or review this information:

Job
Specify a job number.

Suffix
Specify a job suffix. The required, scrapped, completed, and remaining quantities are displayed.

Warehouse
Select a warehouse into which to receive the items.

Location
Select a location at which to receive the items.

Qty to Receive
Specify the quantity of items to receive.

Note: If the **Qty to Receive** is set to zero, the application displays this message: `Qty To Receive must be greater than 0`.

3 The item you are receiving and your shift as well as the total, scrapped, completed, and remaining quantities are displayed on the **Details** tab.

- If applicable, the lot number is displayed on the **Lot/Serial** tab. If backflushing is required, this tab is unavailable.
- If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the items you are receiving, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to receive the items. If backflushing is required, this tab is unavailable.
- If applicable, select **Backflush Lots** to backflush material for other operations. See "Backflushing Lot Material for Job Operations" on page 18 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
- If applicable, select **Backflush Serials** to backflush serialized material for other operations. See "Backflushing Serialized Material for Job Operations" on page 19 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.

4 To receive the items, select the green process button.

If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form.

Receiving Items from Production Schedules

Use the Production Schedule Receipt form to receive completed items from production schedules into inventory.

1 Open the Production Schedule Receipt form.

2 Specify or review this information:

Item
Specify the item you are receiving.

Schedule
Select a production schedule.

Work Center
Select a work center of the production schedule.

Operation
Select an operation of the production schedule.

Location
Select a location at which to receive the items. This field is only displayed if the **Put Away** parameter is selected for this transaction.

Shift
Select your shift.

Reverse Quantity
To receive items, clear this check box.

Qty To Receive
Specify the quantity of items to receive.

Scrapped Qty
Optionally, specify the quantity of items to scrap. Positive quantities will increase the scrapped item count of the product schedule, while negative quantities will decrease it.

Scrapped Reason
If applicable, select a reason code for scrapped items.

To Container
Select this check box to receive the completed items into a container. This check box is only displayed if you do not have the Time Track module implemented and this is the last operation.

Container
Scan a container into which to receive the completed items. Optionally, leave blank to generate a new container number. This field is only displayed if the **To Container** check box is selected.

3 The item description, work center description, warehouse, and location are displayed on the Details tab.

- If applicable, specify a lot number on the **Lot/Serial** tab. The lot number might be specified by default.
- If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the items you are receiving, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to receive the items.
- To receive the items, select the green process button. If the **Print Labels** parameter is selected for this transaction, the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels.

Note: If the **Allow Cross-Docking** parameter is selected for this transaction, this order is not cross-referenced to another order, and there are open cross docking requirements, you asked whether to cross dock. For instructions on cross docking, see "Cross Docking Items" on page 23.

Receiving Just-In-Time Production Items

Use the Just-In-Time Production form to receive completed items into inventory that are not associated with a job or production schedule.

1 Open the Just-In-Time Production form.

2 Specify or review this information:

Item
Specify the item you are receiving. The item description is displayed on the **Details** tab.

Warehouse
Select a warehouse into which to receive the items.

Location
Select a location at which to receive the items.

Shift
Your shift is displayed.

Reverse Quantity
To receive production items, clear this check box.

Qty To Receive
Specify the quantity of items to receive.

To Container
Select this check box to issue the completed items to a container. This check box is only displayed if you do not have the Time Track module implemented and this is the last operation.

Container
Scan a container to which to issue the completed items. Optionally, leave blank to generate a new container number. This field is only displayed if the To Container check box is selected.

Note: If the container number is not specified, the application displays this message: `Please enter a valid container`.

3. If applicable, specify a lot number on the **Lot/Serial** tab. The lot number might be specified by default.
4. If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the items you are receiving, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to receive the items.
5. To receive the items, select the green process button. To close the form without receiving items, select the **Close** button.
6. If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.
7. If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form.
8. If the **Allow Cross-Docking** parameter is selected for this transaction, this order is not cross-referenced to another order, and there are open cross docking requirements, you asked whether to cross dock. For instructions on cross docking, see "Cross Docking Items" on page 23.

Receiving Kanban Replenishment Items

Use the Kanban Receipt form to receive Kanban replenishment items from staging locations into Kanban replenishment locations. To print a list of staged items for Kanban replenishment, see "Printing Lists of Staged Kanban Items" on page 42.

1 Open the Kanban Receipt form.
2 Select a Kanban. All Kanbans that have an open replenishment request and have replenishment items available in the staging location are available in the drop-down menu. This information about the selected Kanban is displayed:
3 If applicable, confirm the Kanban location.
4 In the **Receipt Quantity** field, specify the quantity you are receiving.
5 To receive the specified quantity of replenishment items, select the green process button. If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Printing Labels form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form. To close the form without receiving any quantities, select the **Close** button.

Recording Test Results

Use the QCS Test Record form to generate quality tests and to record test results.

1 Open the QCS Test Record form.
2 Specify this information:

   Rcvr
   Specify a receiver. You can use a customer, supplier, or WIP tag as a receiver.

   Ord Type
   Select an order type.

   Lot Size
   Specify a lot size.

   Sample Size
   Specify a sample size.

   Inspector
   Specify an inspector.

   QC Lot
   If applicable, specify a QC lot.

3 To record results for all test at once, select **Batch Test**. To record results for each test individually, select **Each Test**.
4 If you selected **Batch Test**, select a test from the list on the **Batch** tab and select **Select**. Specify this information for the test:

   Minimum
   Specify the minimum test result value.

Maximum
Specify the maximum test result value.

Nominal
Specify the nominal test result value.

Qty Tested
Specify the quantity that was tested.

Qty Failed
Specify the quantity that failed.

Gage
Select a gage.

Pass
Select this check box if the test was passed.

Gage Expire
Select this check box if the gage is expired.

Completed
Select this check box if the test is completed.

5 If you selected **Each Test**, select a test from the list on the **Each** tab and select **Select**. Specify this information for the test:

Actual Value
Specify the test value.

Actual Gage
Specify the gage value.

Pass
Select this check box if the test was passed.

Piece Complete
Select this check box if testing is completed for this piece.

6 To record the test results, select the green process button. To close the form without recording test results, select the **Close** button.

Removing Items from Containers

Use the Empty Container transaction to remove items from containers.

Note: You can only use this form if you do not have the Time Track module implemented.

1 Open the Empty Container form.
2 Specify or review this information:

Container
Scan a container.

Empty All
Select this check box to remove all items from the container. If you select this check box, all other fields are not displayed.

Item
Scan an item to remove from the container. The item description is displayed.

Whse
The warehouse is displayed.

Location
The location of the container is displayed.

Container Qty
The quantity of the selected item in the container is displayed.

Remove Qty
Specify the quantity to remove from the container.

- If applicable, select a lot number on the **Lot/Serial** tab.
- If applicable, specify the lot number in the **Confirm Lot** field.
- If applicable, the quantity of serial numbers that have not been specified are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To specify the serial numbers of the items you are removing from the container, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must specify all unassigned serial numbers to remove the items.
- To remove the items from the container, select the green process button.

Removing Jobs from Worksets

You can remove operations, tasks, activities, projects and service labor from a workset that is not currently running. To stop an operation, task, activity, project or service labor on a running workset, see the Stopping Worksets section below.

1. Open the Workset Maintenance form.
2. In the **Type** field, select **Employee** or **Team**.
3. Specify your team or your badge ID.
4. To view the workset associated with the specified team or badge ID, select **Refresh Workset**. The operations and tasks in the workset are displayed in the grid on the **Workset** tab.
5. On the **Workset** tab, select the operation or task you are removing.
6. Select **Remove**.

Replenishing Kanbans from Inventory

If the replenishment source for the Kanban item is **Inventory**, items will be picked from inventory to replenish Kanbans for that Kanban item.

1 Create a replenishment request. The request status is set to **Requested**. See "Requesting Replenishment for Kanbans" on page 57 or Requesting Replenishment for Kanbans Using a Mobile Scanner Device for more information.
2 Pick items from inventory and move them to the staging location. The request status is set to **Staged**. See "Moving Kanban Items to Staging Locations" on page 37 or Picking Items for Kanbans Using a Mobile Scanner Device for more information.
3 Receive items from the staging location into the Kanban location using the Kanban Receipt form. The request status is set to **Closed**. See "Receiving Kanban Replenishment Items" on page 49 for more information.

Replenishing Kanbans with Just-In-Time Production

If the replenishment source for the Kanban item is **JIT Production**, items will be produced using just-in-time production to replenish Kanbans for that Kanban item.

1 Create a replenishment request. The request status is set to **Requested**. See "Requesting Replenishment for Kanbans" on page 57 or Requesting Replenishment for Kanbans Using a Mobile Scanner Device for more information.
2 Replenish the Kanban at the just-in-time production location. The request status is set to **Staged**. Optionally, you can receive the produced items at the Kanban location as part of the same transaction, which will set the request status to **Closed**. See "Using Just-In-Time Production to FillKanban Replenishment Requests" on page 86 for more information.
3 If you did not receive the produced items at the Kanban location as part of step 2, receive them using the Kanban Receipt form or the Kanban Delivery mobile scanner transaction. The request status is set to **Closed**. See "Receiving Kanban Replenishment Items" on page 49 orDelivering Kanban Replenishment Itemsfor more information.

Replenishing Kanbans with Purchase and Transfer Orders

If the replenishment source for the Kanban item is **Purchase Order** or **Transfer Order**, items will be ordered to replenish Kanbans for that Kanban item.

1 Create a replenishment request. The request status is set to **Requested**. See "Requesting Replenishment for Kanbans" on page 57 or Requesting Replenishment for Kanbans Using a Mobile Scanner Device for more information.
2 Generate a purchase or transfer order to fill the request using the Generate Kanban Replenishment Orders form. The request status is set to **Ordered**. You can only generate an order for the request if there are enough requests for that Kanban item to meet its order trigger point. See "Generating Kanban Replenishment Orders" on page 27 for more information.
3 After the order has been received into inventory, pick the items from inventory and move them to the staging location. The request status is set to **Staged**. See "Moving Kanban Items to Staging Locations" on page 37 or Picking Items for Kanbans Using a Mobile Scanner Device for more information.
4 Receive items from the staging location into the Kanban location using the Kanban Receipt form. The request status is set to **Closed**. See "Receiving Kanban Replenishment Items" on page 49 orDelivering Kanban Replenishment Itemsfor more information.

Removing Team Members

Use the Team Maintenance form to remove team members using Shop Floor. To access the Team Maintenance form, you must be assigned to the **Administrator**, **Supervisor**, or **TeamLeader** permission group. You can only remove members from teams that are not currently working on jobs.

To remove team members using the Time Track module in Infor Factory Track, see Removing Team Members Using Time Track.

1. Open the Team Maintenance form.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. Specify the team name or team badge ID.
4. On the **Members** tab, select an employee from the grid and select **Remove Selected**. Optionally, to remove all employees from the team, select **Remove All**.
5. On the **Members** tab, select **Save**. The employee or employees are removed from the team.

Reporting Completed and Moved Quantities

Use the Quantity Enter form to report completed and moved quantities. You must access this form from the Workset Maintenance form. See Managing Worksets for more information.

You can also report completed and moved quantities using the Work Center form.

See "Reporting Completed and Moved Quantities Using the Work Center Form" on page 55.

1. Open the Quantity Enter form by stopping a job operation on the Workset Maintenance form.
2. On the Quantity Enter form, specify this information:

   Good
   Specify the number of completed items for the selected operation.

   Moved
   Specify the number of completed items to move to the next operation.

   Scrapped
   Specify the quantity of items to scrap.

   Reason Code
   Specify a reason code for the scrapped items.

3. Select **End**.

Reporting Completed and Moved Quantities for a Team

Use the Team Member Reporting form to report completed and moved quantities for a team. The quantities you report will be evenly distributed among all team members.

To report quantities for a team:

1 Open the Team Member Reporting form.

Note:

- If the Team Member Reporting form is accessed from the Home page, the form populates the **team** and **badge ID** fields for the required employee.
- If the Team Member Reporting form is accessed from the Home page, the form populates the **Job** fields for the required job on the team. Team with more than one job are not displayed on the form.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

3 If your user type is **Administrator** or **Supervisor**, specify a team name or team badge ID. If your user type is **User**, your current team is displayed.

4 If your user type is **Administrator** or **Supervisor**, specify an employee badge ID. If your user type is **User**, your employee badge ID is displayed.

5 Specify a job and job suffix. The item number, unit of measure, warehouse, and job status are displayed along with the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Jobs** tab.

6 Select the operation number you are stopping. The work center where the operation will be performed is displayed along with the time the operation started and the elapsed time.

7 Specify or review this information:

Good
Specify the number of completed items for the selected operation.

Moved
Specify the number of completed items to move to the next operation. This value might be specified by default.

Location
If applicable, specify the stock location where the completed items are to be received. This field is only available if the last operation of the job is selected and if the **Put Away** parameter is selected for this transaction.

- If applicable, use the **Details** tab to display operation related data. The tab displays the received quantity of the operation.
- If applicable, use the **Scrap** tab to scrap items. See "Scrapping Items" on page 61 for details. This tab is only available if **Allow Scrap** is selected for this transaction.
- If applicable, specify the lot number on the **Lot/Serial** tab.
- If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to stop the operation.
- To report quantities for the selected operation, select the green process button. All specified completed, moved, and scrapped quantities are reported.

Note: If the employee clicks **submit** button without specifying the **Good** field, the application displays no message and clears the form. **Good**, or **Move**, or **Scrap** fields must be specified to enable the **submit** button.

8 If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

Reporting Completed and Moved Quantities Using the Work Center Form

You can report completed and moved quantities for operations that are running.

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default.
4. To view the operations on which you are currently working, select the **Active Transactions** tab.
5. Select an operation.
6. Select **Job Move**. The Job Move form is opened. Use this form to report completed and moved the task. See"Moving Items to the Next Operation" on page 35 for more information.

Reporting Completed and Moved Quantities to Jobs that Have Not Started

Use this form to report completed and moved quantities for jobs that have not started. Using the End Run Only form allows you to start and stop a job in a single transaction. When you report quantities to a job using this form, a job stop transaction will be recorded at the current time, and a job start transaction will be generated to occur immediately following your most recent transaction. For example, if you clock in at 8:00 and stop job ABC at 9:00, a start job transaction for job ABC will be generated at 8:00. Then, if you stop job XYZ at 11:00, a start job transaction for job XYZ will be generated at 9:00.

The **End Run Only** parameter must be selected for the End Run Only form to be used. The End Run Only form is only available if Infor Time Track is implemented.

To stop jobs that have started, use the End Run form or the Work Center form.

To report completed and moved quantities to job operations that have not started:

1. Open the End Run Only form.
2. Specify a job and job suffix. The item number, unit of measure, warehouse, and job status are displayed along with the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Progress** tab.
3. Select the operation number you are stopping. The work center where the operation will be performed is displayed along with the time the operation started and the elapsed time.
4. Specify or review this information:

   Good
   Specify the number of completed items for the selected operation.

   Moved
   Specify the number of completed items to move to the next operation. This value might be specified by default. If Time Track is implemented and this is the last operation on the order, this field is unavailable.

Complete Operation
If you are completing the operation, select this check box. This check box is only available if **Allow Operation Complete** is selected for this transaction.

Close Job
If you are completing the operation and it is the last operation on the job, select this check box. This check box is only available if Time Track is not implemented and **Allow Job Close** is selected for this transaction.

Combine Labor and Machine Time
Select this check box to report machine time as a ratio of labor time for this operation. Clear this check box to report machine time manually in a separate transaction. If the Time Track module in Infor Factory Track is implemented, this check box is only available if the **Combine Labor and Machine Time** check box is selected for your employee type on the Employee Types form.

Machine Ratio
This field is only displayed if **Combine Labor and Machine Time** is selected and if the Time Track module in Infor Factory Track t is implemented. Specify a machine ratio. The machine ratio determines what portion of the reported labor time will be reported for the machine. For example, a ratio of **.5** will report half the reported labor time for the machine. If the Time Track module is not implemented and the **Combine Labor and Machine Time** check box is selected, this field is unavailable and machine time will be reported as a one-to-one ratio to labor time.

Location
If applicable, specify the stock location where the completed item is to be received. This field is only available if:

- the last operation of the job is selected
- the **Put Away** parameter is selected for this transaction
- and Time Track is not implemented

- If applicable, use the **Scrap** tab to scrap items. See "Scrapping Items" on page 61 for details.
- If applicable, specify the lot number on the **Lot/Serial** tab. If Time Track is implemented, the **Lot/Serial** tab is unavailable.
- If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to report completed quantities. If Time Track is implemented, the **Lot/Serial** tab is unavailable.
- To report quantities, select the green process button. To close the form without reporting any quantities, select the **Close** button.

Reporting Labor Hours for a Project

Use the Start Project Labor and End Project Labor forms to report labor hours for a project. You must start and stop reporting labor hours using separate forms.

See "Starting Labor Hours Reporting for a Project" on page 67.

See "Stopping Labor Hours Reporting for a Project" on page 80.

Reporting Labor Hours for a Service Order

Use the Start Service Labor and Stop Service Labor forms to report labor hours for a service order. You must start and stop reporting labor hours using separate forms.

See "Starting Labor Hours Reporting for a Service Order" on page 68.

See "Stopping Labor Hours Reporting for a Service Order" on page 81.

Requesting Replenishment for Kanbans

Use the Kanban Replenishment Requests form to request replenishment for Kanbans.

To request replenishment for a Kanban:

1. Open the Kanban Replenishment Requests form.
2. Select a Kanban. The Kanban item and location details are displayed.
3. Optionally, in the **Quantity** field, change the replenishment quantity. This field is only available if the **Allow Qty Chg** check box is selected on the Kanban Warehouses form for this Kanban's warehouse.
4. To request replenishment, select the green process button. A replenishment request is created for the selected Kanban. To close the form without requesting replenishment, select the **Close** button.

Returning Items to Production Schedules

Use the Production Schedule Receipt form to return previously completed items to production schedules.

To return items to a production schedule:

1. Open the Production Schedule Receipt form.
2. Specify or review this information:

Item

Specify the item you are returning.

Schedule

Select a production schedule.

Work Center

Select a work center of the production schedule.

Operation

Select an operation of the production schedule.

Location

If applicable, select a location from which to return the items. This field is only displayed if the **Put Away** parameter is selected for this transaction.

Shift

Select your shift.

Reverse Quantity

To return items, clear this check box.

Qty To Receive

Specify the quantity of items to return.

Scrapped Qty

Optionally, specify the quantity of items to scrap. Positive quantities will increase the scrapped item count of the product schedule, while negative quantities will decrease it.

Scrapped Reason

If applicable, select a reason code for scrapped items.

The item description, work center description, warehouse, and location are displayed on the **Details** tab.

- If applicable, specify a lot number on the **Lot/Serial** tab. The lot number might be specified by default.
- If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the items you are receiving, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to return the items.
- To return the items, select the green process button. If the **Print Labels** parameter is selected for this transaction the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels.

Returning Just-In-Time Production Items

Use the Just-In-Time Production form to return previously completed just-in-time production items.

To return just-in-time production items:

1 Open the Just-In-Time Production form.

2 Specify or review this information:

Item

Specify the item you are returning. The item description is displayed on the **Details** tab.

Warehouse

Select a warehouse from which to receive the items.

Location

Select a location at which to receive the items.

Shift

Your shift is displayed.

Reverse Quantity

To return production items, select this check box.

Qty To Receive

Specify the quantity of items to return.

- If applicable, specify a lot number on the **Lot/Serial** tab. The lot number might be specified by default.
- If applicable, the quantity of serial numbers that have not been assigned are displayed in the **Un-Assigned** field on the **Lot/Serial** tab. To assign serial numbers to the items you are receiving, select the arrow button. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to return the items.
- To return the items, select the green process button.

If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form.

Returning Material

Use the Job Material Return form to return materials from a job operation back into inventory.

To return materials:

1. Open the Job Material Return form.
2. Specify or review this information:

   Job
   Specify a job number.

   Suffix
   Specify a job suffix.

   Operation
   Specify an operation number.

   Material
   Select the material you are returning. The required, remaining, and available quantities are displayed.

   Warehouse
   Select a warehouse to which to return material.

   Location
   Select a stock location to which to return material.

   Return Qty
   Specify the quantity of material to return to inventory.

3. Information about the selected job, operation, and material is displayed on the **Details** tab.

- If applicable, select a lot number on the **Lot/Serial** tab.
- If applicable, specify the lot number in the **Confirm Lot** field.
- If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details.
- If applicable, specify this information on the **Lot/Serial** tab:

Job Lot
Specify a job lot number to which to assign the material. You can select from a list of pre-assigned lot numbers for the job. The job lot number tracks the items that will be assembled from the material.

Job Serial
Specify a job serial number to which to assign the material. You can select from a list of pre-assigned serial numbers for the job. The job serial number tracks the item that will be assembled from the material.

4 To return the material, select the green process button. If the **Print Labels** parameter is selected for this transaction, the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels. To close the form without returning material, select the **Close** button.

Returning Completed or Moved Items

Use the Job Move form to return items that have previously been moved to the next operation.

1 Open the Job Move form.

2 Specify a job and job suffix. The item number and job status as well as the total, scrapped, completed, and remaining quantities are displayed on the **Details** tab. To view the current progress of each operation in the selected job, select the **Progress** tab.

3 Select the operation number to which the items are being moved. The work center where the operation was performed is displayed on the **Details** tab.

4 Specify or review this information:

Combine Labor and Machine Time
Select this check box to report machine time as a ratio of labor time for this operation. Clear this check box to report machine time manually in a separate transaction. This check box is only available if the Time Track module in Infor Factory Track is implemented and if the **Combine Labor and Machine Time** check box is selected for your employee type on the Employee Types form.

Good
Specify the number of completed items for the selected operation. If you are working on a co-product job, this field is unavailable.

Moved
Specify the number of completed items to move from the next operation. If you are working on a co-product job, this field is unavailable.

Reverse Quantity
To return items from the next operation, select this check box.

Whse
If applicable, specify the warehouse from which to return items.

5 If the current job is a co-product job, select the **Co-Products** tab and specify this information for each co-product listed on the tab:

Completed Qty
Specify the number of completed items for the selected operation.

Moved Qty
Specify the number of completed items to move to the next operation.

Scrapped Qty
Specify the quantity of items to scrap.

Reason Code
If applicable, specify a reason code for any scrapped items.

Lot
If applicable, scan the lot number.

Next Op
Optionally, specify the next operation that will follow the current one.

- If applicable, use the **Details** tab to display operation related data. The tab displays the received quantity of the operation.
- If applicable, specify the lot number on the **Lot/Serial** tab. If you are working on a co-product job, this tab is unavailable.
- If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See Assigning Serial Numbers for details. You must assign all unassigned serial numbers to return the items from the next operation. If you are working on a co-product job, this tab is unavailable.
- If applicable, select **Backflush Lots** to backflush material for other operations. See "Backflushing Lot Material for Job Operations" on page 18 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
- If applicable, select **Backflush Serials** to backflush serialized material for other operations. See "Backflushing Serialized Material for Job Operations" on page 19 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
- To move the specified quantity of completed items from the next operation, select the green process button.

6 If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form.

Scrapping Items

Use the Job Move, End Machine, End Run, End Run Only, End Team Run, or Team Member Reporting form to scrap items for an operation. You can only scrap items if **Allow Scrap** is selected for this transaction. Follow the instructions below to queue items to be scrapped; the items are not actually scrapped until the transaction is completed. For example, when you designate items to scrap on the End Run form, the items are not actually scrapped until the job operation is stopped.

To scrap items:

1 Open the Job Move, End Machine, End Run, End Run Only, End Team Run, or Team Member Reporting form.

2 Specify a job and job suffix.

3 Select the operation number for which you are scrapping items.

4 On the **Scrap** tab, select the **Add** button. A new line is added to the grid on this tab.

5 On the new line, specify this information:

Quantity
Specify the quantity to scrap.

Reason
Specify a reason code for the scrapped items.

6 Optionally, if you have scrapped items by mistake, you can delete the scrapped item records.See "Deleting Records of Scrapped Items" on page 27.

Setting Up Your Kanban System

Before you can perform Kanban replenishment transactions, you must define Kanban warehouses, items, locations, and replenishment cycles.

To set up your Kanban system:

1 Specify prefixes for Kanban and replenishment request numbers using the Kanban Setup form. See "Specifying Kanban Prefixes" on page 63 for more information.

2 Designate Kanban warehouses to be used for Kanban items and define a staging location for Kanban replenishment items using the Kanban Warehouses form. See "Managing Kanban Warehouses" on page 34 for more information.

3 Define and configure Kanban items using the Kanban Items form. See "Managing Kanban Items" on page 32 for more information.

4 Create Kanban replenishment locations using the Kanban Locations form. See "Managing Kanban Locations" on page 33 for more information.

5 Define locations and replenishment cycle details for Kanbans using the Kanban Item Locations form. See "Defining Kanban Locations" on page 24 and "Defining Kanban Replenishment Cycles" on page 24 for more information.

6 Create Kanbans using the Kanban Item Locations form. See "Creating Kanbans" on page 22 for more information.

7 Print barcode labels for the created Kanbans using the Kanban Label Printing form. See "Printing Kanban Labels" on page 40 for more information.

Signing In as a Generic User

Use the Employee Authentication form to sign in as a generic user. As a generic user you are able to perform transactions using the Work Center Navigation Home and Work Center forms. Upon performing a full transaction as a generic user, you will need to sign in again using the Employee Authentication form before performing another transaction. Only transactions that have **Discrete Transaction** parameter is selected are considered full transactions for this purpose. If the **Discrete Transaction** parameter is cleared for a transaction, you will not be forced to sign in again after performing that transaction as a generic user.

1. Log into Factory Track using a user account that is not linked to an employee. The Employee Authentication form is displayed.
2. Specify your badge ID and PIN number. You only need to specify a PIN number if the **PIN Required** parameter is selected on the Global Parameters form.
3. Select **Sign In**.

After signing in, you can end your session as a generic user by selecting the close button in the top left corner of the Employee Authentication form. This close button is only available if the **Allow Generic Employee to End Session** parameter is selected on the Global Parameters form.

Specifying Kanban Prefixes

Use the Kanban Setup form to specify Kanban prefixes.

To specify Kanban prefixes:

1. Open the Kanban Setup form.
2. Specify this information:

   Request Prefix
   Specify a prefix to use for Kanban request numbers.

   Kanban Prefix
   Specify a prefix to use for Kanbans.

3. Click **Save**.

Specifying Lot Attributes

Use the Lot Attributes form to specify attributes for newly created lots. If the **Enter Lot Attributes** parameter on the Global Parameters form has a value of **Always** or **Ask**, the Lot Attributes form is opened when you create a new lot using one of these transactions:

- End Machine
- End Run
- End Team Run
- Just-In-Time Production
- Job Move

- Job Receipt
- Production Schedule Receipt
- Team Member Reporting
- Workset Maintenance

To specify lot attributes:

1 On the Lot Attributes form, specify this information:

   Item
   Scan the item number.

   Lot
   Scan the lot number.

2 Specify the correct values in each of the attribute fields.
3 Select the green process button.

Starting Indirect Tasks

Use the Start Indirect form to start indirect tasks. These are tasks that do not involve the completion of operation quantities; examples include facility maintenance and meetings. You can only have one indirect task running at a time.

To start indirect tasks:

1 Open the Start Indirect form.
2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3 In the **Indirect Code** field, select the code for the task you are starting.
4 To start the selected task, select the green process button. To close the form without starting any tasks, select the **Close** button.

Starting Indirect Tasks Using the Work Center Form

Only non-workset-enabled employees can start indirect tasks. To add an indirect task to a workset or start a workset, see the Adding Indirect Tasks to Worksets or Starting Worksets sections.

To start an indirect task:

1 Open the Work Center form.
2 In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3 In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default.
4 Select **Start Indirect**. The Start Indirect form is opened. Use these forms to start the task. See "Starting Indirect Tasks" on page 64for more information.

Starting Job Operations

Use the Start Run form to start job operations for individual employees. To start job operations for a team, see "Starting Job Operations for a Team" on page 65.

To start a job operation:

1 Open the Start Run form.

Note: An employee without the correct skills to start the job transaction, gets this message: `The employee does not have sufficient skills for this job Transaction`.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. The date and time can only be modified when a user ID has the appropriate authorizations on the User Extensions form.

3 Specify a job, suffix, and operation. The item number, unit of measure, job status the total, scrapped, completed, and remaining quantities on the **Details** tab. To view the current progress of each operation in the selected job, select the **Progress** tab. Specify a job, job suffix, and operation. When a job/operation is selected the **Details** tab displays the item number, unit of measure, job status the total, scrapped, completed, and remaining quantities. The Progress tab displays progress of the selected job.

4 The employee can select the **Combine Labor and Machine Time** check box to report machine time as a ration of labor time. When FT Time Track module is implemented the employee can specify the ration using the field **Machine Ratio**, that is displayed when **Combine Labor and Machine Time** is checked

5 Employees can select a **resource ID** for starting a transaction.

- You can only view the **resource ID** field on start and end forms, if the global parameter **Display Resource ID** is selected.
- The **resource ID** field displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
- Employee can only select resources associated with the job, if the parameter **Only allow job resource** is selected. However, employee can enter any valid resource if **Only allow job resource** is not selected.
- The **Machine Resource** field is displayed when the Combine Labor and Machine Time is checked.
- The dropdown list for the **Machine Resource** field displays resources that are in the resource groups on the Syteline job operations form's **resource**tab

6 To start the selected operation, select the green process button. To close the form without starting any operations, select the **Close** button.

Starting Job Operations for a Team

Use the Start Team Run form to start job operations for a team. When you start an operation for a team, all team members are assigned to that operation. To access the Start Team Run form, the user must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group. To start job operations for individual employees, see "Starting Job Operations" on page 65.

To start a job operation for a team:

1 Open the Start Team Run form.

   Note: If the Start Team Run form is started from the Home page, the form performs a check for the team with the particular employee and populates the **team** and **badge** fields.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. The date and time can only be modified when a user ID has the appropriate authorizations on the User Extensions form.
3 Specify the team name or team badge ID.
4 Specify a job, suffix. The item number, unit of measure, job status the total, scrapped, completed, and remaining quantities on the **Details** tab. To view the current progress of each operation in the selected job, select the **Progress** tab. Specify a job, job suffix, and operation. When a job/operation is selected the **Details** tab displays the item number, unit of measure, job status the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Progress** tab
5 The employees can select a **resource ID** for starting the labor transaction.
   - You can only view the **resource ID** field on start and end forms, if the **Display Resource ID** global parameter is true.
   - The **resource ID** displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
   - When the global parameter Only Allow Job Resources is true the employee can only select or enter resources that are associated with the job. However, when the global parameter Only Allow Job Resources is false any valid resource can be used.

6 To start the selected operation, select the green process button. To close the form without starting any operations, select the **Close** button.

Starting Job Operations, Just-In-Time Production, Production Schedules, and Setup Using the Work Center Form

Only non-workset-enabled employees can start job operations, Just-In-Time production, production schedules, or setup activities. To add a job operation or setup activity to a workset or to start a workset, see the Adding Job Operations, Setup Activities, and Labor Reporting to Worksets or Starting Worksets sections.

1 Open the Work Center form.
2 In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3 In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The operations that are ready to be started are displayed on the **Job List** tab or PS / JIT tab.
4 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the Work Center Popup Enabled parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.
5 Select an operation from the **Job List** tab or **PS / JIT** tab.
6 Select **Start Run** , **Start JIT** , or **Start Setup** .

If the **Work Center Popup Enabled** parameter is cleared, the operation is started.

If the **Work Center Popup Enabled** parameter is selected, the Start Run, Start Just-In-Time, Start Production Schedule, or Start Setup form is opened. Use these forms to start the operation or activity. See "Starting Job Operations" on page 65, "Starting Just-In-Time Production Orders" on page 67, "Starting Production Schedules" on page 71, or "Starting Setup Activities" on page 71 for more information.

Starting Just-In-Time Production Orders

Use the Start Just-In-Time form to report time to Just-In-Time production orders. You can only use the Start Just-In-Time form if the Time Track module is not implemented.

To start a Just-In-Time production order:

1. Open the Start Just-In-Time form.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. Specify this information:

   Item
   Scan an item number. The item description and unit of measure are displayed on the **Details** tab.

   Warehouse
   Select a warehouse.

   Work Center
   Select a work center.

   Shift
   Select your shift.

4. To start Just-In-Time production, select the green process button.

Starting Labor Hours Reporting for a Project

1. Open the Project Labor Start form.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. Specify this information:

   Project
   Specify a project number. The project name, customer, start date, and project type are displayed on the **Details** tab.

   Task
   Select a task.

Cost Code
Select a cost code.

4 To start reporting labor hours for the project, select the green process button. To close the form without reporting labor hours, select the **Close** button.

Starting Labor Hours Reporting for a Project Using the Work Center Form

Only non-workset-enabled employees can start labor hours reporting for a project. To add project labor to a workset or to start a workset, use the Workset Maintenance form. Select **Maintain** to open this form. See "Managing Worksets" on page 12 for more information.

To start labor hours reporting for a project:

1 Open the Work Center form.
2 In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3 In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The projects that are ready to be started are displayed on the **Project Labor** tab.
4 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.
5 Select an operation from the **Project Labor** tab.
6 Specify this information:

   Project
   Specify a project number. The project name, customer, start date, and project type are displayed on the **Details** tab.

   Task
   Select a task.

   Cost Code
   Select a cost code.

7 Select **Start Run**.

   If the **Work Center Popup Enabled** parameter is cleared, the operation is started.

   If the **Work Center Popup Enabled** parameter is selected, the Start Project Labor form is opened. Use the Start Project Labor form to start the operation. See "Reporting Labor Hours for a Project" on page 56 for more information.

Starting Labor Hours Reporting for a Service Order

1 Open the Project Labor Start form.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3 Specify this information:

   Project
   Specify a project number. The project name, customer, start date, and project type are displayed on the **Details** tab.

   Task
   Select a task.

   Cost Code
   Select a cost code.

4 To start reporting labor hours for the project, select the green process button. To close the form without reporting labor hours, select the **Close** button.

Starting Labor Hours Reporting for a Service Order Using the Work Center Form

Only non-workset-enabled employees can start labor hours reporting for a service order. To add service order labor to a workset or to start a workset, use the Workset Maintenance form. Select **Maintain** to open this form. See "Managing Worksets" on page 12 for more information.

To start labor hours reporting for a service order:

1 Open the Work Center form.
2 In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3 In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The service orders that are ready to be started are displayed on the **Service Labor** tab.
4 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.
5 Select an operation from the **Service Labor** tab.
6 Specify this information:

   Partner ID
   Specify a partner number.

   SRO
   Specify a service order to for which to report hours.

   Line
   Scan the item number of the material you are issuing.

   Operation
   Select an operation.

7 Select **Start Run**.

If the **Work Center Popup Enabled** parameter is cleared, the operation is started.

If the **Work Center Popup Enabled** parameter is selected, the Start Service Labor form is opened. Use the Start Service Labor form to start the operation.

Starting Machine Operations

Use the Start Machine Time form to start machine operations for a job.

To start a job operation:

1. Open the Start Machine Time form.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. The employee can only modify the date and time when the user ID has the appropriate authorizations on the User Extensions form.
3. Specify a job, job suffix, and operation. When a job/operation is selected the **Details** tab displays the item number, unit of measure, job status the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Progress** tab.
4. Employees can use the new field **Machine Resource** to specify a resource when starting a labor transaction.
    - The dropdown list for the **Machine Resource** field displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
5. The **Details** tab displays operation related data. The tab displays item information, the work center, job/operation quantity information and other job information.
6. To start the selected operation, click the green process button. To close the form without starting any operations, click the **Close/Exit** button.

Starting Machine Operations Using the Work Center Form

Only non-workset-enabled employees can start machine operations. To add a machine operation to a workset, use the Workset Maintenance form. Select **Maintain** to open this form. See "Managing Worksets" on page 12 for more information.

To start a machine operation:

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The operations that are ready to be started are displayed on the **Job List** tab.
4. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.

5 Select an operation from the **Job List** tab.

6 Select **Start Machine**.

If the **Work Center Popup Enabled** parameter is cleared, the operation is started.

If the **Work Center Popup Enabled** parameter is selected, the Start Machine form is opened. Use the Start Machine form to start the operation. See "Starting Machine Operations" on page 70 for more information.

Starting Production Schedules

Use the Start Production Schedule form to report time to production schedules. You can only use the Start Production Schedule form if the Time Track module is not implemented.

To start a production schedule:

1 Open the Start Production Schedule form.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

3 Specify this information:

Item
Scan an item.

Schedule
Select a production schedule.

Work Center
Select a work center.

Operation
Select an operation.

Note:

- If the production schedule is not specified and the emplyee clicks **Submit** button, the application displays this message; `Please enter a valid schedule`.
- If the work center and operation is not specified and the emplyee clicks **Submit** button, the application displays this message; `Operation Input is Required`. Also, the form validates the work center value, if no value is specified the applictaion displays this message; `Work Center input is required please enter a valid work center`.

4 To start the production schedule, select the green process button.

Starting Setup Activities

Use the Start Setup form to start job setup activities. Setup activities are the initial tasks that need be completed for a job/operation before production work can begin.

To start setup activity:

1 Open the Start Setup form.
2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. The date and time can only be modified when a user ID has the appropriate authorizations on the User Extensions form.
3 Specify a job, job suffix and operation. When a job/operation is selected the **Details** tab displays the item number, unit of measure, job status the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Progress** tab.
4 The employee can select the **Combine Labor and Machine Time** check box to report machine time as a ration of labor time. When FT Time Track module is implemented the employee can specify the ratio using the field **Machine Ratio**, that is displayed when **Combine Labor and Machine Time** is checked.
5 Employees can select a **resource ID** for starting a labor transaction.
   - You can only view the **resource ID** field on start and end forms, if the global parameter Display Resource ID is selected.
   - The **resource ID** field displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
   - Employee can only select resources associated with the job, if the parameter Only allow job resource is selected. However, employee can enter any valid resource if Only allow job resource is not selected.
   - The dropdown list for the **Machine Resource** field displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
6 To start setup activity for the selected operation, select green process button. To close the form without starting setup activity, select the **Close** button.

Starting Worksets

Starting a workset starts all of its operations, tasks, activities, projects and service labor.

To start a workset:

1 Open the Workset Maintenance form.
2 In the **Type** field, select **Employee** or **Team**.
3 Specify your team or your badge ID.
4 To view the workset associated with the specified team or badge ID, select **Refresh Workset**. The operations and tasks in the workset are displayed in the grid on the **Workset** tab.
5 To start the workset, select **Start All**.

Starting Worksets Using the Work Center Form

Only workset-enabled employees can start worksets.

To start your workset:

1 Open the Work Center form.

2 In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3 In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default.
4 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.
5 Select **Start**.

If the **Work Center Popup Enabled** parameter is cleared, your workset is started.

If the **Work Center Popup Enabled** parameter is selected, the Workset Maintenance form is opened. Use the Workset Maintenance form to start your workset. See "Managing Worksets" on page 12 for more information.

Stopping a Workset

You will not be able to report additional completed or scrapped quantities when stopping an entire workset. To report additional completed or scrapped quantities for operations, you must stop them individually.

To stop an individual job on a workset, see "Stopping an Individual Job on a Workset" on page 73.

1 Open the Workset Maintenance form.
2 In the **Type** field, select **Employee** or **Team**.
3 Specify your team or your badge ID.
4 To view the workset associated with the specified team or badge ID, select **Refresh Workset**. The operations, tasks, activities, and service labor in the workset are displayed in the grid on the **Workset** tab.
5 Select **End All**. The workset and all its operations, tasks, activities, and service labor are stopped.

Stopping an Individual Job on a Workset

To stop an individual job on a workset:

1 Open the Workset Maintenance form.
2 In the **Type** field, select **Employee** or **Team** .
3 Specify your team or your badge ID.
4 To view the workset associated with the specified team or badge ID, select **Refresh Workset**. The operations and tasks in the workset are displayed in the grid on the **Workset** tab.
5 On the **Workset** tab, select the operation or task you are stopping.
6 Select **End**. If applicable, the Quantity Enter form is displayed.
7 If applicable, on the Quantity Enter form, specify this information:

   Good
   Specify the number of completed items for the selected operation.

Moved
Specify the number of completed items to move to the next operation.

Scrapped
Specify the quantity of items to scrap.

Reason Code
Specify a reason code for the scrapped items.

8 Select **End**. If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

Stopping Indirect Tasks

Use the End Indirect form to stop indirect tasks.

To stop indirect tasks:

1 Open the End Indirect form. The code for the running indirect task is displayed along with the task start time and elapsed time.

   Note: If the End Indirect form is started from the Home page the form defaults the indirect code from the start indirect record for the employee. If no start record is found, the form displays the message: `Employee: xxx does not have an indirect transaction running` with an ok button. When the employee clicks the button the form is closed.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

3 To stop the indirect task, select the green process button. To close the form without stopping the indirect task, select the **Close** button.

Stopping Job Operations

Use the End Run form to stop job operations. You can report completed and moved quantities, scrap items, and assign lot and serial numbers when stopping job operations. To perform these activities for a job operation that has not started, use the End Run Only form.

Note: The "End Run Only" form is a time track only form.

To stop a job operation:

1 Open the End Run form.

   Note: If the End Run form is started from the Home page the form defaults the job fields from the start run record for the employee. If no start record is found, the form displays the message: `Employee: xxx does not have a run transaction running` with an ok button. When the employee clicks the button the form is closed.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3 Specify a job and job suffix. The item number, unit of measure, warehouse, and job status are displayed along with the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Progress** tab.
4 Select the operation number you are stopping. The work center where the operation will be performed is displayed along with the time the operation started and the elapsed time.
5 Specify or review this information:

Good
Specify the number of completed items for the selected operation.

Moved
Specify the number of completed items to move to the next operation. This value might be specified by default. If Time Track is implemented and this is the last operation on the order, this field is unavailable.

Complete Operation
If you are completing the operation, select this check box. This check box is only available if **Allow Operation Complete** is selected for this transaction.

Close Job
If you are completing the operation and it is the last operation on the job, select this check box. This check box is only available if Time Track is not implemented and **Allow Close Job** is selected for this transaction.

Combine Labor and Machine Time
Select this check box to report machine time as a ratio of labor time for this operation. Clear this check box to report machine time manually in a separate transaction. If the Time Track module in Infor Factory Track is implemented, this check box is only available if the **Combine Labor and Machine Time** check box is selected for your employee type on the Employee Types form.

Machine Ratio
This field is only displayed if **Combine Labor and Machine Time** is selected and if the Time Track module in Infor Factory Track is implemented. Specify a machine ratio. The machine ratio determines what portion of the reported labor time will be reported for the machine. For example, a ratio of **.5** will report half the reported labor time for the machine. If the Time Track module is not implemented and the **Combine Labor and Machine Time** check box is selected, this field is unavailable and machine time will be reported as a one-to-one ratio to labor time.

Resource ID
Employees can select a **resource ID** for starting a labour transaction if the **Combine Labor and Machine Time** check box is selected.

- You can only view the **resource ID** field on start and end forms, if the **Display Resource ID** is selected.
- The **resource ID** displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
- Employee can only select resources associated with the job, if the parameter **Only allow job resource** is selected. However, employee can enter any valid resource if **Only allow job resource** is not selected.

- The **Machine Resource** field is displayed and the value is based on the validation of the **resource ID** field.

Location
If applicable, specify the stock location where the completed items are to be received. This field is only available if:

- the last operation of the job is selected
- the **Put Away** parameter is selected for this transaction
- and Time Track is not implemented

Issue to Parent
Select **Yes** to issue completed items from this sub-assembly job to its parent job. This field is only displayed if:

- the **Prompt for issue to Parent Job** parameter is selected on the Generic MES_JobMove Parameters form
- a parent job is defined as the destination for the completed items
- this is last operation for this sub-assembly job

To Container
Select this check box to issue the completed items to a container. This check box is only displayed if you do not have the Time Track module implemented and this is the last operation.

Container
Scan a container to which to issue the completed items. Optionally, leave blank to generate a new container number. This field is only displayed if the **To Container** check box is selected.

- If applicable, use the **Details** tab to display operation related data. The tab displays the received quantity of the operation.
- If applicable, use the **Scrap** tab to scrap items. See "Scrapping Items" on page 61 for details. This tab is only available if **Allow Scrap** is selected for this transaction.
- If applicable, specify the lot number on the **Lot/Serial** tab. If backflushing is required or Time Track is implemented, the **Lot/Serial** tab is unavailable.
- If applicable, select the arrow button on the Lot/Serial tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to stop the operation. If backflushing is required or Time Track is implemented, the **Lot/Serial** tab is unavailable.
- If applicable, select **Backflush Lots** to backflush material for other operations. See "Backflushing Lot Material for Job Operations" on page 18 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
- If applicable, select **Backflush Serials** to backflush serialized material for other operations. See "Backflushing Serialized Material for Job Operations" on page 19 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
- To stop the selected operation, select the green process button.

If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

If the **Print Labels** parameter is selected for this transaction, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form.

Stopping Job Operations for a Team

Use the End Team Run form to stop job operations for a team. You can report completed and moved quantities, scrap items, and assign lot and serial numbers when stopping job operations. To access the End Team Run form, you must be assigned to the **Administrator**, **TeamLeader**,or **Supervisor** permission group. To stop job operations for individual employees, see "Stopping Job Operations" on page 74.

To stop a job operation:

1 Open the End Team Run form.

  Note: If the End Team Run form is started from the Home page, the form defaults the job fields for the employee. If no start record is found, the form displays the message: `Employee: xxx does not have a run transaction running` with an ok button. When the employee clicks the button the form is closed.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3 Specify the team name or team badge ID.
4 Specify a job and job suffix. The item number, unit of measure, warehouse, and job status are displayed along with the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Progress** tab.
5 Select the operation number you are stopping. The work center where the operation will be performed is displayed along with the time the operation started and the elapsed time.
6 Specify or review this information:

  Good
  Specify the number of completed items for the selected operation.

  Moved
  Specify the number of completed items to move to the next operation. This value might be specified by default. If Time Track is implemented and this is the last operation on the order, this field is unavailable.

  Complete Operation
  If you are completing the operation, select this check box. This check box is only available if **Allow Operation Complete** is selected for this transaction.

  Close Job
  If you are completing the operation and it is the last operation on the job, select this check box. This check box is only available if **Allow Close Job** is selected for this transaction.

  Combine Labor and Machine Time
  Select this check box to report machine time as a ratio of labor time for this operation. Clear this check box to report machine time manually in a separate transaction. If the Time Track module in

Infor Factory Track is implemented, this check box is only available if the **Combine Labor and Machine Time** check box is selected for your team on the Team Maintenance form.

Machine Ratio
This field is only displayed if **Combine Labor and Machine Time** is selected and if the Time Track module in Infor Factory Track is implemented. Specify a machine ratio. The machine ratio determines what portion of the reported labor time will be reported for the machine. For example, a ratio of **.5** will report half the reported labor time for the machine. If the Time Track module is not implemented and the **Combine Labor and Machine Time** check box is selected, this field is unavailable and machine time will be reported as a one-to-one ratio to labor time.

Resource ID
Employees can select a **resource ID** for starting a labour transaction if the **Combine Labor and Machine Time** check box is selected.

- You can only view the **resource ID** field on start and end forms, if the **Display Resource ID** is selected.
- The **resource ID** displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
- Employee can only select resources associated with the job, if the parameter **Only allow job resource** is selected. However, employee can enter any valid resource if **Only allow job resource** is not selected.
- The **Machine Resource** field is displayed and the value is based on the validation of the **resource ID** field.

Note:

- When a Team run is completed the **resource ID** is included on the record for the first member of the team who started the run.
- The **resource ID** follows the same logic as that of recording the quantity.

Location
If applicable, specify the stock location where the completed items are to be received. This field is only available if the last operation of the job is selected and if the **Put Away** parameter is selected for this transaction.

- If applicable, use the **Details** tab to display operation related data. The tab displays the received quantity of the operation.
- If applicable, use the **Scrap** tab to scrap items. See "Scrapping Items" on page 61 for details. This tab is only available if **Allow Scrap** is selected for this transaction.
- If applicable, specify the lot number on the **Lot/Serial** tab.
- If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to stop the operation.
- To stop the selected operation, select the green process button.

If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

Stopping Job Operations, Indirect Tasks, Machine Operations, and Setup Activities Using the Work Center Form

Only non-workset-enabled employees can stop operations, Just-In-Time production, production schedules, tasks, activities, projects or service labor reporting. To stop a workset, see the "Stopping Worksets Using the Work Center" on page 86.

If the **Work Center Popup Enabled** parameter is cleared, you will not be prompted to report completed quantities when stopping an operation. To report completed quantities, see the Reporting Completed Quantities section.

To stop an operation, task, or activity:

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The operations, tasks, and activities that are running are displayed on the **Active Transactions** tab.
4. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.
5. Select an operation, task, or activity from the **Active Transactions** tab.
6. Select **End**.

If the **Work Center Popup Enabled** parameter is cleared, the operation, task, activity, or labor reporting is stopped.

If the **Work Center Popup Enabled** parameter is selected, the End Run, End Just-In-Time, End Production Schedule, End Indirect, End Setup, Project Labor Stop or Service Labor Stop form is opened. Use these forms to stop the operation, task, or activity. See "Stopping Job Operations" on page 74, "Stopping Just-In-Time Production Orders" on page 79, "Stopping Production Schedules" on page 83,"Stopping Indirect Tasks" on page 74, "Stopping Setup Activities" on page 85, "Reporting Labor Hours for Project" on page 56 or "Reporting Labor Hours for a Service Order" on page 57 for more information.

Stopping Just-In-Time Production Orders

Use the End Just-In-Time form to stop Just-In-Time production. You can report completed quantities and assign lot and serial numbers when stopping Just-In-Time production.

To stop Just-In-Time production:

1. Open the End Just-In-Time form.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. Specify this information:

Item
Scan an item number. The item description and unit of measure are displayed on the **Details** tab.

Qty Completed
Specify the number of completed items.

Warehouse
Select a warehouse.

Work Center
Select a work center.

Shift
Select your shift.

To Container
Select this check box to issue the completed items to a container.

Container
Scan a container to which to issue the completed items. Optionally, leave blank to generate a new container number. This field is only displayed if the **To Container** check box is selected.

- If applicable, specify the lot number on the **Lot/Serial** tab. If backflushing is required or Time Track is implemented, the **Lot/Serial** tab is unavailable.
- If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See Assigning Serial Numbers for details. You must assign all unassigned serial numbers to stop the operation. If backflushing is required or Time Track is implemented, the **Lot/Serial** tab is unavailable.
- If applicable, select **Backflush Lots** to backflush material for other operations. See Backflushing Lot Material for Job Operations for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
- If applicable, select **Backflush Serials** to backflush serialized material for other operations. See Backflushing Serialized Material for Job Operations for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
- To stop Just-In-Time production, select the green process button.

If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See Specifying Lot Attributes for details.

4 If the **Print Labels** parameter is selected on the Transaction Settings form, labels are automatically printed or the Label Printing form is opened. See Printing Labels for information about printing labels using the Label Printing form.

Stopping Labor Hours Reporting for a Project

1 Open the Project Labor End form.

Note: If the End Project Labor form is accessed from the Home page, the form populates all of the job fields of the required employee. If no start record is found, the application displays this messgae: `Employee: xxx does not have a Project Labor transaction running` with an ok button.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3 Specify this information:

Project
Specify a project number. The project name, customer, start date, and project type are displayed on the **Details** tab.

Task
Select a task.

Cost Code
Select a cost code.

Pay Type
Select a pay type to use for the reported hours:

- **Regular**
- **Overtime**
- **Double-Time**

4 To stop reporting labor hours for the project, select the green process button. To close the form without reporting labor hours, select the **Close** button.

Stopping Labor Hours Reporting for a Service Order

1 Open the Project Labor End form.
2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3 Specify this information:

Project
Specify a project number. The project name, customer, start date, and project type are displayed on the **Details** tab.

Task
Select a task.

Cost Code
Select a cost code.

Pay Type
Select a pay type to use for the reported hours:

- **Regular**
- **Overtime**
- **Double-Time**

4 To stop reporting labor hours for the project, select the green process button. To close the form without reporting labor hours, select the **Close** button.

Stopping Machine Operations

Use the End Machine form to stop machine operations for a job. You can report completed and moved quantities, scrap items, and assign lot and serial numbers when stopping machine operations.

To stop a machine operation:

1 Open the End Machine form.

Note: If the End Machine form is started from the Home page the form defaults the job fields from the start machine record for the employee. If no start record is found, the form displays the message: `Employee: xxx does not have a run transaction running` with an ok button. When the employee clicks the button the form is closed.

2 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

3 Specify a job and job suffix. The item number, unit of measure, warehouse, and job status are displayed along with the total, scrapped, completed, and remaining quantities. To view the current progress of each operation in the selected job, select the **Progress** tab.

4 Select the operation number you are stopping. The work center where the operation will be performed is displayed along with the time the operation started and the elapsed time.

5 Specify or review this information:

Good
Specify the number of completed items for the selected operation.

Moved
Specify the number of completed items to move to the next operation. This value might be specified by default. If Time Track is implemented and this is the last operation on the order, this field is unavailable.

Complete Operation
If you are completing the operation, select this check box. This check box is only available if **Allow Operation Complete** is selected for this transaction.

Close Job
If you are completing the operation and it is the last operation on the job, select this check box. This check box is only available if Time Track is not implemented and **Allow Close Job** is selected for this transaction.

Resource ID
Employees can select a **resource ID** for starting a labour transaction.

- You can only view the **resource ID** field on start and end forms, if the **Display Resource ID** is selected.
- The **resource ID** displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.

- The **Machine Resource** field is displayed and the value is based on the validation of the **resource ID** field.

Location
If applicable, specify the stock location where the completed item is to be received. This field is only available if:

- the last operation of the job is selected
- the **Put Away** parameter is selected for this transaction
- and Time Track is not implemented

- If applicable, use the **Details** tab to display operation related data. The tab displays the received quantity of the operation.
- If applicable, use the **Scrap** tab to scrap items. See "Scrapping Items" on page 61 for details. This tab is only available if **Allow Scrap** is selected for this transaction.
- If applicable, specify the lot number on the **Lot/Serial** tab. If Time Track is implemented, the **Lot/Serial** tab is unavailable.
- If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to stop the operation. If Time Track is implemented, the **Lot/Serial** tab is unavailable.
- To stop the selected operation, select the green process button.

If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.

Stopping Production Schedules

Use the End Production Schedule form to stop production schedules. You can report completed quantities and assign lot and serial numbers when stopping production schedules.

To stop production schedules:

1. Open the End Production Schedule form.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. Specify this information:

   Item
   Scan an item number.

   Schedule
   Select a production schedule.

   Work Center
   Select a work center.

   Operation
   Select an operation.

Shift
Select your shift.

To Container
Select this check box to issue the completed items to a container.

Container
Scan a container to which to issue the completed items. Optionally, leave blank to generate a new container number. This field is only displayed if the **To Container** check box is selected.

Good Qty
Specify the number of completed items.

Scrapped Qty
If applicable, specify the number of scrapped items.

Scrapped Reason
Select a reason for any scrapped items. This field is only displayed if are scrapping items.

Note:

- If the End Production Schedule form is accessed from the Home page, the form populates the **Item**, **Schedule**, **Work Center**, and **Operation** fields for the required employee. If no start record is found, the application displays this message; `Employee: xxx does not have a Production Schedule Labor transaction running` with an ok button.
- If the End Production Schedule form is accessed in non-Time Track mode, the form populates the **Shift** field for the required employee's shift in the ERP. When the form is accessed in Time Track mode the **Shift** field is not displayed. If the record is written or submitted, the standard Time Track rules are used to determine the shift and the labor time is recorded in the Time Track labor tables. If the labor is written to Syteline the standard Time Track rules for using the default/generic shift must be used to pass the **shift** for the Syteline.

4. If applicable, specify the lot number on the **Lot/Serial** tab. If backflushing is required or Time Track is implemented, the **Lot/Serial** tab is unavailable.
5. If applicable, select the arrow button on the **Lot/Serial** tab to assign serial numbers. See "Assigning Serial Numbers" on page 17 for details. You must assign all unassigned serial numbers to stop the operation. If backflushing is required or Time Track is implemented, the **Lot/Serial** tab is unavailable.
6. If applicable, select **Backflush Lots** to backflush material for other operations. See "Backflushing Lot Material for Job Operations" on page 18 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
7. If applicable, select **Backflush Serials** to backflush serialized material for other operations. See "Backflushing Serialized Material for Job Operations" on page 19 for details. This button is only available if the item is lot-controlled, and the item and operation are eligible for backflushing.
8. To stop production schedules, select the green process button.
9. If you are creating a new lot, you might be prompted to specify lot attributes. If the Lot Attributes form is displayed, specify lot attributes. See "Specifying Lot Attributes" on page 63 for details.
10. If the **Print Labels** parameter is selected on the Transaction Settings form, labels are automatically printed or the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels using the Label Printing form.

Stopping Setup Activities

Use the End Setup form to stop job setup activities. Setup activity is the initial tasks that need be completed for an operation before production work can begin.

To stop setup activity:

1. Open the End Setup form.

   Note: If the End Setup form is started from the Home page the form defaults the job fields from the start setup record for the employee. If no start record is found, the form displays the message: `Employee: xxx does not have a setup transaction running` with an ok button. When the employee clicks the button the form is closed.

2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. Specify a job and job suffix. The item number and description are displayed.
4. Select the operation number for the setup activity you are stopping. The work center where the operation will be performed is displayed along with the time the setup activity started and the elapsed time.
5. If applicable, select **Combine Labor and Machine Time** to report machine time as a ratio of labor time for this activity. Clear this check box to report machine time manually in a separate transaction. If the Time Track module in Infor Factory Track is implemented, this check box is only available if the Combine Labor and Machine Time check box is selected for your employee type on the Employee Types form.
6. If applicable, specify a machine ratio. The **Machine Ratio** field is only displayed if **Combine Labor and Machine Time** is selected and if the Time Track module in Infor Factory Track is implemented. The machine ratio determines what portion of the reported labor time will be reported for the machine. For example, a ratio of **.5** will report half the reported labor time for the machine. If the Time Track module is not implemented and the **Combine Labor and Machine Time** check box is selected, this field is unavailable and machine time will be reported as a one-to-one ratio to labor time.
7. Employees can select a **resource ID** for starting a labour transaction if the **Combine Labor and Machine Time** check box is selected.
   - You can only view the **resource ID** field on end forms, if the **Display Resource ID** is selected.
   - The **resource ID** displays resources that are in the resource groups on the Syteline job operations form's **resource** tab.
   - Employee can only select resources associated with the job, if the parameter **Only allow job resource** is selected. However, employee can enter any valid resource if **Only allow job resource** is not selected.
   - The **Machine Resource** field is displayed and the value is based on the validation of the **resource ID** field.

8. To stop the selected activity, select the green process button. To close the form without stopping any activities, select the **Close** button.

Stopping Transactions from Another Report Date

Use the Supervisor Labor Stop form to stop transactions, including transactions that started on another report date. Only supervisors and administrators are authorized to use this form, only if the Time Track is Implemented parameter is cleared in the Global parameter form.

1. Open the Supervisor Labor Stop form.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default.
3. Select a transaction from the Active Transactions list.
4. To stop the transaction, select **End**. To delete the transaction, select **Delete**.

Stopping Worksets Using the Work Center Form

Only workset-enabled employees can stop worksets. If you stop your workset from the Work Center form, you will not be prompted to report additional completed quantities. Use the **Report Quantities** button to report completed quantities before stopping the workset. To stop an individual operation, task, or activity on a workset without stopping the entire workset, select **Maintain**. See "Managing Worksets" on page 12 for more information about stopping individual operations, tasks, or activities on a workset.

To stop your workset:

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The operations, tasks, and activities in your running workset are displayed on the **Active Transactions** tab.
4. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and your user ID has the appropriate authorizations on the User Extensions form.
5. Select **End All**.

If the **Work Center Popup Enabled** parameter is cleared, your workset is stopped.

If the **Work Center Popup Enabled** parameter is selected, the Workset Maintenance form is opened. Use the Workset Maintenance form to stop your workset. See "Managing Worksets" on page 12 for more information.

Using Just-In-Time Production to Fill Kanban Replenishment Requests

Use the Kanban JIT Replenishment form to fill Kanban replenishment requests using just-in-time production.

To use just-in-time production to fill Kanban replenishment requests:

1. Open the Kanban JIT Replenishment form.

2 In the **Replenishment Location** field, select your work area, where the just-in-time production items have been produced. In the Replenishment Requests grid, all Kanban just-in-time production replenishment requests for the selected location that have the status **Requested** or **Staged** are displayed.
3 From the grid, select the request you are filling. The request number, work center location, and Kanban location are displayed.
4 To fill the request, select the green process button. If the **Create Kanban Receipt** parameter is selected for this transaction, the items are received at the Kanban location, and the request status is changed to **Closed**. If this parameter is cleared, the items must be received in a separate transaction, and the request status is changed to **Staged** . If the **Print Labels** parameter is selected for this transaction, the Label Printing form is opened. See "Printing Labels" on page 42 for information about printing labels. To close the form without filling any requests, select the **Close** button.

Using the Work Center UI Form

An employee can use the Work Center form to perform day-to-day labor activities. This form can be configured to open automatically for certain employees when logging into Infor Shop Floor. For more information see Setting Up Forms to Load Automatically. There are two different sets of buttons for this form: one for workset-enabled employees and one for non-workset-enabled employees. The appropriate set of buttons configuration are displayed depending on the configuration of the employee type.

The name of the employee who opened the form is displayed at the top of the form. The employee can use the field marked with a factory icon to select a work center. The work center associated with the employee ID that is selected by default.

The **Job List** tab shows the operations that are ready to start for the selected work center. The employee can sort and filter the jobs that appear in this list using the options on the **Filter/Sort** tab. This information is displayed for each job:

- job number
- job suffix
- operation number
- item number
- item description
- total quantity
- quantity completed
- quantity scrapped
- Work Center
- Resource Group
- Resource
- Slack Time
- Sch

The Work Center functionality is enhanced to display jobs that are scheduled or processed by Syteline scheduler. The **filter/ sort** tab on the work center UI is enhanced to enable the filtering and sorting of job data by the selected **Resource Group** or **Resource**.

The **Res Group** and **Resource** fields allow the employee to set the filter for the data displayed in the Job list tab. Selecting a resource group or resource and clicking the **By Res Group** or **By Resource** buttons, filters the job list. If the Resource Interval parameter is specified, all the jobs scheduled at a future date in this interval are displayed. If this parameter is unchecked, all the scheduled jobs are displayed. This functionality is similar to **Dispatch Interval** parameter on the Syteline Sequencing forms.

Use the **By Resource Group** button to display the jobs for the Resource Group selected in the header.

Use the **By Resource**button to display the jobs for the Resource selected in the header.

Note: If no **Resource Group** or **Resource** is selected, no jobs are displayed.

Use the **Apply Filter/Sort by WC** button to display the jobs for the work center specified in the header.

The employee can sort and filter the jobs using these options on the **Filter/Sort** tab:

- The **resource group** and **resource** buttons allow the employee to filter the data displayed in the **Job list** tab. All the jobs for the selected resource group or resource must be displayed.
- The **Scheduled jobs** filter displays the jobs that are scheduled in Syteline.
- **Res Sequence Sort** option is added to **Sort Options** which sorts the jobs-related data by the scheduler sequence (The same order/sequence use on the SL resource sequencing form).

The **Project Labor** tab shows the project tasks that are ready for labor reporting for the selected work center. This information is displayed for each service order:

- project number
- project start date
- customer name
- project type

The **Project Labor** tab is only displayed if the Show Project Labor Tab parameter is selected for the Work Center UI form.

The **Service Labor** tab shows the service orders that are ready for labor reporting for the selected work center. This information is displayed for each service order:

- service order number
- line number
- operation number
- customer name
- partner

The Service Labor tab is only displayed if the Show Service Labor Tab parameter is selected for the Work Center UI form.

The **PS / JIT** tab shows the Just-In-Time production orders or production schedules that are ready for labor reporting for the selected work center. This information is displayed for each Just-In-Time production order and production schedule:

- due date
- order or production schedule number
- operation or schedule number
- item number
- item description
- total quantity
- quantity completed
- quantity scrapped

The **Active Transactions** tab shows the operations, tasks, activities, and service orders on which you are currently working. The employee can perform labor activities by selecting operations, tasks, and activities from the **Job List** tab, **Service Labor** tab, or **Active Transactions** tab and selecting an activity button on the right side of the form. These buttons are enabled or disabled based upon the selection.

Note:

- If the **Enable Start Run on Select** parameter is selected for this form, the user must double click a row on the **Job List**, or **Project**, or **Service**, or **PS/JIT** tabs to perform a start run.
- On the **Active** tab, the user must double click a row to perform a stop.
- A workset employee can add the job to the workset, by double clicking the selected job without opening the Workset Maintenance form.

If the Work Center Popup Enabled parameter is selected for this form, a separate form will open when the employee selects an action button. You can then perform the desired action on the newly opened form. For example, if you select an operation and click **Add Run**, the Workset Maintenance form is opened, allowing you to add the operation to your workset using that form.

If the **Work Center Popup Enabled** parameter is cleared, most actions listed in the Tasks section or Workset section will be performed directly from the Work Center form. For example, if the employee selects an operation and click **Add Run**, the operation is added to the employee's workset without displaying an additional form.

You can use the Work Center form to perform these activities:

- "add job routing notes" on page 15
- "view job routing notes" on page 96
- "view documents" on page 95
- "report completed and moved quantities" on page 55
- "start job operations, Just-In-Time production, production schedules, and setup activities" on page 66
- "start indirect tasks" on page 64
- "start machine operations" on page 70
- "start labor hours for a project" on page 68
- "start labor hours for a service order" on page 68
- "stop job operations, Just-In-Time production, production schedules, machine operations, indirect tasks, setup activities, or service labor reporting" on page 79

- "add job operations and setup activities to worksets" on page 14
- "add indirect tasks to worksets" on page 13
- "manage worksets" on page 35
- "start worksets" on page 72
- "stop worksets" on page 72
- "Working with resource group and resource filtering"

Using the Work Center Navigation Home Form

Use the Work Center Navigation Home Page form to navigate to other forms or perform actions, such as clocking out for breaks. All forms or actions that a typical employee needs to use on the shop floor are available from this central navigation form. You can configure this form to open automatically for certain employees when they log into Infor Shop Floor. For more information see Setting Up Forms to Load Automatically.

To use the Work Center Navigation Home form:

1. Log into the application using your user name and password. If your user account is configured in the application explorer to auto run the Work Center Navigation Home form, the form is displayed. If it is not displayed, open the Work Center Navigation Home form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default.
4. Optionally, specify a date and time to record for time and Attendance transactions. The current date and time is specified by default. You can only modify the date and time if Infor Time Track is implemented and your user ID has the appropriate authorizations on the User Extensions form.
5. To display the available menu buttons, select one of the categories on the left side of the form. The Time and Attendance category is only available if Infor Time Track is implemented.
6. Select a menu button. The buttons that are available are determined by your user authorizations. These buttons are available by default for the listed categories:

Time and Attendance

"Clocking In"

"Clocking Out"

"Lunch In/Out"

"Employee Home Page - Employee Time Off Requests"

"Break In/Out"

"Employee Home Page - Time Sheet Summary"

Material

"Job Material Issue" on page 105

Labor

Kanban

Miscellaneous

Viewing Container Contents

Use the Container Inquiry form to view information about a container and its contents.

Note: You can only use this form if you do not have the Time Track module implemented.

To view information about a container, on the warehouse mobility icon based menu and list based menu:

1. Select **Move It > Inquiries > Container Inquiry >**
2. In the **Container** field, scan a container. This information about the container is displayed:
   - warehouse
   - location
   - usage type
   - reference order number
   - reference line
   - reference release

Details about the items in the container are displayed on the **Items** tab. This information is displayed for each item in the container:

- item number
- unit of measure
- lot number, if applicable
- contained quantity

3 Optionally, if an item is serial-controlled, select that item from the **Items** tab to view its serial numbers.

Viewing Detailed Job Information

Use the Visual Dispatch form to view detailed information about jobs, including the status of operations, material details, and related transactions.

To view detailed job information:

1 Open the Visual Dispatch form.

2 Specify some or all of this information:

Resource Group
Specify a resource group.

Job
Specify a job number.

3 To execute the search, select the green process button. All job operations that meet the specified search criteria are displayed in the Job Summary grid. This information is displayed for each job operation:

- **Crew**: number of resources assigned to the operation
- **Type**: type of resources assigned to the operation
- **Job**
- **Item**
- **Suffix**
- **Operation**
- **Op. Start**: operation start date
- **Op. End**: operation end date
- **Control Point**
- **Backflush**: whether backflushed hours are for **Labor**, **Machine**, **Both**, or **Neither**
- **Job Start**: job start date
- **Job End**: job end date
- **Received**: quantity released to the job
- **Completed**: quantity completed for the job
- **Scrapped**: quantity scrapped for the job

4 To clear the criteria fields, select **Clear**.

5 To view additional information about a job, select a job from the Job Summary grid. The status of each operation associated with the job is displayed on the **Operations** tab. This information is displayed for each operation:

- **Operation**
- **Work Center**
- **Description**
- **Qty Received**
- **Qty Complete**
- **Qty Scrapped**
- **Qty Moved**
- **Control Point**
- **Backflush**: whether backflushed hours are for **Labor** , **Machine**, **Both**, or **Neither**
- **Op. Start**: operation start date
- **Op. End**: operation end date
- **Actual Setup Hrs**
- **Actual Run Hrs**
- **Actual Machine Hrs**

6 Optionally, to view details about materials for the selected job, select the **Materials** tab. This information is displayed for each material type associated with the job:

- **Seq**
- **Material**
- **Description**
- **Backflush**: whether backflushed hours are for **Labor**, **Machine**, or **Both**
- **Type** : material type
- **UOM**
- **Qty on Hand**
- **Qty Required**
- **Per**
- **Job Qty**
- **Qty Issued**
- **Remaining Qty**

7 Optionally, to view information about all transactions associated with the selected job, select the **Job Transactions** tab. This information is displayed for each transaction:

- **Date**
- **Type** : transaction type
- **Employee**
- **Shift**
- **Qty Complete**

- **Qty Moved**
- **Qty Scrapped**
- **To Location**
- **Reason**
- **Lot**
- **Hours**
- **Status**

8 Optionally, to view information about all transactions associated with the materials for selected job, select the **Material Transactions** tab. This information is displayed for each transaction:

- **Date and Time**
- **Type**: transaction type
- **Item**
- **Description**
- **Quantity**
- **Item U/M**
- **Lot**
- **Warehouse**
- **Location**
- **Issued To**
- **Suffix**
- **Operation**

Viewing Documents

Use this form to view documents related to a job or item. You can access this form from the Work Center form or the Work Center Navigation Home form.

To view documents:

1 To open the Documents form, select **Documents** on the Work Center form or the Work Center Navigation Home form.

2 In the filter section, specify search criteria for finding documents.

3 If you accessed the Documents form from the Work Center form, the Job, Suffix, Operation, and Items fields are automatically populated. You can modify these values if needed.

4 If you accessed the Documents form from the Work Center Navigation Home form, select whether to search for documents by job or by item. Then specify some or all of this information:

Job
Specify the job number. This field is only available when searching by job.

Suffix
Select the job suffix. This field is only available when searching by job.

Operation
Select the operation number. This field is only available when searching by job.

Item
Specify the item number. This field is only available when searching by item.

Revision
Optionally, specify a revision number for the item to only display documents related to that revision number. Leave blank to display documents for all revisions of the selected item. This field is only available when searching by item and only applies to PLM documents.

5. To display documents matching the specified search criteria, select the green process button. The documents are displayed in the Document Listing section. To close the form, select the **Close** button.
6. To view a document, select it from the Document Listing section, and then select the view button. You can open multiple documents to view at the same time. To reset the search fields, select the **Refresh** button.
7. Any changes you make to the opened documents will not be saved.

Viewing Job Routing Notes

You can view job routing notes to review any special instructions for an operation.

To view job routing notes:

1. Open the Work Center form.
2. In the field marked with a person icon near the top of the form, specify your employee ID number. This number may be specified by default.
3. In the field marked with a factory icon near the top of the form, select a work center. Your work center may be specified by default. The operations that are ready to be started are displayed on the **Job List** tab. To view the operations, tasks, and activities on which you are currently working, select the **Active Transactions** tab.
4. Select an operation, task, or activity from the **Job List** tab or the **Active Transactions** tab.
5. Select **Notes**. The Job Routing Notes form is opened. The titles of any notes for the selected operation are displayed in the Subject section.
6. To view a note, select its title in the Subject section.
7. To close the Job Routing Notes form, select the **Close** button.

Viewing the Status of Jobs

Use the Job Status form to view the status of jobs at each operation. You can print status reports for job operations and launch the Visual Dispatch form from this form.

To view the status of jobs:

1. Open the Job Status form.
2. To define job search criteria, specify some or all of this information:

Job
Specify a starting and ending job number and a starting and ending suffix.

Work Center
Specify a starting and ending work center.

Operation Start Date
Specify a starting and ending operation start date.

- In the Sort By section, select whether to sort jobs by job or work center.
- To display job operations matching the specified search criteria, select the green process button. The job operations are displayed in the Job Status Listing section. This information is displayed for each operation:
  - **Job**
  - **Suffix**
  - **Item**
  - **Work Center**
  - **Operation Start Date**
  - **Operation Status**: current status of the operation; these are the possible statuses:
    - **Late**: operation start date is today and no items have been received at the operation
    - **In Process**: at least one item has been received at the operation and no transactions have been executed for the operation
    - **Ready**: at least one item has been received at the operation and no transactions have been executed for the operation
    - **Finished**: either the operation is designated as complete or all required item quantities have been completed
    - **Arriving**: operation date is one to four days in the future and no items have been received at the operation
      - **Today's Target**: quantity scheduled to be completed on the current date
      - **Today's Completed**: quantity completed on the current date
      - **Today's Remaining**: quantity that still needs to be completed to meet the current date's target
      - **Today's Efficiency**: percentage indicating how well the work center is keeping up with the scheduled production progress for the current operation on the current date; for more information about efficiency calculations, see "Work Center Efficiency Overview" on page 12

3 To clear the displayed search results and search criteria fields, select **Clear**. To close the form, select the **Close** button.

- Optionally, to print the displayed operation information as a report, select **Print**. The information in the report will be sorted based on your selection of **Job** or **Work Center** in the Sort By section.
- Optionally, to view additional information about an operation using the Visual Dispatch form. Select an operation record from the Job Status Listing section, and then select **Visual Dispatch**.

The **Visual Dispatch** button is only available if there are operation records available to select in the Job Status Listing section.

Viewing the Status of Kanban Replenishment Requests

Use the Kanban Replenishment Status form to view the status of Kanban replenishment requests. The status of a replenishment request indicates its current place in the replenishment cycle:

- **Requested** : the request has been created and is awaiting fulfillment
- **Ordered** : a purchase order or transfer order has been created to fill the request
- **Staged** : items are ready to be moved from the staging area to the Kanban replenishment location
- **Closed** : the request has been filled

Note: Replenishment requests may also have a status of **Error** if there is a system error associated with the request.

To view the status of Kanban replenishment requests:

1. Open the Kanban Replenishment Status form.
2. To define replenishment request search criteria, specify some or all of this information:

   Item
   Specify a starting and ending item number.

   Warehouse
   Specify a starting and ending Kanban warehouse.

   Work Center Location
   Specify a starting and ending work center location.

   Kanban Location
   Specify a starting and ending Kanban location.

   Kanban
   Specify a starting and ending Kanban number.

3. To display replenishment requests matching the specified search criteria, select the **Refresh** button. The replenishment requests are displayed in the grid. This information is displayed for each request:

   - item
   - warehouse
   - work center location
   - Kanban location
   - Kanban
   - request number
   - request status
   - replenishment quantity
   - request date
   - replenishment source

- replenishment order number, if applicable
- order line
- any errors associated with the request

4 Optionally, to view details for an error associated with a request. Select the relevant request, and then select **Show Error**.

Viewing Workset Details

You can use the **Workset** tab on the Workset Maintenance form to view information about the operations, tasks, activities, projects and service labor on a workset.

To view workset details:

1. Open the Workset Maintenance form.
2. In the **Type** field, select **Employee** or **Team**.
3. Specify your team or your badge ID.
4. Select **Refresh Workset**. Details about the workset are displayed on the **Workset** tab.

Forms

This module includes topics that describe Infor Shop Floor forms. Click the links at the bottom of each Forms page for procedures you can perform using these forms.

Add Job Routing Notes

Use this form to add notes for a job operation. You can access this form by selecting the add note button on the Job Routing Notes form.

Backflush Lots

Use the Backflush Lots form to backflush lot material for job operations. If you are working on an operation and completing material for an item that is lot-controlled and designated for backflushing, you can open the Backflush Lots form by selecting **Backflush Lots** on the parent transaction form. The Backflush Lots form can be opened from these parent transactions: End Run, Job Move, and Job Receipt.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Backflush Serials

Use the Backflush Serials form to backflush serialized material for job operations. If you are working on an operation and completing material for an item that is serial-controlled and designated for backflushing, you can open the Backflush Serials form by selecting **Backflush Serials** on the parent transaction form. The Backflush Serials form can be opened from these parent transactions: End Run, Job Move, and Job Receipt.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Build Container

Use this form to add items to containers.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Note: You can only use this form if you do not have the Time Track module implemented.

Container Inquiry

Use this form to view information about a container and its contents.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Note: You can only use this form if you do not have the Time Track module implemented.

Cross Dock Job Orders

When newly received items are needed urgently for an order, you can use this form to route them directly to the staging area, bypassing the standard put away and picking process to save time. When the conditions are appropriate for cross docking, you can access this form from the Job Move, Just-In-Time Production, and Production Schedule Receipt forms.

Document Integration Parameters

Use this form to configure parameters for integration with PLM and Doc-Trak, allowing users to view documents from these document management systems from within the Infor Factory Track interface.

Note: Infor Factory Track is already configured by default to view to documents from SyteLine as part of the integration process.

Documents

Use this form to view documents related to a job or item. You can access this form from the Work Center form or the Work Center Navigation Home form.

Documents are accessed from Doc-Trak, PLM, or SyteLine. Documents must meet these criteria to be accessed through this form:

- For Doc-Trak, the documents must not be marked as obsolete.
- For PLM, the documents must match the specified revision and the current date must fall within the effective dates of the documents.
- For SyteLine, the documents must be approved and the current date must fall within the effective dates of the documents.

To establish a connection between Infor Factory Track and a PLM or Doc-Trak database, see Configuring Document Integration Parameters.

Employee Authentication

This form is displayed when a user logs into Factory Track with a user account that is not linked to an employee. The employee can use this form to sign in as a generic user. As a generic user the employee is able to perform transactions using the Work Center Navigation Home and Work Center UI forms. When performing a discrete transaction as a generic user, the employee will be signed out automatically and must sign in again using the Employee Authentication form before performing another transaction. Transactions that have the Discrete Transaction parameter set to true are considered discrete transactions and will automatically log the employee out when the transaction is complete for this purpose. When a transaction’s Discrete Transaction parameter is false the generic employee will not be logged out automatically. The PIN number is an additional security precaution for employees signing into Factory Track using the employee authentication screen. The PIN is a string that can be the employee’s badge or any other string used by the employee to uniquely identify the employees.

Factory Track only displays the PIN on the employee authentication screen when the global parameter PIN Required is set to true. Any administrator or user that has access to the Employees transaction can set an employee’s PIN. If the employee is added through the data synch (downloading information from the ERP), then the PIN can be set to a blank value or a specific default. The PIN is stored in the database encrypted much like a password.

The field **PIN Change Required** on the employee record indicates that the employee must change the PIN number the next time the employee access the Employee Authentication form.

When the Employee Authentication transaction is displayed and the PIN Required parameter is true, then the **Change PIN** button is displayed. When the employee is required to change the pin or if the employee wants to change the pin, the employee can use the **Change PIN** button. Clicking the **Change PIN** button to display the **New PIN** field for updating the PIN. When the employee has an existing pin, the employee must enter the existing PIN in the **PIN** field before the entering the new PIN.

Note: When the employee data synch first creates an employee record, a default PIN can be created, for security purposes, the user must change the Pin the first time the employee logs into the system.

Empty Container

Use the Empty Container transaction to remove items from containers.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Note: You can only use this form if you do not have the Time Track module implemented.

End Indirect

Use this form to stop indirect tasks.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

End Just-In-Time

Use this form to stop Just-In-Time production.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

End Machine

Use the End Machine form to stop machine operations for a job. You can report completed and moved quantities, scrap items, and assign lot and serial numbers when stopping machine operations.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

End Production Schedule

Use this form to stop production schedules.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

End Project Labor

Use this form to stop reporting labor hours for a project.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

End Run

Use this form to stop job operations. You can report completed and moved quantities, scrap items, and assign lot and serial numbers when stopping job operations.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

End Run Only

Use this form to report completed and moved quantities for jobs that have not started. Using the End Run Only form allows you to start and stop a job in a single transaction. When you report quantities to a job using this form, a job stop transaction will be recorded at the current time, and a job start transaction will be generated to occur immediately following your most recent transaction. For example, if you clock in at 8:00 and stop job ABC at 9:00, a start job transaction for job ABC will be generated at 8:00. Then, if you stop job XYZ at 11:00, a start job transaction for job XYZ will be generated at 9:00.

The **End Run Only** parameter must be selected for the End Run Only form to be used. This form is only available if the Time Track module in Infor Factory Track is implemented.

End Service Labor

Use this form to stop reporting labor hours for a service order.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

End Setup

Use this form to stop job setup activities.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

End Team Run

Use the End Team Run form to stop job operations for a team. You can report completed and moved quantities, scrap items, and assign lot and serial numbers when stopping job operations. To access the End Team Run form, you must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.

- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Generate Kanban Replenishment Orders

Use this form to create purchase and transfer orders to fill Kanban replenishment requests.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Job Material Issue

Use this form to issue material to jobs.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Job Material Return

Use this form to return materials from a job operation back into inventory.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Job Move

Use this form to move completed items from one operation to the next or from the last operation into inventory. Alternatively, you can return previously completed or moved items. You can also report items as completed on this form. You can perform these activities for standard, single-item jobs or for co-product jobs, which produce a mixed group of items.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Job Receipt

Use this form to receive completed items from jobs into inventory.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Job Routing Notes

Use this form to create and view notes for a job operation. You can access this form by selecting **Notes** on the Work Center form.

Job Status

Use this form to view the status of jobs at each operation. You can print status reports for job operations and launch the Visual Dispatch form from this form.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Join / Leave Team

Use this form to join or leave teams.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Just-In-Time Production

Use this form to receive completed items into inventory that are not associated with a job or production schedule. Alternatively, you can return previously completed Just-In-Time production items.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Kanban Item Locations

Use this form to create Kanbans and to define locations and replenishment cycle details for Kanban items. You can also use this form to print labels for Kanbans.

Kanban Items

Use this form to manage Kanban items. You can designate items in your ERP system as Kanban items and define a replenishment quantity and replenishment source.

Kanban JIT Replenishment

Use this form to fill Kanban replenishment requests using just-in-time production.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Kanban Label Printing

Use this form to print Kanban labels.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Kanban Locations

Use the Kanban Locations form to manage locations at which kanban items are used.

Kanban Pick List

Use this form to print pick lists for Kanban replenishment requests.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Kanban Receipt

Use this form to receive Kanban replenishment items from staging locations into Kanban locations.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Kanban Replenishment Requests

Use this form to request replenishment for Kanbans.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.

- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Kanban Replenishment Status

Use this form to view the status of Kanban replenishment requests. You can also delete replenishment requests using this form.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Kanban Setup

Use this form to specify Kanban prefixes.

Kanban Staged Items Report

Use this form to print a list of staged items for Kanban replenishment. You can use this list to assess which items are ready to be received at Kanban locations.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Kanban Staging

Use this form to move items from inventory to Kanban staging locations.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Kanban Warehouses

Use this form to manage Kanban warehouses. You can designate warehouses in your ERP system to be used for Kanban items and define a staging location for Kanban replenishment items.

Label Print Details

Use this form to view additional label record details and to re-print labels. You can access this form by selecting **Print Details** on the Label Reprint form. The **Label Print Details** tab displays this information for each label record:

- **Label Request ID**
- **Label Request Seq**: sequence of the label record on the request ID
- **Qty**
- **Location**
- **Cross Dock Location**
- **Cross Dock Order**
- **Item**
- **Lot**
- **Serial Number**
- **UM**: unit of measure
- **Warehouse**
- **Ref Order Type** : order type of the originally printed label; displayed if the label record is a reprint
- **Ref Order Number** : order number of the originally printed label; displayed if the label record is a reprint
- **Ref Order Line** : order line of the originally printed label; displayed if the label record is a reprint

The **Label Extensions** tab is not currently used.

Label Printing

Use this form to print barcode labels for items being moved to inventory.

Label Reprint

Use this form to re-print barcode labels for items.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Lot Attributes

Use this form to specify attributes for newly created lots. If the **Enter Lot Attributes** parameter on the Global Parameters form has a value of **Always** or **Ask**, the Lot Attributes form is opened when you create a new lot using one of these transactions:

- End Machine
- End Run
- End Team Run
- Just-In-Time Production
- Job Move
- Job Receipt
- Production Schedule Receipt
- Team Member Reporting
- Workset Maintenance

Missing Employee Information Required by Time Track Report

Because the Time Track module in Infor Factory Track requires additional employee information that is not required for the Shop Floor module, you may need to add employee information on the Employees form when implementing Time Track. You can use this form to generate a report that identifies what information is missing.

Production Schedule Receipt

Use this form to receive completed items from production schedules into inventory. Alternatively, you can return previously completed items from inventory.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Project Material Issue (Shop floor transaction)

Use the form to perform project material issue from shop floor module.

QCS Disposition

Use the QCS Disposition transaction to perform inventory disposition at an inspection location. As part of this transaction, you can transfer items to standard inventory locations, hold items at the inspection location, and destroy items.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

QCS Test Record

Use this form to generate quality tests and to record test results.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Quantity Enter

Use this form to report completed, moved, and scrapped quantities. You must access this form from the Workset Maintenance form or the Work Center form.

Resource Group Skills Management

Use this form to define skills requirements for labor type resource groups. If a job operation references a resource group, only employees who meet the defined skills requirements for that resource group will be able to work on that job operation.

Serial Number Assignment

Use this form to assign serial numbers to items being received, issued, or returned.

SRO Material

Use the SRO Material form to issue material to or recall material from service orders.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Start Indirect

Use this form to start indirect tasks. These are tasks that do not involve the completion of operation quantities; examples include facility maintenance and meetings. You can only have one indirect task running at a time.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Just-In-Time

Use this form to report time to Just-In-Time production orders.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Machine

Use the Start Machine form to start machine operations for a job.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Production Schedule

Use this form to report time to production schedules.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Project Labor

Use this form to start reporting labor hours for a project.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Run

Use this form to start job operations.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Service Labor

Use this form to start reporting labor hours for a service order.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Setup

Use the Start Setup form to start job setup activities. Setup activity is the initial tasks that need be completed for an operation before production work can begin.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Start Team Run

Use this form to start job operations for a team. To access the Start Team Run form, you must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Supervisor Labor Stop

Use this form to stop transactions, including transactions that started on another report date. For example, if an employee forgets to stop a transaction within a report date, you can use this form to stop that transaction. Only supervisors and administrators are authorized to use this form.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Team Maintenance

Use this form to manage teams using Shop Floor. You can create and delete teams and add and remove members. To access the Team Maintenance form, you must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group.

To create teams using the Time Track module in Infor Factory Track, use the Team Maintenance form. If you have both the Shop Floor and Time Track modules implemented, you must use the Team Maintenance form in Shop Floor to create teams. Teams created using Time Track are not compatible with Shop Floor.

Team Member Reporting

Use this form to report completed and moved quantities for a team. The quantities you report will be evenly distributed among all team members.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Visual Dispatch

Use this form to view detailed information about jobs, including the status of operations, material details, and related transactions. You can search for jobs by resource group or by job number.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Visual Serial Assignment

Use this form to assign serialized component material to a serialized end item.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Work Center

You can use this form to perform day-to-day labor activities for a work center including:

- starting job operations, indirect tasks, machine operations, setup activities, and service labor reporting
- stopping job operations, indirect tasks, machine operations, setup activities, and service labor reporting
- adding job operations, indirect tasks, and setup activities to worksets
- starting worksets
- stopping worksets

- reporting completed quantities
- viewing and adding job routing notes
- viewing documents

If the **Work Center Popup Enabled** parameter is selected, a separate form will open when you select an operation, task, or activity and select an action button, such as **Add Run** or **Start Indirect**. You can then perform the desired action on the newly opened form. For example, if you select an operation and tap **Add Run**, the Workset Maintenance form is opened, allowing you to add the operation to your workset using that form.

If the **Work Center Popup Enabled** parameter is cleared, most actions listed in the Tasks section or Workset section will be performed directly from the Work Center form. For example, if you select an operation and select **Add Run**, the operation is immediately added to your workset without opening any additional forms.

There are two different sets of buttons for this form: one for workset-enabled employees and one for non-workset-enabled employees. The appropriate button configuration will display depending on how your employee type is configured.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

This form is surrounded by a colored border called the work status indicator. This indicator tells employees and supervisors at a glance how well a work center is keeping up with the scheduled production progress for the current operation. For more information about the work status indicator, see "Work Center Efficiency Overview" on page 12.

Work Center Home Page Configuration

Use this form to configure the Work Center Navigation Home form. You must assigned to the **Administrator** permission group to access this form.

Work Center Material Issue

Use this form to issue material to work centers.

The user can view employee number and employee name on the forms.

- **Employee Number**: The number from the ERP that used to identify the employee.
- **Employee Name**: The name of the employee associated with the employee number that comes from the ERP.

Also, the form displays a green **submit** button. The submit button is only enabled when all of the required fields have been entered and pass basic validation.

Work Center Navigation Home

Use this form to navigate to other forms or perform actions, such as clocking out for breaks. All forms or actions that a typical employee needs to use on the shop floor are available from this central navigation form.

Work Center Status Parameters

Use this form to configure efficiency levels and refresh intervals for work centers. If you do not configure efficiency levels and refresh intervals for a work center, the generic values specified on the Transaction Set Maintenance form will be used for that work center.

Workset Maintenance

Use this form to manage worksets. Worksets allow employees who are workset eligible to have multiple jobs running at the same time.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Overview

1

This module includes topics that describe Infor Factory Track SL features and how to use the transactions and forms.

Accessing Shop Floor and Warehouse Mobility Transactions

You can access Shop Floor and Warehouse Mobility transactions using a Web browser. Use these URL paths to access the transactions for these two modules:

- **Shop Floor**:http://<utility servername>/wswebclient/default.aspx?page=formonly&form=ICSLWorkCenterNavigationHome.ts
- **Warehouse Mobility standard menu**: http://<utility server name>/wswebclient/Mobile.aspx?page=light&form=WMMenu.mobi
- **Warehouse Mobility icon-based menu**: http://<utilityservername>/WSWebClient/mobile.aspx?page=light&form=FTICONMenu.mobi

Note: You must update these URL paths with the name of your utility server.

If you are using Warehouse Mobility on a mobile scanner device, you must configure the device to point to one of the Warehouse Mobility menu paths: The standard menu is optimized for navigation using the directional keys on your device, while the icon-based menu is optimized for navigation using touch input.

The Shop Floor URL path opens the Work Center Navigation Home form from which employees can access and perform Shop Floor transactions using a touch screen or mouse.

Parameters Overview

2

Use the Infor Factory Track parameters forms to customize the application to meet the specific needs of your organization. There are two types of parameters forms:

- **Parameter definitions forms**: These forms are only used by programmers who are authorized to customize your application. They define what transaction parameter settings are available.
- **Parameter settings forms**: You can use these forms to configure the behavior of the application and its individual transactions.

Parameter Definitions Forms

Caution: Only programmers who are authorized to customize your application should use the parameter setup forms. Changes made to these forms can cause your application to function incorrectly.

The parameter setup forms are used to define what transactions and parameters are available to administrators using the parameter settings forms. The Global Parameters Setup form is used to define the parameters to be displayed and specified on the Global Parameters form, which affect all Infor Factory Track transactions and forms. The Transactions Setup form is used to determine what transactions are available in the application and to define the parameters used by each transaction. This form can be used to add custom transactions to your parameter management system.

Parameter Settings Forms

Use the parameter settings forms to configure the behavior of the application and its individual transactions. These parameter settings forms are available for the application:

- "Global Parameters": You can use this form to configure parameters that apply to all Infor Factory Track transactions and forms.
- "Transaction Set Maintenance": Use this form to configure parameters for individual transactions.
- "Transaction Warehouse Order Type Print Parameters": Use this form to configure label printing settings for specific transactions at the transaction or warehouse level.
- "User Extensions": Use this form to configure settings for individual users.
- "Warehouse Parameters": Use this form to configure parameters for warehouses

  Note: The parameter **Allow lot Change** is modified as **Allow location and lot change**. The **lot** field must follow the **location** field to get enabled or disabled for validation of the warehouse.

. You can also use this form to configure alternate transaction settings that only apply to a specified warehouse.

Label Printing Overview

Many transactions in Infor Factory Track support barcode label printing. You can print labels from Factory Track Mongoose forms, Shop Floor touch-screen forms, and mobile scanner transactions.

To view a list of transactions that support label printing, see "Label Printing Transactions List" on page 140.

To set up label printing, see "Setting Up Label Printing" on page 122.

You can view and re-print labels in Factory Track using the Label Print Summary form.

See "Using the Label Print Summary Form" on page 166.

To re-print labels using Shop Floor touch-screen forms and Warehouse Mobility mobile scanner transactions, see Re-printing Labels Using Shop Floor and Re-printing Labels Using Warehouse Mobility.

Setting Up Label Printing

1. Create label formats using the BarTender application. See the *Bartender for Infor Factory Track Configuration Guide* for more information.
2. Establish connections with the BarTender application using the Label Interface form.

   See "Configuring Label Printing Connections" on page 163.
3. Define label formats using the Label Formats form.

   See "Defining Label Formats" on page 166 for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form.

   See "Adding Additional Fields to Barcode Labels" for more information.
5. Configure printers using the Label Printer Configuration form.

   See "Configuring Printers" on page 165 for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form.

   See"Configuring Label Printing Settings for Transactions" on page 164 for more information.

Teams Overview

You can use teams to streamline employee activities. Team members can start or stop jobs for all members of their team in a single transaction. When a labor transaction is performed using the team number, that transaction is replicated for all members of the team. A supervisor can also perform activities on behalf of the team that will affect all of its members. For example, a supervisor can start a job for the team. All members of the team will then be assigned to the started job. Using teams reduces the number of transactions that need to be performed, thereby reducing the potential for employee errors, such as forgetting to start a job.

Note: Attendance transactions cannot be performed for a team. Employees must clock in and out individually.

You can create and manage teams using the Time Track or Shop Floor modules. Teams created using Time Track are not compatible with Shop Floor.

See "Using Teams in Shop Floor" on page 123.

See "Using Teams in Time Track" on page 123.

Using Teams in Shop Floor

To use teams in Shop Floor:

1. On the Team Maintenance form, create teams.
2. On the Team Maintenance form, assign employees to teams.
3. Use the team number instead of the employee number when performing labor transactions, such as starting or stopping jobs.

Using Teams in Time Track

To use teams in Time Track:

1. On the Teams form, create teams.
2. On the Teams form, assign employees to teams.
3. Use the team number instead of the employee number when performing labor transactions, such as starting or stopping jobs.

Factory Track Groups

These authorization groups are defined in Factory Track by default:

- **FT-Administrator**: Infor FactoryTrack Administrative Group. Administrators set up other user profiles and define their authorization level. Administrators have the highest level of access. They have full access to all forms. Administrators usually manage and maintain organization, configuration, and security parameters. Administrators can use the Administrator Home Page form to access the forms relevant to the administrator role.
- **FT-Supervisor**: Infor FactoryTrack Supervisor Group. Supervisors manage the labor and attendance data of employees. Line supervisors authorize exceptions, approve time sheets, schedule absences, and adjust shifts. Payroll supervisors process payroll data. Supervisors can use the Supervisor Home Page form to access the forms relevant to the supervisor role. They use the Hours Summary form to view an overview of the labor and attendance data of their employees. Supervisors are usually allowed to view organization and configuration forms but not given any editing privileges on these forms.
- **FT-User**: Infor FactoryTrack User Group. Users report labor and attendance data for themselves. Examples include starting a job they are about to work on or clocking out at the end of the work day. Users have access to a limited number of forms that are directly related to these activities. Users are usually allowed to view, but not edit, their own records on the Hours Summary and Hours Detail forms. Users can use the Dashboard Transactions form or Work Center Navigation Home form to enter attendance or labor transactions. These user privileges are controlled by parameter settings in the employee record.
- **FT-TeamLeader**: Infor FactoryTrack Team Leader Group. Team leaders manage teams using the Shop Floor module. They are authorized to create teams and to add and remove team members. Team leaders can perform transactions on behalf of their entire team.
- **FT-TTHomePage**: Infor FactoryTrack Home Page Group for Time Track. The TTHomePage group uses a user profile to access the Employee Home Page and its sub-forms in Time Track. You should not assign the user profile attached to the TTHomePage group to an employee record. Use this profile to start Factory Track and leave it open on a general purpose PC on the shop floor. Multiple users can then perform labor and attendance transactions without having to log into and out of Factory Track.
- **FT-WMBase**: Infor FactoryTrack WM Base Group for Device Interface - all ERPs. The WMBase group is authorized to use basic mobile scanner transactions, such as changing a default printer, and run pop-up windows in the Warehouse Mobility module. All Warehouse Mobility mobile scanner users should be assigned to this group.
- **FT-SLWMGETIT**: Infor FactoryTrack WM GET IT SyteLine Group. The WMGETIT group is authorized to use mobile scanner transactions in the Get It module of Warehouse Mobility, including receiving and put away transactions. Users in this group are not authorized to adjust transaction parameters.
- **FT-SLWMMAKEIT**: Infor FactoryTrack WM MAKE IT SyteLine Group for Device Interface. The WMMAKEIT group is authorized to use mobile scanner transactions in the Make It module of Warehouse Mobility, including material issue and labor reporting transactions. This group is also authorized to use the Time Track mobile scanner transactions. Users in this group are not authorized to adjust transaction parameters.
- **FT-SLWMMOVEIT**: Infor FactoryTrack WM MOVE IT SyteLine Group for Device Interface. The WMMOVEIT group is authorized to use mobile scanner transactions in the Move It module of Warehouse Mobility, including inventory move and inventory inquiry transactions. Users in this group are not authorized to adjust transaction parameters.
- **FT-SLWMSHIPIT**: Infor FactoryTrack WM SHIP IT SyteLine Group for Device Interface. The WMSHIPIT group is authorized to use mobile scanner transactions in the Ship It module of Warehouse

Mobility, including picking and shipping transactions. Users in this group are not authorized to adjust transaction parameters.

- **FT-SLWMNonTT**: Infor FactoryTrack SyteLine Warehouse Mobility Non Time Track Group. This group is used for WM (scanner) transactions in CSI (SyteLine) implementations to control access to the Clock-in, Clock-out, Lunch-in, Lunch-out. You would only assign this group when the CSI (SyteLine) Time and Attendance module is implemented (do not assign if implementing Time Track).
- **FT-TTWMTrans**: Infor FactoryTrack Time Track WM Transactions - SyteLine & LN. This group is used for WM (Scanner) Transactions when Time Track is being implemented.
- **Infor-SystemAdministrator**: This group is used to add users to Factory Track through the Ming.le interface.

Factory Track License Modules

Available Factory Track license modules and their access capabilities are listed here:

- **FactoryTrackAuto**: Used for IDO Access
- **FactoryTrackBase**: Allows access to administrative Factory Track forms including standard Mongoose forms
- **FactoryTrackCloud**: Cloud license that allows access to all forms that are not development forms
- **FactoryTrackDev**: Allows access to IDO editing forms, SQL Table/Column editing forms, and Factory Track development forms
- **FactoryTrackShopFloorTrans**: Allows access to forms that are exclusively Shop Floor forms
- **FactoryTrackShopFloorTTTrans**: Allows access to Shop Floor forms that are used with Time Track
- **FactoryTrackTimeEntry**: Allows access to Time Track time sheet forms
- **FactoryTrackTTTrans**: Allows access to forms that are exclusively Time Track forms
- **FactoryTrackWMTrans**: Allows access to forms that are exclusively Warehouse Mobility forms
- **FactoryTrackWMTTTrans**: Allows access to all Warehouse Mobility forms that are used with Time Track

Configuring Global Parameters

Use the Global Parameters form to configure parameters that apply to all Infor Factory Track Shop Floor transactions and forms.

1. Open the Global Parameters form.
2. Specify this information:

   Auto Open Work Center Form when Job active
   Select this check box to access the work center form when an active job is related.

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Allow Multiuse of Resource
When this check box is set to yes, multiplue jobs can run on the same resource at the same time. When this check box is set to No, only one job is allowed to run on a resource at a time.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued

Note: If the check box is selected, the logic must check the Syteline parameter.

Allow Transactions If Cycle Count Record Exists
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Combine Labor and Quantity
Select this check box to use the combination of labor and quantity in transactions..

Containers In Use
Select this check box to use containers.

Display Resource ID
Select this check box to display the resource ID field on Shop Floor transaction forms. Time Track transaction forms use this parameter as well.

Allow Job Resources Only
When Display Resource ID is set to Yes, select this check box to display the list of job resources defined for the job. When this is cleared, all valid resources are displayed. Time Track transaction forms also uses this parameter.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Enter Lot Attributes
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify **3**, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

PIN Required
Select this check box to require employees to specify a PIN number when signing in as a generic user.

Process Labor
Select this check box to process labor for the selected ERP.

Infor CloudSuite Industrial Time and Attendance implemented
Select this check box to enable the Time and Attendance module for Infor CloudSuite Industrial .

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as your lot number.

TT module is implemented
Select this check box to enable the Time Track module.

> **Caution:** The **Time Track Implemented** parameter significantly changes the way your application operates. You should only select this parameter when you are implementing the Time Track module. Selecting or clearing this parameter under other circumstances may cause your application to behave unpredictably or incorrectly.

3 Click **Save**.

Creating and Modifying Global Parameters

Use the Global Parameters Setup form to create and modify parameter options that will affect all Infor Factory Track transactions. Administrators can configure these parameters on the Global Parameters form to customize the application.

> **Caution:** Only programmers who are authorized to customize your application should use the Global Parameters Setup form. Changes made to this form can cause your application to function incorrectly.

1. Open the Global Parameters Setup form.
2. If you are creating a new parameter, click **New** or select a blank line on the grid. If you are modifying an existing parameter, select it from the grid.
3. Specify or review this information:

ERP Type
Select the ERP to which this parameter applies. If you are modifying an existing parameter, this field is unavailable.

Global Param Name
Specify a name for the parameter. If you are modifying an existing parameter, this field is unavailable.

Global Param Type
Select a parameter type: **String**, **Boolean**, or **Numeric**.

Global Param Value
Optionally, specify a default value for this field. Leave blank to require users to specify the value.

Description
Specify a description for the parameter.

End User Description
Optionally, specify a description to use for end users.

Parameter Parent
Optionally, specify a parent parameter. A parameter is only visible if its parent parameter is enabled.

Parameter Sequence
Optionally, specify a sequence number to determine where this parameter should be displayed in the parameter list. If you do not specify sequence numbers for parameters, they are displayed alphabetically.

4. Click **Save**.

Configuring Site Parameters

1. Open the Site Parameters form.
2. Specify this information:

   Site
   Specify the appropriate site. The site name and description are displayed. If you need to create a new site, open the Sites form.

   ERP Type
   Specify the appropriate ERP type.

3. To generate form component views, click **Generate Strings View**, **Generate Component View**, and **Generate Menus View**.
4. On the **Calendar Setup** tab, select a start date for the site calendar and specify a tracking year.
   a. Click **Site Holidays** to edit holidays.
   b. Click **Site Calendar** to view a 12 month array of the site calendar.
   c. Configure Work Week Start Day. Specify this information:

1st Day of Work Week
Set the day of the week that must be considered as the first day of the work week. By default, this value is set to Monday.

Note: For Daily Elapsed Employees and Clocked hours employees, this day is considered as the start day of the work week for the selection criteria on the Hours Summary and Daily Elapsed Summary forms. This day is also considered for Weekly Elapsed employees' hours processing. Weekly Elapsed employees must be assigned to Payroll Schedules that have period start dates that correspond with the Site's 1st Day of the Work Week setting.

Work Week Effective Date
Specify the date from which the change in the first day of the work week, is effective. All the weekly selection criteria for report dates equal to and after this date use the corresponding 1st Day of Work Week to display the records. Queries on report dates, prior to the Work Week Effective Date use the 1st Day of Work Week corresponding to the effective date, for the display of records. If there is no Work Week Effective date that corresponds to the report dates in the query, the default 1st Day of the Work Week is considered for the display of records.

Note: For Weekly Elapsed Employees in addition to use in selection queries, this parameter is considered as the work week start date for the selection criteria on the Hours Summary and Weekly Elapsed Summary forms

Generate work week
Click Generate work week to modify the 1st Day of Work Week setting. If a Work Week Effective Date is specified, report dates prior to the effective date use the default 1st Day of Work Week or the 1st day that corresponds to the 1st day defined for the period, prior to this change.

Note:

- For Weekly Elapsed Employees, effective dates should be set to the current calendar date or to a future date.
- Elapsed Detail records for weekly employees on report dates prior to the effective date of the work week change or that have create dates that are prior to the work week change, create date cannot be reset. The Generate Work Week utility resets records to the new Work Week Start for Weekly Elapsed Time employees with Elapsed Detail records for future dates (ie, planned absences or holiday abs records).
- Contact Infor Support to review your data structure prior to generating a new work week start day.

5 On the **Infor Cloud suite industrial Communication** tab, specify this information:

User Name
Specify Syteline automation user to be used to communicate with Syteline for transaction postings and validations

Password
Specify the password for the user name.

Configuration Name
Specify the Syteline configuration.

URL
Specify the SyteLine Runtime URL to connect to Factory Track. Specify the SyteLine utility server name and retain the remainder of the path (/IDORequestService/RequestService.aspx). Also, in the response_file_path tags, specify the Factory Track utility server name and retain the remainder of the path (/Response).

6 In the SyteLine Data Views section, specify this information:

Server
Specify Syteline database server name.

Database
Specify Syteline application data base name. After updating right server and the database information click **Test connection** button, to populate data for the **version** field.

Site
Select the right Syteline site using site combo box look up.

7 To verify your connection to SyteLine, click **Test Connection**. If the test is successful, click **Generate** to generate data views.

8 On the **Time track** tab, the add the following information:

Payroll Code
Optionally, specify a payroll code. Payroll codes identify each record as originating from a particular site.

ERP Code
Specify an ERP code. Typically, a site code for Infor Factory Track is specified in the underlying ERP software. The ERP code specified on the Site Parameters form must match the Infor Factory Track site code specified in the ERP.

ERP Shift
Specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Allow Offset Posting
Select this check box to automatically zero out frozen posts by posting an offsetting negative value; for example, a frozen post of 4 hours will be offset by a post of -4 hours. Clear this check box to display an ERP error in response to frozen posts.

Allow Repost
Select this check box to allow edited transactions to repost to the ERP system. Clear this check box to display an ERP error in response to reposted transactions.

Use Global Posting
Select this check box to specify how to prevent posting of records sharing a specific employee number and report date combination when one or more records contains an error. For example, an employee posts a group of four records in which the third record contains an error. Select **Use Global Posting** to block posting of all four records. Clear this check box to post records 1, 2, and 4, and to block only record 3.

Post Start End Times to ERP
Select this check box to report shift start and end times to ERP even when those times occur on separate days. Clear this field to always report shift start and end times on the same day in accordance with the configuration settings of the shift.

Allow Revert Processed Payroll
Select this checkbox to allow users to revert payroll from Processed to Submitted.

Note:

- If the checkbox is selected and the user has the work group privilege **Revert Payroll** set to Yes, users can use the revert icon on the Payroll Summary and Payroll Detail forms to revert payroll from Processed to Submitted. When the user's work group privilege **Revert Payroll** is set to No the revert icon is set to active but if the user invokes it they will be hard stopped with a message advising the user is not authorized to revert payroll.
- If the checkbox is cleared, the revert Icon for both the Payroll Summary and Payroll Detail forms is deactivated. The feature is turned off for all users regardless of the Work Group privilege setting.

Allow Attendance Transactions On Future Date
If this check box is selected, future transaction dates and times can be used when entering attendance or labor transactions. If the check box is cleared, only current or past transaction dates and times can be used.

Note: The parameter does not restrict entry of planned absences or future absence requests.

9. On the **Colors** tab, click **Colors** to select a color format to denote holidays. Specify a foreground (text) color and a background color and view the result in the **Sample** field. When finished, click **Save and Exit**.

Defining a Factory track User Role

1. Open the User Extensions form.
2. Select a user record.
3. In the **User Type** field, select **Administrator**, **Supervisor**, or **User**. The type you specify will assign the selected user to a group authorization that allows access to forms appropriate to that type.
   - Administrators can access and update all forms.
   - Supervisors can view most forms, and can enter and edit employee times but will not be able to edit configuration and organization tables.
   - Users can enter transaction information in real time but will not be able to edit records or modify transaction times.

Defining Data Domains

Use the Data Domains form to define data domains.

Caution: Only programmers who are authorized to customize your application should use the Data Domains form. Changes made to this form can cause your application to function incorrectly.

1 To modify an existing data domain, select it from the grid. To create a new data domain, select a blank line from the grid.
2 Specify this information:

ERP Type
Select the ERP type.

Data Domain
Specify the name of the domain to which this entry applies.

Data Type
Select a data type:

- **String**
- **Date**
- **Time**
- **Date-Time**
- **Boolean**
- **Integer**
- **Decimal**

Data Size
Specify a length for the string or integer.

Digits Before Decimal
Specify the number of digits that appear before the decimal.

Digits After Decimal
Specify the number of digits that appear after the decimal.

Auto Expand
Select this check box if the input needs to be expanded to fit the field definition.

Convert to Uppercase
Select this check box to convert the string to uppercase.

3 Click **Save**.

Configuring User Parameters

Use the User Extensions form to configure settings for individual users.

1 Open the User Extensions form.
2 To configure parameters for an existing user, select a user ID from the grid. To configure parameters for a new user, select a blank line from the grid and specify a user name in the **User Name** field.
3 Specify or review this information:

User Type
Select a user type to indicate which forms the user can access.

Employee
The code or ID of the employee. This ID is also used to identity the employee number of the user on the shop floor. If the ID is not linked to an employee, the shop floor considers the employee as a generic user.

Employee name
The Employee name.

Warehouse
Specify a default warehouse for this user. If the **Trans Fill Whse** parameter is selected on the Transaction Set Maintenance form, this warehouse will be used by default instead of the default warehouse specified for the transaction.

Pick Location
Specify a default pick location for this user.

User Initials
Specify the user initials. These initials are used by the application to identify a user who performs transactions. This is a mandatory field.

PLM User Name
If applicable, specify a PLM User Name.

Work Center
Specify a work center for this user. Shop floor considers this as the default work center.

Label Printer
Specify a default printer for this user. If the **User Printer Override** parameter is cleared on the Transaction Warehouse Order Type Print Parameters form, this printer will be used instead of the printer specified for the transaction.

ERP Document Printer
Specify the default printer that must be used for to print ERP documents. For example, shipping documents.

Note: User cannot verify the contents of this field, so the data(as defined by the ERP) must be entered the correctly in this field.

User Can Change Clock
Select this check box to allow the user to change the time and date recorded for the transactions they perform.

> **Caution:** This parameter allows users to change the time record for transactions, including time and attendance and job start and stop transactions. You should only select this parameter for managers or similar personnel.

Default Inventory Location
Specify a default inventory location for this user.

Default Picking Location
Specify a default picking location for this user.

Default Putaway Location
Specify a default put away location for this user.

4 Click **Save**.

Creating and Modifying User Parameters

Use the User Parameters form to create and modify parameter options for specific users. Administrators can configure these parameters on the User Extensions form to customize user permissions and settings.

> **Caution:** Only programmers who are authorized to customize your Infor Factory Track application should use the User Parameters form. Changes made to this form can cause your application to function incorrectly.

1 Open the User Parameters form.
2 If you are creating a new parameter, click **New** or select a blank line on the grid. If you are modifying an existing parameter, select it from the grid.
3 Specify or review this information:

ERP Type
Specify the ERP type to which this parameter applies. If you are modifying an existing parameter, this field is unavailable.

Parameter Name
Specify a name for the parameter. If you are modifying an existing parameter, this field is unavailable.

Parameter Type
Select a parameter type: **String**, **Boolean**, or **Numeric**.

Parameter Value
Optionally, specify a default value for this field. Leave blank to require users to specify the value.

Description
Specify a description for the parameter.

End User Description
Optionally, specify a description to use for end users.

Parameter Parent
Optionally, specify a parent parameter. A parameter is only visible if its parent parameter is enabled.

Parameter Sequence
Optionally, specify a sequence number to determine where this parameter should be displayed in the parameter list. If you do not specify sequence numbers for parameters, they are displayed alphabetically.

4 Click **Save**.

Configuring Warehouse Parameters

Use the Warehouse Parameters form to configure parameters for warehouses. You can also use this form to configure alternate transaction settings that only apply to a specified warehouse.

See "Configuring Warehouse-Specific Transaction Settings" on page 136.

1 Open the Warehouse Parameters form.
2 Select a warehouse from the grid.
3 On the **Parameter** tab, specify this information:

Purchase Receipt Location
Specify a default receiving location for purchase orders.

Transfer Receipt Location
Specify a default receiving location for transfer orders.

Transfer Pick Location
Specify a default staging location for transfer orders.

Transfer Ship Location
Specify a default shipping location for transfer orders.

Sales Pick Location
Specify a default staging location for sales orders.

Return Location
Specify a default location from which to issue returns.

PPS Pick Loc
If you are using the Pick, Pack, and Ship module in ERP SyteLine, specify a default picking location. Leave blank to use the default location defined in your ERP system.

Production Receipt Loc
Specify a default receiving location for production orders.

Purchase Putaway Location
Specify a default putaway location for purchase orders.

Transfer Putaway Location
Specify a default putaway location for transfer orders.

Transfer Pack Location
Specify a default packing location for transfer orders.

Transit Location
Specify a default transit location for transfer orders for this warehouse. Leave blank to use the default transit location defined in your ERP system.

Sales Pack Location
Specify a default packing location for sales orders.

Rma Receipt Location
Specify a default receiving location for RMA items.

PPS Pack Loc
If you are using the Pick, Pack, and Ship module in ERP SyteLine, specify a default packing location. Leave blank to use the default location defined in your ERP system.

User Location Used
Select to use the picking location assigned to the user account of the user instead of the default pick location for the warehouse.

4. Click **Save**.

Configuring Warehouse-Specific Transaction Settings

Use the Warehouse Parameters form to configure alternate transaction settings that only apply to this warehouse. For transactions performed in this warehouse, these settings will override the settings on the Transaction Set Maintenance form.

1. Open the Warehouse Parameters form.
2. To configure parameters for an existing warehouse, select it from the **Whse** grid column. To configure parameters for a new warehouse, select an empty line from the **Whse** grid column and specify a warehouse code and description in the Warehouse fields.
3. On the **Transactions** tab, select all transactions that will have parameter values specific to this warehouse. Any transactions that have the Warehouse Specific check box selected are already using warehouse-specific parameters.
4. To copy the general transaction parameter values currently configured for the transaction on the Transaction Set Maintenance form, select **Copy From Template**.

   A separate copy of these transaction values will be created for the warehouse. These copied parameter values are only the initial values used for the warehouse, you can change them as needed for the warehouse. The warehouse-specific copy of these parameters will no longer be linked to the general transaction parameter values, so any changes you make to the warehouse-specific parameter values will not affect the general transaction parameter values and vice versa.
5. To copy parameter values from another warehouse instead of the general transaction parameter values, clear the **Copy from Template** box and, in the **From** field, select the warehouse from which you are copying values.

6 To use warehouse-specific parameters for this warehouse for all selected transactions, select **Copy Selected Transactions to Warehouse**. Optionally, to use warehouse-specific parameters for this warehouse for all transactions, select **Copy All Transactions to Warehouse**.
7 Click **Save**.
8 To configure warehouse-specific parameter values for a specific transaction, select the transaction and select **Specific Parameter Settings**. The Transaction Set Maintenance form is displayed.
9 Configure warehouse-specific parameter values for this transaction. The warehouse for which you are configuring parameters is displayed in the **Warehouse** field, indicating that any changes you make to the parameter values on this form will only apply to that warehouse.

   For more information about how to configure individual parameters on this form, see "Transaction Set Maintenance".

10 Optionally, to configure label printing parameters for this transaction that are specific to this warehouse, select **Label Print Parameters**. The **Transaction Warehouse Order Type Print Parameters** form is displayed. Configure the parameters on this form as desired and save your changes.

   See "Configuring Label Printing Settings for Transactions" on page 164.

11 Click **Save**.

Configuring Tasks

1 Open the Tasks form.
2 Specify this information:

Task Code
Specify a task code to define how the hours performing the underlying task will be identified in Factory Track. This is a required field.

Description
Specify a description of the activity represented by the task code.

Post to ERP
Select to post the time spent performing the task to the underlying ERP.

ERP Task Code
Specify the code to which the hours spent on the task are posted in the ERP. This must be a valid and active code in the underlying ERP for hours related to this task to post successfully. If the **Post to ERP** option is cleared, this field is unavailable.

Paid
Select to categorize the hours associated with this task as paid in payroll. If you clear this option, hours associated with this task will categorize as unpaid. This option is selected by default.

Active
Select to activate this task, allowing users to book hours to it. If you clear this option, users will receive a hard stop if they attempt to book time to this task.

General Task
Select to designate this task as a general task instead of an indirect task. General tasks are linked to an order or project. Hours that are reported for a general task will be reported to the order or project linked to that task rather than under the task code. General tasks can only be performed by employees who are configured to use elapsed time.

3 If you selected the **General Task** check box, specify this information in the General Task section to link an order or project to the task:

Note: The General Task section and related fields are only displayed if the **General Task** check box is selected.

Facility
Specify a facility.

Order Type
Specify an order type.

Order Number or Project Number
Specify an order number or project number, depending upon the selected order type.

Suffix
This field is only displayed if the order type is **Production Order**, **Service Order**, or **Setup**. Specify an order suffix.

Operation
This field is only displayed if the order type is **Production Order**, **Service Order**, or **Setup**. Specify an operation.

Task Code
If applicable, the task code is displayed.

Work Center
If applicable, the work center is displayed.

Item
If applicable, the item is displayed.

Machine
If applicable, the machine is displayed.

4 Click **Save**.

Transaction processing

3

This chapter describes the transactions processes related to Factory Track SL.

Assigning Actions to Function Keys

Use the Function Key Action Values form to assign actions to the function keys on the mobile scanner devices at your site.

1 Open the Function Key Action Values form. The device type is displayed.
2 Specify a key value from your scanner and a key description for each of these actions:
    - **Go To Previous Page**
    - **Go To Main Menu**
    - **Go To Help**: Currently, this action has no effect; this version of Infor Factory Track does not support opening help files from a mobile scanner device
    - **Reprint**
    - **Logout**
    - **Submit Form**
    - **Move Up In List**
    - **Move Down In List**
    - **Select Current From List**
    - **Refresh List**
    - **Run Popup Form**: opens a list of options from which to select for the current field; this action is only supported for certain fields
    - **Special Value1**: if applicable, performs an action associated with customizations made to your site
    - **Special Value2**: if applicable, performs an action associated with customizations made to your site
    - **Special Value3**: if applicable, performs an action associated with customizations made to your site
3 To assign actions to the specified key values, click **Set**.

Label Printing Transactions List

The transactions that support barcode label printing are listed. Click a transaction to view which information is included on its labels.

This is the information that is included on the labels for each transaction:

Build Container

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Crossdocking

The information included on labels for this transaction depends upon which type of requirement is being met by the cross dock.

When cross docking to a customer order, the same label information is used as for the "Stock Move" on page 160 transaction.

When cross docking to a job, the same label information is used as for the "Job Material Issue" on page 146 transaction.

When cross docking to a Kanban request, the same label information is used as for the "Kanban Receipt" on page 149 transaction.

When cross docking to a service order, the same label information is used as for the "SRO Material" on page 159 transaction.

When cross docking to a transfer order, the same label information is used as for the "Stock Move" on page 160 transaction.

Customer Order Picking

Carrier Name

Carrier Pkg

Cust Vendor

Cust Vendor Item

Description

Global Trade Item Number

Gs1 Company Code

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Order Line

Order Number

Order Release

Order Type

Order UM

Qty

Revision (optional)

Serial Number (optional)

Serial Shipping Container Code

Ship Via Description

Site

Trans Name

UM

User ID

Whse

Customer Order Shipping

Carrier Name

Carrier Pkg

Cust Vendor

Cust Vendor Item

Description

Global Trade Item Number

Gs1 Company Code

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Order Line

Order Number

Order Release

Order Type

Order UM

Qty

Revision (optional)

Serial Number (optional)

Serial Shipping Container Code

Ship Via Description

Site

Trans Name

UM

User ID

Whse

JIT Production

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Type

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Job Booking

Note: Labels can only be printed for this transaction when a quantity is reported for a job.

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Job Labor Reporting

Note: Labels can only be printed for this transaction when a quantity is reported for a job.

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Job Material Issue

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Job Material Return

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Job Material UnIssue

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Job Receipt

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Kanban Receipt

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Production Line

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Ref Request ID

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Miscellaneous Issue

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Miscellaneous Receipt

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Multi-Site Move

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

PPS Packing

Carrier Name

Carrier Pkg

Cust Vendor (optional)

Cust Vendor Item (optional)

Description

Expiry Date (optional)

Global Trade Item Number

Gs1 Company Code

Item

Label Name

Label Request ID

Label Request Seq

Lot (optional)

Num Copies

Order Line

Order Number

Order Release

Order Type

Order UM (optional)

Qty

Revision (optional)

Serial Number (optional)

Serial Shipping Container Code

Shipment

Shipment Pkg

Ship Via Description

Site

Trans Name

UM

User ID

Weight (optional)

Whse

PPS Picking

Cust Vendor

Cust Vendor Item

Description

Expiry Date (optional)

Global Trade Item Number

Gs1 Company Code

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Order Line

Order Number

Order Release

Order Type

Order UM

Qty

Revision (optional)

Serial Number (optional)

Serial Shipping Container Code

Shipment

Site

Trans Name

UM

User ID

Whse

PPS Shipping

Cust Vendor

Global Trade Item Number

Gs1 Company Code

Label Name

Label Request ID

Label Request Seq

Location

Num Copies

Order Type

Serial Shipping Container Code

Shipment

Site

Trans Name

User ID

Whse

Production Schedule Reporting

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Purchase Order Receipt

Carrier Name

Carrier Pkg

Container Num (optional)

Cust Vendor

Cust Vendor Item

Description

Expiry Date (optional)

Global Trade Item Number (optional)

Gs1 Company Code (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Release

Order Type

Order UM

Production Line

Qty

Receipt Num

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Ref Request ID (optional)

Revision (optional)

Serial Number (optional)

Serial Shipping Container Code (optional)

Ship Via Description

Shipment Pkg

Site

Trans Name

UM

User ID

Weight (optional)

Whse

Putaway

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

QCS Disposition

If you are issuing items, this information is included on the label:

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

If you are moving items, this information is included on the label:

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Quantity Adjustments

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

SRO Material

Cust Vendor

Cust Vendor Item (optional)

Description

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Release

Order Type

Order UM

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Stock Move

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Production Line

Qty

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Transfer Order Receipt

Carrier Pkg

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Order UM

Qty

Receipt Num

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Ref Request ID (optional)

Revision (optional)

Serial Number (optional)

Ship Via Decription

Site

Trans Name

UM

User ID

Weight

Whse

Transfer Order Shipping

Carrier Name

Carrier Pkg

Description

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Num Copies

Order Line

Order Number

Order Type

Order UM

Qty

Revision (optional)

Serial Number (optional)

Ship Via Description

Site

Trans Name

UM

User ID

Whse

WIP Move

Container Num (optional)

Description

Expiry Date (optional)

Item

Label Name

Label Request ID

Label Request Seq

Location

Lot (optional)

Mfg Date (optional)

Num Copies

Order Line

Order Number

Order Type

Qty

Ref Order Line (optional)

Ref Order Num (optional)

Ref Order Release (optional)

Ref Order Type (optional)

Revision (optional)

Serial Number (optional)

Site

Trans Name

UM

User ID

Whse

Configuring Label Printing Connections

Use the Label Interface form to establish connections with the label printing software. There is only one record available on this form. This record contains connection information that allows Infor Factory Track to communicate with the BarTender label printing software.

1 Open the Label Interface form.
2 Specify this information:

Interface Type
If you are running Factory Track in the cloud, select **Database Only**. If you are running Factory Track locally, select **File**.

File Path
Specify where Factory Track should create the data files needed to generate barcode labels. The BarTender label printing software converts this data into actual files.

Field Separator
Specify a field separator to use for data files.

Label Template Path
Specify the file path location of the label templates. If you are running Factory Track in the cloud, this location must be on the same server as the Cloud Printing Utility.

3 Click **Save**.

Configuring Label Printing Settings for Transactions

Use the Transaction Warehouse Order Type Print Parameters form to configure label printing settings for transactions.

1 Open the Transaction Warehouse Order Type Print Parameters form.
2 Select a transaction from the grid.
3 Specify or review this information:

Transaction Name
The transaction name is displayed.

Warehouse
Optionally, to configure specific settings for a warehouse, specify a warehouse.

Print Labels
Select this check box to print labels for this transaction, warehouse, and order type.

Label Name
Select a label name. This field is only available if the **Print Labels** check box is selected.

Number of Labels
Specify the number of labels to print. This field is only available if the **Print Labels** check box is selected.

Default Printer
Select a default printer from which to print. This field is only available if the **Print Labels** check box is selected.

Quiet Mode
Select this check box to automatically print labels without opening the Label Printing form. This field is only available if the **Print Labels** check box is selected.

Is Label Printed for Item in Container
Select this check box to print labels for items in containers. This field is only available if the **Print Labels** check box is selected.

Override User Printer
Select this check box to always use the default printer instead of the printer assigned to the user's account. This field is only available if the **Print Labels** check box is selected.

Print Container Label
Select the check box to print container labels for this transaction, warehouse, and order type.

Is Label printer for Item in Container
Select this check box to enable item label printing for each transaction that involves a container. This field is only available if the **Print Container Label** check box is selected.

Label Name
Select a label name for the container. This field is only available if the **Print Container Label** check box is selected. This is a mandatory field.

Printer Name
Select a printer to print the container labels. This field is only available if the **Print Container Label** check box is selected.

Physical Location
Specify the physical location of the printer. This field is only available if the **Print Container Label** check box is selected.

Number of Labels
The number of container labels that must be printed. This value is defaulted. This field is only available if the **Print Container Label** check box is selected.

4 Click **Save**.

Note: The Transaction Warehouse Order Type Print Parameters form (for LN) has two additional container (HU – Handling Unit) level to configure. The other two sets of fields (Middle Level and Top Level) are displayed in the LN form only.

Configuring Printers

Use the Label Printer Configuration form to configure printers.

1 Open the Label Printer Configuration form.
2 To create a new printer, click **New**. To configure an existing printer, select it from the grid.
3 Specify or review this information:

Printer Name
Specify a name for the printer. If you are configuring an existing printer, this field is read only.

Physical Location
Specify the physical location of the printer. For example, **Receiving Dock**.

Printer Path
Specify the network path for the printer.

Mobile Printer
Select this check box if the printer is mobile.

4 Click **Save**.

Defining Label Formats

Use the Label Formats form to define label formats.

1 Open the Label Formats form.
2 To define a new label format, click **New**. To modify an existing label format, select it from the grid.
3 Specify this information:

Label Name
Specify a name for the label. This name must match the label format file name used in the Bartender application.

Description
Optionally, specify a description for the label.

Label Size
Optionally, specify a size for the label.

4 Click **Save**.

Using the Label Print Summary Form

Use the Label Print Summary form to view printed label records. You can also re-print labels on this form.

See "Viewing Printed Label Records" on page 166.

See "Re-printing Labels" on page 167.

Viewing Printed Label Records

1 Open the Label Print Summary form.
2 To define label search criteria, specify some or all of this information:

Transaction Name
Select the transaction for which the label was originally printed.

User ID
Specify the user ID of the person who originally printed the label.

Request ID
To search for a label by its request ID, specify a starting and ending request ID. A request ID is recorded for each label that is printed.

Create Date
To search for a label by the date it was created, specify a starting and ending date.

3 Click the **Search** button. The label request IDs that match the search criteria specified above are listed in the grid.
4 To view additional details for each label printed for a label request ID, right-click the request ID and select **Details**. The Label Print Details form is displayed.
5 Optionally, to view additional fields printed on the label that have been added by your organization, click the **Label Extensions** tab.

Re-printing Labels

1 Open the Label Print Summary form.
2 To define label search criteria, specify some or all of this information:

Transaction Name
Select the transaction for which the label was originally printed.

User ID
Specify the user ID of the person who originally printed the label.

Request ID
To search for a label by its request ID, specify a starting and ending request ID. A request ID is recorded for each label that is printed.

Create Date
To search for a label by the date it was created, specify a starting and ending date.

3 Click **Search**. The label request IDs that match the search criteria specified above are listed in the grid.
4 Optionally, to re-print a label request ID, select it from the grid and click **Reprint**. All labels associated with that label request ID are printed.
5 Optionally, to print an individual label on a label request ID, right-click the request ID and select **Details**. The Label Print Details form is displayed. On this form, select a label and click **Print**. The label is printed.

Defining Transactions

Use the Transactions Setup form to define transactions for the Infor Factory Track application. For example, you can add custom transactions to the application using this form. You can also configure settings for transactions on this form.

Caution: Only programmers who are authorized to customize your Infor Factory Track application should use the Transaction Setup form. Changes made to this form can cause your application to function incorrectly.

1 Open the Transactions Setup form.
2 To add a new transaction, click **Create a New Object** or select a blank line from the grid. To modify an existing transaction, select it from the grid.
3 Specify or review this information:

ERP Type
Select the ERP to which this parameter applies. If you are modifying an existing parameter, this field is unavailable.

Transaction Name
Specify a name for this transaction. If you are modifying a core transaction that is pre-installed with the application, this field is read only.

Transaction Form Name
Select the form name associated with the transaction.

Transaction Description
Specify a string and description for this transaction. The description will be visible to end users and may be translated into another language. There are separate fields for the string and the description.

4 Optionally, to configure settings for this transaction, specify this information:

Trans Fill Whse
Select this check box to use the warehouse assigned to the user as the default warehouse. The user can change this value.

Show Success Message
Select this check box to show a success message when the transaction is successfully completed.

Applies To Order Types
Select this check box if there are specific order types that apply to this transaction.

Supports Label Printing
Select this check box if the transaction supports label printing.

Order Type Group
This field does not apply to SyteLine integrations.

Default Order Type
This field does not apply to SyteLine integrations.

5 Optionally, to configure label printing parameters for the selected transaction, click **Label Print Parameters**.

For more information about how to configure label printing parameters, see "Configuring Label Printing Settings for Transactions" on page 164.

6 On the **Transaction Parameters** tab, select a parameter or, to create a new parameter, select a blank line on the grid.

7 Specify or review this information for each parameter you are modifying or creating on the **Transaction Parameters** tab:

   Note: The Order Type Parameters, Order Types, Profiles, and Profile Parms tabs do not apply to SyteLine integrations and are unavailable.

   Parameter Name
   Specify a name for the parameter. If you are modifying an existing parameter, this field is unavailable.

   Parameter Type
   Select a parameter type: **String**, **Boolean**, or **Numeric**.

   Parameter Value
   Optionally, specify a default value for this field. Leave blank to require users to specify the value.

   Description
   Specify a description for the parameter.

   Parent Parameter
   Optionally, specify a parent parameter. A parameter is only visible if its parent parameter is enabled.

   Form Label
   Optionally, specify a label to display to end users.

   Parameter Sequence
   Optionally, specify a sequence number to determine where this parameter should be displayed in the parameter list. If you do not specify sequence numbers for parameters, they are displayed alphabetically.

8 Click **Save**.

Adding and Modifying Devices

Use the Devices form to create and modify devices in your device tracking system.

1 Open the Devices form.

2 To add a new device, select a blank line from the grid. To modify an existing device, select it from the grid.

3 Specify this information:

   Device ID
   Specify an ID for the device. If you are modifying an existing device, this field is read only.

   Asset Number
   Optionally, specify an asset number. You can scan the serial number on the device, or you can specify a unique, custom number to identify the device.

   Device Type
   Select a device type.

   Description
   Specify a description for the device.

Supervisor
Optionally, select a supervisor who will be responsible for the device.

Status
The current status of the device is displayed. If you are creating a new device, the status is **Available**.

Operator
Optionally, if you are reporting a new condition for the device, for example, **Broken**, select your operator number.

Facility
Optionally, specify the facility where the device is located.

Location
Optionally, specify the location of the device.

Comment
Optionally, specify a comment about the modifications you are making to the device. Comments are saved in the device activity history displayed in the bottom grid.

4 Optionally, report a condition for the device by clicking **Lost**, **Found**, **Broken**, or **Fixed**.

Deleting Devices

Use the Devices form to delete devices in your device tracking system.

1 Open the Devices form.
2 Select a device from the grid.
3 Click the **Delete an Object** button in the toolbar.

Issuing and Returning Devices

You can issue and return devices using the Device Allocation form or, if you are using a mobile scanner, the Device Allocation transaction.

See "Issuing and Returning Devices Using the Device Allocation Form".

See "Issuing and Returning Devices Using the Device Allocation Transaction".

Issuing and Returning Devices Using the Device Allocation Form

The warehouse mobility icon based menu and list based menu comprises of the Utilities. Device Allocation is listed as a transaction under the Utilities.

On the Utilities:

1 Open the Device Allocation form.

2 Specify this information:

Device ID
Select a device.

Asset Number
The asset number for the device is displayed.

Supervisor
The supervisor responsible for the device is displayed.

Operator
If you are issuing a device, select the operator to whom the device is being issued. If you returning a device, the operator to whom the device was issued is displayed.

Type
The device type is displayed.

Current Status
The status of the device is displayed.

Status Last Updated
The date and time the device status was last updated is displayed.

Comment
Optionally, specify a comment about the issue or return.

3 Click **Issue** or **Return**.

Issuing and Returning Devices Using the Device Allocation Transaction

The warehouse mobility icon based menu and list based menu comprises of the Utilities. Device Allocation is listed as a transaction under the Utilities.

On the Utilities:

1 Select **Device Allocation**.

2 Specify this information:

Device ID
Select a device.

Asset Number
The asset number for the device is displayed.

Supervisor
The supervisor responsible for the device is displayed.

Operator
If you are issuing a device, select the operator to whom the device is being issued. If you returning a device, the operator to whom the device was issued is displayed.

Type
The device type is displayed.

Current Status
The status of the device is displayed.

Last Updated
The date and time the device status was last updated is displayed.

3 Select **Issue** or **Return**.

Reporting Devices as Lost, Found, Broken, and Fixed

Use the Devices form to report devices as lost, found, broken, and fixed.

1 Open the Devices form.
2 Select a device from the grid. The current condition of the device is displayed in the **Status** field.
3 In the **Operator** field, select your operator number.
4 Click a condition button:
   - **Lost**
   - **Found** (only available if the device was reported as lost)
   - **Broken**
   - **Fixed** (only available if the device was reported as broken)

5 Optionally, in the **Comment** field, specify a comment.
6 Click **Save**.

Viewing Device Information

Use the Devices form to view information about a device including its activity history.

1 Open the Devices form.
2 Select a device from the grid. Basic details about the device are displayed in the fields on this form. In the bottom grid, the activity history of the device and any relevant comments are displayed.

Viewing Device Usage and Availability

Use the Current Device Usage form to view which devices are currently in use and which are available.

1 Open the Current Device Usage form.
2 Optionally, specify a supervisor and facility, or a range of supervisors and facilities, and click **Refresh** to filter the devices displayed by their facility and supervisor.
   The status of each device is displayed on the **Device Details** tab.

3 To view a bar graph showing how many of each device type are **Available**, **Assigned**, **List**, and **Broken**, click the **Device Availability** tab. Optionally, click the **Available**, **Assigned**, **List**, or **Broken** icons in the graph legend to hide that condition in the graph.

Defining Device Types

Use the Device Types form to define device types for your device tracking system.

1 Open the Device Types form.

2 To create a new device type, select a blank line from the grid. To modify an existing device type, select it from the grid.

3 Specify this information:

Device Type
Specify a code to use for the device type. For example, **P** for printer.

Description
Specify a description for the device type. For example, **Printer**.

4 Click **Save**.

Configuring an Employee for Kiosk Access

You can establish a cross-reference between an employee and a user on the Employees form. That employee can then log into Factory Track and perform transactions based on the user type of their cross-referenced user. A cross-reference is not required, however, if an employee has been associated with a user.

To establish a cross-reference:

1 Open the Employees form.

2 Select the employee for whom kiosk access will be given.

3 In the **User Name** field, select the user that will be cross-referenced to the selected employee.

4 Specify this information:

Edit Labor
If this check box is selected, user can edit the labor records or insert the gap records. The user must be assigned the required edit privileges in the Employee form.

Edit Absences
If this check box is selected, the employee can change the status of an absence request from **Requested** to **Denied**. Based on the status update the request is cancelled.

Note:

- If the status is set to **Approved**, the employee cannot modify the status to **Denied**.

- Employees cannot edit or delete attendance transactions.

5 In the **Default Resource Group** field, select the resource group.

6 In the **Default Resource**field, select the resource.

Note: If the user selects a resource that is not included in the default resource group, the warning message "Resource is not part of the default resource group" is displayed. The linking of resource groups and resources is established in Syteline. The list of resource groups and resources is defaulted from Syteline.

7 Save the employee record.

8 Open the User Extensions form.

9 Select the user that you specified in step 3.

10 Confirm that the employee ID and name now displayed in the **Employee** field.

Configuring Employee Records

To configure employee records, use the Employees form. If you wish to grant kiosk access to an employee, you must create a Mongoose security profile for the employee on the Users form.

1 Open the Employees form.

2 In the Employees form, select a blank line or an existing employee record from the grid at left.

3 Specify the employee number, employee name, and job title.

4 If you have the Time Track module implemented, select the **Display In TT Mode** check box. This check box allows you to specify additional employee information needed by Time Track.

Note: If you already have employee records defined in Factory Track and are now implementing Time Track for the first time, you can use the Missing Employee Information Required By Time Track Report to identify which employee records need to be updated with additional information for Time Track.

5 On the **General** tab, specify the employee's last name, first name, and middle initial.

6 Specify this additional information:

Badge ID
Specify a badge number. The default value is the employee number.

Payroll ID
Optionally, specify a payroll ID value. This is required only if your payroll application requires a unique ID other than the employee number.

Active
Select to activate the employee record. Employee records must be active for them to appear in the Hours Summary and Hours Detail forms, and to perform transactions against the employee record. Deselect Active to prevent display of the employee's records and the execution of transactions for this employee. For example, consider an employee who has been terminated. As long as the

employee record is active, all report dates prior to the termination date will be displayed and transactions may be performed or edited for those dates. If the record is deactivated, none of the employee's records will display and no further transaction entry or editing will be allowed.

PIN
Specify a PIN number. This number is used to sign into the application as a generic user. This field is only available if the **PIN Required** parameter is selected on the Global Parameters form.-

User Initials
This field is set to a pre-established value, which indicates that the transaction originates in the TT interface, when the labor transaction is submitted through Time Track interface.

Facility
This field is only displayed in Time Track mode. Specify the facility where this employee works.

Department
This field is only displayed in Time Track mode. Specify the department.

Work Group
This field is only displayed in Time Track mode. Specify the work group. An employee's work group defines their supervisor.

Emp Type
This field is only displayed in Time Track mode. Specify the employee type.

Shift
This field is only displayed in Time Track mode. Specify the shift during which this employee will most commonly work.

Shift Pattern
This field is only displayed in Time Track mode. If appropriate, specify a shift pattern from the list.

Indirect Task
This field is only displayed in Time Track mode. Optionally, specify an indirect task from the list. This will be the default task used for filling clocking gaps

ERP Cost Component
This field only applies to ERP LN integrations. Optionally, specify an appropriate value. This value is required if your company has a defined cost structure. This value will be included when transactions post to ERP.

Workset Enabled
Select this check box to validate that an employee is eligible to work in worksets. Worksets allow employees to work on multiple jobs at the same time.

Note: Workset-enabled employees are unable to start just-in-time production orders or production schedules.

Use OT Threshold From Shift
Select this check box to use the overtime thresholds defined on the shift form. Clear this check box to use the overtime thresholds defined on the Employee Types form.

Note:

- Clear the check box to use the California OT Method.
- Select the check box to use Daily & Weekly OT Methods.

- However, you can use Weekly and Daily OT Methods in both ways(selecting or clearing the check box).
- The parameter must be checked to use 7th day.

Time Off Group ID
Optionally, select a time off group. An employee's time off group specifies the amount and types of time off for which the employee is eligible.

7 In the Kiosk Access section, specify this information:

User Name
Specify a username for this employee. The employee must have a Mongoose security profile in order to establish kiosk access. The value entered in this field must be a valid Mongoose profile username.

Attendance
Select this check box to enable this employee to clock in and out from the kiosk.

Labor
Select this check box to enable this employee to start a job from the kiosk.

Absences Requests
Allow this employee to request absence time from the kiosk.

Default Order Type
Specify the default order type the kiosk user should see on the Dashboard Transactions form.

Default Resource Group
Specify the default resource group the kiosk user should see on the Dashboard Transactions form.

Edit Labor
Select this check box to allow this employee to edit and delete their own labor records or create gap records.

Edit Absences
Select this check box to allow this employee to withdraw absence requests.

8 On the **Contact Information** tab, specify this information:

Hire Date
Specify the date the employee was hired, or click the arrow to select a date from the calendar. For active employee records, all report dates equal to or more recent than the hire date will display in the Hours Summary and Hours Detail forms. These dates will accept transactions for the employee. Dates prior to the hire date will not display or accept transactions.

Termination Date
If appropriate, specify a date of termination, or click the arrow to select a date from the calendar. For active employee records, all report dates prior to the termination date will display in the Hours Summary and Hours Detail forms and will accept transactions for the employee. Dates equal to or more recent than the termination date will not display or accept transactions.

Address
Specify address information. Specify city, state, postal/zip code, county, and country values.

Phone
Specify a telephone number.

E-mail Address
Optionally, if this employee will receive email notifications of absence request approvals or denials, specify an email address.

Work Country
If the employee will work in a different country from the country of residence, specify a work country value.

9 On the **Absences** tab, if you are using absence tracking, specify the time off group ID and tracking year. The **Absences** tab is only displayed in Time Track mode.

Tracking year
Displays the tracking group for the available years.

To create a new tracking year:

a Click **new**. Specify the information in the following fields:

- Tracking Year
- Time Off Group Id
- Effective Date

b Click **Save** to view the new tracking year balances.

10 Click **Save**.

11 Optionally, on the **Absences** tab, click **Time Off Requests** to create and view time off requests, or click **View Tracked Absences** to view absence details for the employee. The **Absences** tab is only displayed in Time Track mode.

Configuring Barcodes

You can define how barcodes work in your application by modifying the existing barcode prefixes, combination barcodes, and cross reference values.

Setting up barcode prefixes

You can use the Prefix Handling form to set up barcode prefixes. Barcode prefixes are embedded at the beginning of barcodes and are used to indicate the barcode type. You can set mandatory prefixes to control which barcode types can be scanned into certain field types. Using mandatory prefixes can help prevent users from scanning the wrong barcode into a field. To set up barcode prefixes, see "Setting Up Barcode Prefixes" on page 178.

Setting up combination barcodes

Combination barcodes can increase the efficiency of your scanner operations by combining multiple barcodes into a single barcode string. Use the Multi-Barcode Split form to set up combination barcodes. You can define which transactions will use combination barcodes and define the properties of those combination barcodes. To set up combination barcodes, see "Setting Up Combination Barcodes" on page 179.

Setting up cross reference values

You can use the Cross Referencing form to set up cross references between barcode values. These cross references automatically convert one barcode value to another when the initial value is scanned. For example, assume you regularly receive a part from a vendor with the vendor's barcode value of ABC, while that same part is recognized in your system as part XYZ. You can create a cross reference between the values ABC and XYZ, so that any time the value ABC is scanned, it will be read as XYZ. To set up cross reference values, see "Setting Up Cross Reference Values" on page 179.

Setting Up Barcode Prefixes

Use the Prefix Handling form to set up barcode prefixes. Barcode prefixes are embedded at the beginning of barcodes and are used to indicate the barcode type. You can set mandatory prefixes to control which barcode types can be scanned into certain field types. Using mandatory prefixes can help prevent users from scanning the wrong barcode into a field.

1. Open the Prefix Handling form.
2. To set up a new barcode prefix field type, click **New** or select a blank line from the grid at the left. To modify an existing barcode prefix field type, select it from the grid.
3. Specify or review this information:

   Prefix Field Type
   Specify a name for the field type. If you are modifying an existing barcode prefix field type, this field is read only.

   Prefix Mandatory
   Select this check box to prevent barcodes that do not contain the prefix from being scanned into this field type.

4. In the Data Prefix Details grid, define prefix values for this prefix field type. To define a prefix value, select a blank or existing line in the grid and specify this information:

   Prefix Seq
   Specify the sequence in which to search for this prefix. For example, specify **1** to search for this prefix first when a barcode is scanned in this field type.

   Prefix Code
   Specify a character value for the prefix.

5. Click **Save**.

Setting Up Combination Barcodes

Combination barcodes can increase the efficiency of your scanner operations by combining multiple barcodes into a single barcode string. Use the Multi-Barcode Split form to set up combination barcodes. You can define which transactions will use combination barcodes and define the properties of those combination barcodes.

1. Open the Multi-Barcode Split form.
2. To set up a new combination barcode for a transaction, click **New** or select a blank line from the grid at the left. To modify an existing combination barcode, select it from the grid.
3. Specify this information:

   Transaction Name
   Specify the name of a transaction. If you are modifying an existing combination barcode, this field is read only.

   Source Field
   Select the field in which the barcode will be scanned.

   Fixed Length
   Select to use a fixed character length to define different information types within the combination barcode. Clear to use a separator character to define different information types within the combination barcode.

   Mapping Separator
   This field is only available if **Fixed Length** is cleared. Specify a character to use as a separator.

   No of Fields
   Specify how many fields to include in the combination barcode.

4. In the **Target Field** fields, select the fields to include in the combination barcode.
5. Click **Save**.

Setting Up Cross Reference Values

Use the Cross Referencing form to set up cross references between barcode values. These cross references automatically convert one barcode value to another when the initial value is scanned. For example, assume you regularly receive a part from a vendor with the vendor's barcode value of ABC, while that same part is recognized in your system as part XYZ. You can create a cross reference between the values ABC and XYZ, so that any time the value ABC is scanned, it will be read as XYZ.

1. Open the Cross Referencing form.
2. To set up a new cross reference code type, click **New** or select a blank line from the grid at the left. To modify an existing cross reference code type, select it from the grid.
3. Specify or review this information:

   Xref Code Type
   Specify a name for the cross reference code type. If you are modifying an existing cross reference code type, this field is read only.

Description
Specify a description for the cross reference code type.

Type Priority
Specify a number, **1** through **999**, to determine the priority for searching for this cross reference code type. For example, specify **1** to search for this code type first when a barcode is scanned.

4 In the Xref Values grid, define cross references for this cross reference code type. To define a cross reference, select a blank or existing line in the grid and specify this information:

Xref Field Type
Specify a field type: **C** (customer), **I** (item), or **V** (vendor).

Xref Field Value In
Specify a value, such as an item number, that will be scanned.

Xref Field Value Out
Specify an alternate value, such as an item number, to which to convert the scanned value.

5 Click **Save**.

Creating and Modifying Transaction Parameters

Use the Transaction Specific Parameters Setup form to create and modify parameter options that are only available for specific transactions. Administrators can configure these parameters using generated generic parameters forms.

Caution: Only programmers who are authorized to customize your Infor Factory Track application should use the Transaction Specific Parameters Setup form. Changes made to this form can cause your application to function incorrectly.

1 Open the Transaction Specific Parameters Setup form.
2 If you are creating a new parameter, click **New** or select a blank line on the grid. If you are modifying an existing parameter, select it from the grid.
3 Specify or review this information:

Whse
This field is always blank and unavailable.

Transaction Name
Specify the transaction that will be affected by this parameter. If you are modifying an existing parameter, this field is unavailable.

Trans Parameter Type
Select a parameter type: **String**, **Boolean**, or **Numeric**.

Trans Param Name
Specify a name for the parameter. If you are modifying an existing parameter, this field is unavailable.

Trans Param Value
Optionally, specify a default value for this field. Leave blank to require users to specify the value.

Description
Specify a description for the parameter.

4 Click **Save**.

Configuring Break In/Out Parameters

Use the Transaction Set Maintenance form to configure parameters for the Break In/Out mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **BreakInOut** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Duplicate Protection (HH:MM:SS)
Use this parameter to prevent duplicate transactions. Using the HH:MM:SS format, specify the maximum duration after a transaction that the submission of the same transaction will be considered a duplicate. For example, if you specify a value of **00:01:00**, and a user performs two clock-in transaction within a minute of each other, the second clock-in transaction will be considered a duplicate. When a duplicate transaction occurs, the user will be notified and asked whether to process or cancel the transaction.

5 Click **Save**.

Configuring Clock In/Out Parameters

Use the Transaction Set Maintenance form to configure parameters for the Clock In/Out mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **ClockInOut** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Format is HH:MM:SS (Duplicate Protection)
Use this parameter to prevent duplicate transactions. Using the HH:MM:SS format, specify the maximum duration after a transaction that the submission of the same transaction will be considered a duplicate. For example, if you specify a value of **00:01:00**, and a user performs two clock-in transactions within a minute of each other, the second clock-in transaction will be considered a duplicate. When a duplicate transaction occurs, the user will be notified and asked whether to process or cancel the transaction.

5 Click **Save**.

Configuring Cross Docking Parameters

Use this form to configure cross docking parameters. You can configure separate parameters for different warehouses and for different requirement types, such as Kanban replenishment requests, projects, and sales order lines.

1 Open the Cross Docking form.

2 To configure new parameters for a warehouse or requirement type, select a blank line from the grid or click **Create a New Object**. To modify existing parameters for a requirement type at a warehouse, select the warehouse from the grid.

3 Specify this information:

Whse
If you are configuring new parameters for a warehouse or requirement type, specify a warehouse. If you are modifying existing parameters for a requirement type at a warehouse, the warehouse is displayed.

Requirement Type
If you are modifying existing parameters for a requirement type, the requirement type is displayed. If you are configuring new parameters for a requirement type, select a requirement type. You can select from these requirement types:

- Jobs
- Sales Order Lines
- Transfer Order Lines

Lines that match the selected requirement type will be listed as possible options to which to cross dock when users are performing transactions that meet the requirements for cross docking.

Priority
Specify a number, **1-99**, to indicate the priority of this requirement type. Lower numbers have greater priority and higher numbers have lesser priority. Requirement types with greater priority will be listed first when users are selecting a line to which to cross dock. If more than one requirement type shares the same priority, they will be sorted by date with the most urgent orders listed first.

Future Days
Specify the number of days, **1-99**, into the future for which to allow cross docking for this requirement set. Only open, unreserved lines that are due before this number of days, counting from today's date, will be listed as possible cross docking options.

4 Click **Save**.

Configuring Customer Order Picking Parameters

Use the Transaction Set Maintenance form to configure parameters for the Customer Order Picking mobile scanner transaction.

1 Open the Transaction Set Maintenance form.

2 Select **CustOrdPicking** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Over Pick
Select this check box to allow users to pick a greater quantity than the required quantity.

Loc Recommend(Rank,leastInv,leastPick)
Specify how to sort recommended picking locations:

- **Rank**: highest ranked locations are shown first
- **LeastInv**: locations with the fewest items are shown first, so they will be emptied first
- **LeastPick**: locations with the most items are shown first, allowing the picker to pick from fewer locations

Negative Inventory Allowed
This parameter defines if the factory track user is allowed to perform inventory transactions to drive inventory negative. If the Allow negative inventory parameter is selected in the global parameter form, then only this feature checks the Syteline parameter. If both Allow negative inventory and **Negative Inventory Allowed** are selected, then the factory track user must be allowed to perform such transactions across the modules/interfaces.

Prefill Lot
Select this parameter to allow users to select lots from the location options list.

Stage Location
Specify a default staging location.

5 Optionally, on the **Transaction Parameters** tab, select **Label Print Parameters** to configure label printing parameters for this transaction.

See "Configuring Label Printing Settings for Transactions" on page 164 .

6 Click **Save**.

Configuring Customer Order Shipping Parameters

Use the Transaction Set Maintenance form to configure parameters for the Customer Order Shipping mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **CustOrdShipping** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

No of Days to Ship
Specify a value to filter displayed orders by their scheduled ship date. For example, specify **5** to see only orders scheduled to ship in the next five days. Users can modify this value when performing the transaction.

Stage Location
Specify a default staging location.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save**.

Configuring Cycle Count Parameters

Use the Transaction Set Maintenance form to configure parameters for the Cycle Count mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **CycleCount** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Input Item
Select this check box to require users to confirm the item number by scanning it.

Input Lot
Select this check box to require users to confirm the lot number by scanning it.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Cycle Verify Parameters

Use the Transaction Set Maintenance form to configure parameters for the Cycle Verify mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **CycleVerify** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Input Item
   Select this check box to require users to confirm the item number by scanning it.

   Input Lot
   Select this check box to require users to confirm the lot number by scanning it.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring End Run, End Run Only, End Machine, End Team Run, Job Move, and Team Member Reporting Parameters

Use the Transaction Set Maintenance form to configure parameters for the End Run, End Run Only, End Machine, End Team Run, Job Move, and Team Member Reporting transactions.

1 Open the Transaction Set Maintenance form.
2 Select **SF_JobMove** from the grid.

   Note: There are additional parameters you can configure for the End Team Run and Team Member Reporting transactions by selecting **MES_TeamsTransaction** from the grid. For instructions on setting these additional parameters, see "Configuring End Team Run, Start Team Run, Team Maintenance, and Team Member Reporting Parameters" on page 188.

   Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

3 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Allow Job Close
   Select this check box to allow users to close jobs.

   Allow Operation Complete
   Select this check box to allow users to complete operations.

Allow Scrap
Select this check box to allow users to scrap items.

Confirm Lot
Select this check box to require users to confirm the lot number by re-entering it.

Consider Scrapped
Select to consider scrapped quantities as completed quantities when calculating the remaining balance of quantities to be completed.

Default Qty Move
Select this check box to use the number of completed quantities specified in the **Good** field as the default value for the **Moved** field.

Default Scrap Reason Code
Optionally, specify a SyteLine reason code to use by default for scrapped quantities.

Enable Qty Move
Select to allow users to manually specify moved quantities.

SF End Run Only
Select this check box to enable the End Run Only transaction.

SF End Run Quantity Enabled
Select this check box to allow users to specify the quantity completed when stopping job operations.

Put Away
Select this check box to allow users to specify a receiving location. Clear this check box to always use the default receiving location.

Receiving Location
Specify a default location where completed items will be received.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again

Issue to Parent Job
Select this check box to issue completed items from a sub-assembly job to its parent job, if the parent job is set as the destination for the completed items.

Prompt for issue to Parent Job
Select this check box to allow users to choose whether to issue completed items from a sub-assembly job to its parent job.

Check Qty Received
Select this check box to warn users if they are attempting to report a quantity of good and scrapped items that exceeds the quantity received.

Allow Job Close With Open Reqs
Select this check box to prevent users from closing a job if all material has not been issued.

Default Container
Select this check box to issue items to containers by default. While performing the transaction, the user can still choose not to issue items to a container.

Issue to Parent Job
Select this check box to issue completed items from a sub-assembly job to its parent job. Items will only be issued to a parent job if:

- A parent job is defined for the sub-assembly job in SyteLine.
- The last operation of the sub-assembly job is being performed.

Prompt for Issue to Parent Job
Select this check box to ask users whether to issue completed items to a parent job. Clear this check box to automatically issue completed items to a parent job upon completion of this transaction. If the **Issue to Parent Job** parameter is cleared, this parameter has no effect.

Allow Cross-Docking
Select this check box to allow cross docking from this transaction

4 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
5 Click **Save**.

Configuring End Team Run, Start Team Run, Team Maintenance, and Team Member Reporting Parameters

Use the Transaction Set Maintenance form to configure parameters for the End Team Run, Start Team Run, Team Maintenance, and Team Member Reporting transactions.

1 Open the Transaction Set Maintenance form.
2 Select **SF_TeamsTransaction** from the grid.

Note: There are additional parameters you can configure for the End Team Run and Team Member Reporting transactions by selecting **MES_JobMove** from the grid. For instructions on setting these additional parameters, see "Configuring End Run, End Run Only, End Machine, End Team Run, Job Move, and Team Member Reporting Parameters" on page 186.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Team Member to Report Quantities
Select this check box to allow users to report quantities. Clear this check box to allow only administrators or supervisors to report quantities.

Allow User to be Removed from Team
Select this check box to allow users to remove themselves from a team. Clear this check box to allow only administrators or supervisors to remove members from teams.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Job Booking Parameters

Use the Transaction Set Maintenance form to configure parameters for the Job Booking transaction.

1. Open the Transaction Set Maintenance form.
2. Select **SF_JobMove** from the grid.
3. Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Allow Indirect Job
   Specify **1** to allow employees to start indirect tasks using this transaction. Specify **0** to prevent employees from starting indirect tasks using this transaction

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Job Material Issue Parameters

Use the Transaction Set Maintenance form to configure parameters for the Job Material Issue transaction.

1 Open the Transaction Set Maintenance form.
2 Select **SF JobMaterialIssue** from the grid.
3 Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Adjust for Scrap
   Select this check box to apply the scrap factor to the required quantity of material. The scrap factor increases the required quantity to account for the expected quantity of scrapped material.

   Allow Location Change
   Select this check box to allow users to specify a staging location. Clear this check box to always use the default location.

   Allow Non-BOM Items
   Select this check box to allow users to issue material that is not listed on the bill of materials.

   Allow Non-Inv Items
   Select this check box to allow users to issue material that is not defined in your ERP system.

   Allow Over Issue
   Select this check box to allow users to issue material quantities that exceed the quantity required for the operation.

   Confirm Lot
   Select this check box to require users to confirm the lot number by re-entering it.

   Confirm Over Issue
   Select this check box to prompt users for confirmation when issuing material quantities that exceed the quantity required for the operation.

   Non-Inv Item Acct
   Specify a valid account number from your ERP system. This account number will be used for transactions involving material that is not defined in your ERP system. You should check with your accounting department to determine which account number to use.

   Non-Inv Item Acct Unit1
   Specify a valid Unit Code 1 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit2
Specify a valid Unit Code 2 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit3
Specify a valid Unit Code 3 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit4
Specify a valid Unit Code 4 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Staging Location
Specify a default staging location from which material will be issued.

Warn Partial Issue
Select to warn users when they are issuing less material than is required by the operation.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

Default Container
To use a container by default, specify **Y**.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Job Material Issue Parameters

Use the Transaction Set Maintenance form to configure parameters for the Job Material Issue mobile scanner transaction.

1. Open the Transaction Set Maintenance form.
2. Select **JobMaterialIssue** from the grid.
3. Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Adjust for Scrap
Select this check box to apply the scrap factor to the required quantity of material. The scrap factor increases the required quantity to account for the expected quantity of scrapped material.

Allow Lot Change
Select this check box to allow users to specify a lot number. Clear this check box to always use the recommend lot number.

Allow Location Change
Select this check box to allow users to specify a staging location. Clear this check box to always use the default location.

Allow Negative Inventory
Select this check box to allow users to issue a quantity greater than the available quantity. If your ERP system is not configured to allow negative inventory, this parameter has no effect.

Allow Non-Inventory Items
Select this check box to allow users to issue material that is not defined in your ERP system.

Allow Over Issue
Select this check box to allow users to issue material quantities that exceed the quantity required for the operation.

Confirm Accounts
Select this check box to prompt users for confirmation of accounts when issuing material quantities required for the operation.

Confirm Over Issue
Select this check box to prompt users for confirmation when issuing material quantities that exceed the quantity required for the operation.

Non-Inv Item Acct
Specify a valid account number from your ERP system. This account number will be used for transactions involving material that is not defined in your ERP system. You should check with your accounting department to determine which account number to use.

Non-Inv Item Acct Unit1
Specify a valid Unit Code 1 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit2
Specify a valid Unit Code 2 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit3
Specify a valid Unit Code 3 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit4
Specify a valid Unit Code 4 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

ReEnter Item
Select this check box to require users to confirm the item number by scanning it.

ReEnter Location
Select this check box to require users to confirm the location by scanning it.

ReEnter Lot
Select this check box to require users to confirm the lot number by scanning it.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Job Material Return Parameters

Use the Generic MES_JobMatlReturn Parameters form to configure parameters for the Job Material Return transaction.

1 Open the Transaction Set Maintenance form.
2 Select **SF_JobMatlReturn** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Location Change
Select this check box to allow users to specify a staging location. Clear this check box to always use the default location.

Allow Non-BOM Items
Select this check box to allow users to return material that is not listed on the bill of materials.

Allow Non-Inv Items
Select this check box to allow users to return material that is not defined in your ERP system.

Confirm Lot
Select this check box to require users to confirm the lot number by re-entering it.

Default Receiving Location
Specify a default location at which to receive returned items.

Non-Inv Item Acct
Specify a valid account number from your ERP system. This account number will be used for transactions involving material that is not defined in your ERP system. You should check with your accounting department to determine which account number to use.

Non-Inv Item Acct Unit1
Specify a valid Unit Code 1 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit2
Specify a valid Unit Code 2 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit3
Specify a valid Unit Code 3 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Non-Inv Item Acct Unit4
Specify a valid Unit Code 4 from your ERP system to be used for transactions involving material that is not defined in your system. You should check with your accounting department to determine which unit code to use.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Job Material UnIssue Parameters

Use the Transaction Set Maintenance form to configure parameters for the Job Material UnIssue mobile scanner transaction.

1. Open the Transaction Set Maintenance form.
2. Select **SF_JobMaterialUnIssue** from the grid.
3. Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

ReEnter Item
Select this check box to require users to confirm the item number by scanning it.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Job Receipt Parameters

Use the Transaction Set Maintenance form to configure parameters for the Job Receipt transaction.

1 Open the Transaction Set Maintenance form.
2 Select **SF_JobReceipt** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

Consider Scrapped
Select to consider scrapped quantities as completed quantities when calculating the remaining balance of quantities to be completed.

Put Away
Select this check box to allow users to specify a receiving location. Clear this check box to always use the default receiving location.

Receiving Location
Specify a default location where completed items will be received.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Job Receipt Parameters

Use the Transaction Set Maintenance form to configure parameters for the Job Receipt mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **JobReceipt** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Enable Putaway
Select this check box to allow users to perform put away transactions from within this transaction. Clear this check box to use a separate transaction for item put away.

Enable UOM
Select this check box to allow users to specify the unit of measure.

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Just-In-Time Production Parameters

Use the Transaction Set Maintenance form to configure parameters for the Just-In-Time Production transaction.

1 Open the Transaction Set Maintenance form.
2 Select **SF_JITProd** from the grid.
3 Specify this information:

 Fill Warehouse
 Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

 Successful Message
 Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

 Allow Cross-Docking
 Select this check box to allow cross docking from this transaction.

 Default Container
 To use a container by default, specify **Y**.

 Receiving Location
 Specify a default receiving location where the material is received.

 Putaway
 Select this check box to allow users to perform put away transactions from within this transaction.

 Discrete Transcation
 Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Just-In-Time Production Parameters

Use the Transaction Set Maintenance form to configure parameters for the Just-In-Time Production mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **JITProduction** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

Default Container
To use a container by default, specify **Y**.

Enter Employee
Select this check box to allow users to specify an employee ID. Leave blank to always use the employee ID linked to the currently logged in user account.

Putaway Enabled
Select this check box to allow users to perform put away transactions from within this transaction.

Enter Shift
Select this check box to require users to specify a shift.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save**.

Configuring Kanban Delivery Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Delivery mobile scanner transaction.

1 Open the Transaction Set Maintenance form.

2 Select **KanbanDelivery** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Kanban Location
Select this check box to require users to confirm the Kanban location by scanning it.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save** .

Configuring Kanban Label Printing Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Label Printing transaction.

1 Open the Transaction Set Maintenance form.
2 Select **SF_KBLabelPrinting** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and**Value** columns, configure these parameters:

Default Label Format
Select a format to use for labels.

No of Labels
Specify the number of labels to print for each item.

Print Labels
Select this check box to print labels when the transaction is completed. Label printing is only supported for some transactions.

See "Label Printing Transactions List" on page 140 for a list of transactions that support label printing.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Kanban Pick Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Pick mobile scanner transaction.

1. Open the Transaction Set Maintenance form.
2. Select **KanbanPick** from the grid.
3. Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   ReEnter Item
   Select this check box to require users to confirm the item number by scanning it.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Kanban Request Parameters

Use the Transaction Set Maintenance form to configure parameters for the Kanban Request mobile scanner transaction.

1. Open the Transaction Set Maintenance form.
2. Select **KanbanRequest** from the grid.
3. Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Confirm Request
   To require users to confirm replenishment requests before they are processed.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save** .

Configuring Labor Reporting Parameters

Use the Transaction Set Maintenance form to configure parameters for the Labor Reporting mobile scanner transaction.

1 Open the Transaction Set Maintenance form.

2 Select **SF Labor Reporting Settings** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Job Close With Open Reqs
Select this check box to prevent users from closing a job if all material has not been issued.

Check Qty Received
Select this check box to warn users if they are attempting to report a quantity of good and scrapped items that exceeds the quantity received.

End Run Only
Select this check box to enable the End Run Only transaction.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save**.

Configuring Lunch In/Out Parameters

Use the Transaction Set Maintenance form to configure parameters for the Lunch In/Out mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **LunchInOut** from the grid.
3 Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Duplicate Protection (HH:MM:SS)
   Use this parameter to prevent duplicate transactions. Using the HH:MM:SS format, specify the maximum duration after a transaction that the submission of the same transaction will be considered a duplicate. For example, if you specify a value of **00:01:00**, and a user performs two clock-in transaction within a minute of each other, the second clock-in transaction will be considered a duplicate. When a duplicate transaction occurs, the user will be notified and asked whether to process or cancel the transaction.

5 Click **Save**.

Configuring Miscellaneous Issue Parameters

Use the Transaction Set Maintenance form to configure parameters for the Miscellaneous Issue mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **MiscIssue** from the grid.
3 Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Default ReasonCode
Specify a default reason for the miscellaneous material issue.

Input Document
Select this check box to allow users to specify a document number.

Enable UOM
Select this check box to allow users to specify the unit of measure.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Miscellaneous Receipt Parameters

Use the Transaction Set Maintenance form to configure parameters for the Miscellaneous Receipt mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **MiscReceipt** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Default ReasonCode
Specify a default reason for the miscellaneous material receipt.

Input Document
Select this check box to allow users to specify a document number.

Input Unit of Measure
Select this check box to allow users to specify the unit of measure.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Multi-Site Move Parameters

Use the Transaction Set Maintenance form to configure parameters for the Multi-Site Move mobile scanner transaction.

1 Open the Transaction Set Maintenance form.

2 Select **MultiSiteMove** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Input Unit of Measure
Select this check box to allow users to specify the unit of measure of the item.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save**.

Configuring Physical Inventory By Sheet Parameters

Use the Transaction Set Maintenance Parameters form to configure parameters for the Physical Inventory by Sheet mobile scanner transaction.

1 Open the Transaction Set Maintenance form.

2 Select **PhysInvBySheet** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Input Item
Select this check box to require users to confirm the item number by scanning it.

Input Lot
Select this check box to require users to confirm the lot number by scanning it.

Input Loc
Select this check box to require users to confirm the location by scanning it.

Input Serial
Select this check box to require users to confirm the serial number by scanning it.

Input Whse
Select this check box to require users to confirm the warehouse by scanning it.

5 Click **Save**.

Configuring Physical Inventory By Tag Parameters

Use the Transaction Set Maintenance form to configure parameters for the Physical Inventory by Tag mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **PhysInvByTag** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Input Item
Select this check box to require users to confirm the item number by scanning it.

Input Location
Select this check box to require users to confirm the location by scanning it.

Input Lot
Select this check box to require users to confirm the lot number by scanning it.

Input Serial
Select this check box to require users to confirm the serial number by scanning it.

5 Click **Save**.

Configuring PPS Packing Parameters

Use the Transaction Set Maintenance form to configure parameters for the PPS Packing mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **PPSPacking** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Selection by Order
Select this check box to allow users to search for shipments by order number.

Allow Packer
Select this check box to allow users to search for shipments by user ID.

Selection by Picklist
Select this check box to allow users to search for shipments by pick list number.

Select First Shipment
Select this check box to always use the first shipment that matches the search criteria. Clear to allow the user to select a shipment from a list.

Selection by Pack location
Select this check box to allow users to search for shipments by pack location.

Selection by Shipment
Select this check box to allow users to search for the shipments from the shipment list.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring PPS Pick Confirm Parameters

Use the Transaction Set Maintenance form to configure parameters for the PPS Pick Confirm mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **PPSPickConfirm** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Create Shipment
Select this check box to allow users to create a shipment from within this transaction. Creating a shipment from within this transaction will skip the packing transaction.

Selection by order
Select this check box to allow users to search for pick lists by order number.

selection by pick list
Select this check box to allow users to search for pick lists by pick list number.

selection by picker
Select this check box to allow users to search for pick lists by user ID.

Allow User to Change Picker Field
Select this check box to allow users to specify a picker.

Auto Populate Picker With User ID
Select this check box to automatically specify the current user ID in the **Picker** field.

Default Create Shipment
Select a default shipment for this transaction. The user can change this value.

Display Today's Pick List
Select this check box to skip the manual search function and to automatically search for pick lists using the current date.

Display User's Pick List
Select this check box to skip the manual search function and to automatically search for pick lists using the current user ID.

Select First Pick List
Select this check box to always use the first pick list that matches the search criteria. Clear to allow the user to select a pick list from a list.

Selection by Pack location
Select this check box to allow users to search for shipments by pack location.

Selection by Pick location
Select this check box to allow users to search for shipments by pick location.

5 Click **Save**.

Configuring PPS Picking Parameters

Use the Transaction Set Maintenance form to configure parameters for the PPS Picking mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **PPSPicking** from the grid.
3 Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Allow Overpick
   Select this check box to allow users to pick a greater quantity than the required quantity.

   Today Picklist
   Select this check box to skip the manual search function and to automatically search for pick lists using the current date.

   Create Shipment
   Select this check box to allow users to create a shipment from within this transaction, thereby skipping the PPS Packing transaction.

   Select First Pick Item
   Select this check box to always use the first un-picked item on the pick list. Clear to allow the user to select an item from a list.

   Select First Picklist
   Select this check box to always use the first pick list that matches the search criteria. Clear to allow the user to select a pick list from a list.

   Sort Item
   Select this parameter to sort the pick list by item. If the **Sort Item** and **Sort Loc** parameters are both selected, the **Sort Loc** parameter takes precedence.

   Sort Loc
   Select this parameter to sort the pick list by location. In most cases, you should select this parameter so pickers can pick items location by location as they walk through the factory. If the **Sort Item** and **Sort Loc** parameters are both selected, the **Sort Loc** parameter takes precedence.

   Confirm Item
   Select this check box to require users to confirm the item number by scanning it.

   Lot Required
   Select this check box to require users to confirm the lot number by scanning it.

   Loc Required
   Select this check box to require users to confirm the location by scanning it.

Confirm Lot
Select this check box to require users to confirm the lot number by scanning it.

Confirm Loc
Select this check box to require users to confirm the location by scanning it.

Selection by Order
Select this check box to allow users to search for pick lists by order number.

Selection by Picker
Select this check box to allow users to search for pick lists by order number.

Selection by Pick list
Select this check box to allow users to search for pick lists by pick list number.

Selection by Pack location
Select this check box to allow users to search for shipments by pack location.

Selection by Shipments
Select this check box to allow users to search for shipments by pick location.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring PPS Shipping Parameters

Use the Transaction Set Maintenance form to configure parameters for the PPS Shipping mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **PPSShipping** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Pro Number
Select this check box to allow users to track shipments using a pro number.

Allow Tracking Number Input
Select this check box to allow users to track shipments using tracking numbers.

Allow update Shipment Status
Select this check box to allow users to update the shipments status.

Allow Vehicle
Select to allow users to assign a vehicle number to shipments, indicating which vehicle picked up the shipment.

Auto Ship After Verify
Select this check box to automatically ship the shipment once it has been verified.

Default Confirm Ship
Select this check box to update the shipment status to default status.

Selection by Pack location
Select this check box to allow users to search for shipments by pack location.

Selection by Shipment Location
Select this check box to allow users to search for shipments by shipment location.

Verify Lines Mandatory
Select this check box to require users to verify each line on a shipment before verifying the entire shipment.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Production Schedule Receipt Parameters

Use the Transaction Set Maintenance form to configure parameters for the Production Schedule Receipt transaction.

1. Open the Transaction Set Maintenance form.
2. Select **SF_PSReceipt** from the grid.
3. Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Consider Scrapped
Select to consider scrapped quantities as completed quantities when calculating the remaining balance of quantities to be received.

Put Away
Select this check box to allow users to specify a receiving location. Clear this check box to always use the default receiving location.

Receiving Location
Specify a default location where completed items will be received.

Scrap Reason Code
Optionally, specify a SyteLine reason code to use by default for scrapped quantities.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

Default Container
To use a container by default, specify **Y**.

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Production Schedule Reporting Parameters

Use the Transaction Set Maintenance form to configure parameters for the Production Schedule Reporting mobile scanner transaction.

1. Open the Transaction Set Maintenance form.
2. Select **ProductionSchedule** from the grid.
3. Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

Enter Employee
Select this check box to allow users to specify an employee ID. Leave blank to always use the employee ID linked to the currently logged in user account.

Enable Putaway
Select this check box to allow users to perform put away transactions from within this transaction.

Enter Shift
Select this check box to require users to specify a shift.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Purchase Order Receipt Parameters

Use the Transaction Set Maintenance form to configure parameters for the Purchase Order Receipt mobile scanner transaction.

1. Open the Transaction Set Maintenance form.
2. Select **POReceipt** from the grid.
3. Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

Combine Putaway
Select this check box to allow users to perform put away transactions from within this transaction.

Cross Reference for Job Operation Move
Select this check box to automatically move received items for a cross-referenced order to the next job operation.

Cross Reference for Job Order
Select this check box to allow received material to be automatically allocated to cross-referenced orders.

Default Receipt Type
The default receipt type is displayed in the PO field of the transaction.

Prompt User to perform Job Material Issue
Select this check box to prompt users to issue material to cross-referenced orders from within this transaction.

Prompt User to perform Job Operation Move
Allows user to report the operation after issuing cross referenced item to the same job operation.

Receive By Line
Select this check box to use order lines to specify the items to receive from purchase orders. Clear this check box to use item numbers to specify the items to receive from purchase orders.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Putaway Parameters

Use the Transaction Set Maintenance form to configure parameters for the Putaway mobile scanner transaction.

1. Open the Transaction Set Maintenance form.
2. Select **Putaway** from the grid.
3. Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Default Type
   Optionally, select a default origin type for put away items.

   PreFill Lot
   Select to allow users to select lots from the location options list.

   PutawayMethod(Rank,Consolidate)
   Specify **Rank** to sort suggested put away locations by the highest rank. Specify **Consolidate** to prioritize locations that already contain the item being put away.

   Consolidate Sort(Rank,Least,Most)
   This parameter is only applicable if **Consolidate** is selected as the put away method. Specify how to sort suggested locations when more than one location contains the item being put away:

   - **Rank**: highest ranked locations are shown first

- **Least**: locations with the fewest items are shown first
- **Most**: locations with the most items are shown first

Exclude Empty Location
Select this check box to exclude empty locations as possible putaway locations.

Exclude Temporary Location
Select this check box to exclude temporary locations as possible putaway locations.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save**.

Configuring QCS Disposition Parameters

Use the Transaction Set Maintenance form to configure parameters for the QCS Disposition transaction.

1 Open the Transaction Set Maintenance form.

2 Select **QCSDisposition** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

Cross Reference for Job Order
Select this check box to allow received material to be automatically allocated to cross-referenced orders.

Default Accept Location
Specify a default location for accepted items.

Default Accept Reason Code
Specify a default reason code for accepted items.

Default Issue Reason Code
Specify a default reason code for issued items.

Default Reject Reason Code
Specify a default reason code for rejected items.

Prompt For Item
Select this check box to prompt users to issue items to cross-referenced orders from within this transaction.

Prompt For Order Number
Select this check box to prompt users to issue order number from order number list to cross-referenced orders from within this transaction.

Prompt For Order Type
Select this check box to prompt users to issue order type from order type list to cross-referenced orders from within this transaction.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Quantity Adjustments Parameters

Use the Transaction Set Maintenance form to configure parameters for the Quantity Adjustments mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **QuantityAdjustments** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow ReasonCode Change
Select this check box to allow users to change the reason code for quantity adjustments. Clear this check box to always use the default reason code.

Default Reason Code
Specify a default reason for quantity adjustments.

Parameter Document Number
Select this check box to allow users to specify a document number.

Enable UOM
Select this check box to allow users to specify the unit of measure.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save**.

Configuring Start Project Labor and End Project Labor Parameters

Use the Transaction Set Maintenance form to configure parameters for the Start Project Labor and End Project Labor transactions.

1 Open the Transaction Set Maintenance form.
2 Select **SF_ProjectLabor** from the grid.
3 Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   Allow Pay Rate Entry
   Select this check box to allow users to specify a pay rate.

   Discrete Transaction
   Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Click **Save**.

Configuring Start Service Labor, End Service Labor, and SRO Material Parameters

Use the Transaction Set Maintenance form to configure parameters for the Start Service Labor, End Service Labor, and SRO Material transactions.

1 Open the Transaction Set Maintenance form.
2 Select **SF_ServiceLabor** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

HR Updateable
Select this check box to display default values in the **Work Hr** and **Bill Hr** fields.

Allow Bill Code Entry
Select this check box to allow users to specify a bill code.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring SRO Material Parameters

Use the Transaction Set Maintenance form to configure parameters for the SRO Material mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **SROMaterial** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Bill Code and Price Code Display
Select this check box to display the bill code and price code.

Transaction Type
Specify a default transaction type:

- **Issue**
- **UnIssue**

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Stock Move Parameters

Use the Transaction Set Maintenance form to configure parameters for the Stock Move mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **StockMove** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Document Number In Use
Select this check box to allow users to specify a document number.

Input Unit of Measure
Select this check box to allow users to specify the unit of measure of the item.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Transfer Order Receipt Parameters

Use the Transaction Set Maintenance form to configure parameters for the Transfer Order Receipt mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **TransferOrderReceipt** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Combine Putaway
Select this check box to allow users to perform put away transactions from within this transaction.

Receive By Line
Select this check box to use order lines to specify the items to receive from transfer orders. Clear this check box to use item numbers to specify the items to receive from transfer orders.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.

6 Click **Save**.

Configuring WIP Move Parameters

Use the Transaction Set Maintenance form to configure parameters for the Work In Progress Move mobile scanner transaction.

1 Open the Transaction Set Maintenance form.

2 Select **WIPMove** from the grid.

3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Allow Cross-Docking
Select this check box to allow cross docking from this transaction.

Calculate Reject Based on Complete Move
Select this check box to calculate the rejected quantity by subtracting the quantity of items moved from the quantity completed.

Close Job
Select this check box to allow users to close jobs.

Complete Operation
Select this check box to allow users to complete operations.

Default Location
Specify a default location.

Default Reason Code
Specify a default reason code for rejections.

Issue to Parent Job
Select this check box to issue completed items from a sub-assembly job to its parent job, if the parent job is set as the destination for the completed items.

Prompt for issue to Parent Job
Select this check box to allow users to choose whether to issue completed items from a sub-assembly job to its parent job.

Move Enable
Select this check box to allow users to report the quantity to move to the next operation. Clear this check box to only allow reporting of completed and scrapped quantities. If this check box is cleared, items will be automatically moved to the next operation when the current operation is completed.

Qty Scrap Calc
Select this check box to subtract scrapped quantities from the **Opn Qty** field. Clear this check box to disregard scrapped quantities when calculating the open quantity.

Report Last Operation
Select this option to report the last operation on the job before items are moved.

5. Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6. Click **Save**.

Configuring Work Center Material Issue Parameters

Use the Transaction Set Maintenance form to configure parameters for the Work Center Material Issue transaction.

1. Open the Transaction Set Maintenance form.
2. Select **SF Workcenter Material Issue** from the grid.
3. Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Confirm Lot
Select this check box to require users to confirm the lot number by re-entering it.

WC Staging Location
Specify a default staging location from which material will be issued.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Click **Save**.

Configuring Work Center Material Issue Parameters

Use the Transaction Set Maintenance form to configure parameters for the Work Center Material Issue mobile scanner transaction.

1 Open the Transaction Set Maintenance form.
2 Select **WorkCenterMaterial** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Enter UOM
Select this check box to allow users to specify the unit of measure.

Enter Employee
Select this check box to allow a user to specify an employee ID. Clear this check box to always use the employee ID that is currently logged in.

Allow Negative Inventory
Select this check box to allow users to issue a quantity greater than the available quantity. If your ERP system is not configured to allow negative inventory, this parameter has no effect.

Note: If the check box is selected, the logic must check the Syteline parameter.

5 Optionally, on the **Transaction Parameters**tab, select Label Print Parameters to configure label printing parameters for this transaction.
6 Click **Save**.

Configuring Work Center Parameters

Use the Transaction Set Maintenance form to configure parameters for the Work Center form.

1 Open the Transaction Set Maintenance form.
2 Select **SF_WorkCenterUI** from the grid.
3 Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Work Center Popup Enabled
Select this check box to open a separate form when users perform an action, such as **Add Run** or **Start Indirect**, allowing users to complete the action on the newly opened form. For example, if a user selects an operation and taps **Add Run**, the Workset Maintenance form is opened, allowing the user to add the operation to the workset using that form. Clear this check box to complete most actions listed in the Tasks section or Workset section directly from the Work Center form when users perform an action. For example, if a user select an operation and taps **Add Run**, the operation is immediately added to the workset without opening any additional forms.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

Show Service Labor Tab
Select this check box to display the **Service Labor** tab, allowing employees to report time to SRO jobs.

Show Project Labor Tab
Select this check box to display the **Project Labor** tab, allowing employees to report time to projects.

5 Click **Save**.

Configuring Work Center Status Parameters

Use the Transaction Set Maintenance form to configure efficiency levels and refresh intervals for work centers. The settings on this form apply to all work centers that do not have efficiency levels and refresh intervals defined on the Work Center Status Parameters form.

1. Open the Transaction Set Maintenance form.
2. Select **MES_WorkCenterStatus** from the grid.
3. Specify this information:

   Fill Warehouse
   Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

   Successful Message
   Select this check box to show a success message when the transaction is successfully completed.

4. On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

   High Efficiency Level
   Specify the minimum efficiency level that must be reached for a work center to be operating at high efficiency.

   Medium Efficiency Level
   Specify the minimum efficiency level that must be reached for a work center to be operating at medium efficiency. Work centers that have efficiency percentages below this value are operating at low efficiency.

   Refresh Interval
   Specify how often the efficiency percentage should be calculated.

   Discrete Transaction
   Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5. Click **Save**.

Configuring Workset Maintenance Parameters

Use the Transaction Set Maintenance form to configure parameters for the Workset Maintenance form.

1. Open the Transaction Set Maintenance form.
2. Select **SF_WorksetMaint** from the grid.
3. Specify this information:

Fill Warehouse
Select this check box to pre-fill the warehouse on the transaction with the warehouse assigned to the user. The user can change this warehouse for a specific transaction if needed.

Successful Message
Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, in the **Parameter** and **Value** columns, configure these parameters:

Report Quantity
Select this check box to allow users to report quantities.

Discrete Transaction
Select this check box to require generic users to sign in again using the Employee Authentication form after performing this transaction. Clear this check box to allow users to perform additional transactions, after performing this transaction, without signing in again.

5 Click **Save**.

Creating Badges

1 Open the Badges form.
2 Select the last row from the grid at left.
3 Specify the badge number.
4 Select **Active**.
5 Specify a valid employee number.

Modifying Badges

1 Open the Badges form.
2 Select the badge from the grid at left.
3 To assign an employee to the badge, specify a valid employee number.
4 To activate the badge, select **Active**. To deactivate the badge, clear this check box.
5 Click **Save**.

Menu Management Overview

This process explains the logic of logging into the URL with a definite starting menu group for the user.

On the specific URL:

1 Log on to the specific URL with user name, password, and configuration.

2 The application checks for the validity of the **menu group** on User Extension form.

  a If no value is set on the User Extension form, the application checks for the **Menu Group** on the Site Parameters form.

3 Next, the application validates for the URL type, either Icon or List URL.

  a If the URL is Icon based, the application checks for the Icon Menu Style Top-level Menu, for the specific Menu Group.

  b If the URL is List based, the application checks for the List Menu Style Top-level Menu, for the specific Menu Group.

4 Based on the above criteria, the application displays the user's starting **Menu**.

Processing Label Print Utility

The Utility Label form consists of multiple tabs; one for each label type, and an additional tab to display and maintain default values for each tab.

To print the labels, user can:

1 Indicate the warehouse and printer.

2 Select the tab for which the labels are printed:

- Location
- Inventory
- Container
- Inventory code
- Task
- Employee

3 Specify this information:

Location tab
Use this tab to print labels for identifying locations in the warehouse. Specify this information:

- **Warehouse**: This field defaults the user’s current warehouse.
- **From/To Location**: User can select the range of the location.

Inventory tab
Use the tab to print labels for inventory (non-container). Specify this information:

- **Warehouse**: This field defaults the user’s current warehouse.
- **From/To Location**: User can select the range of the location.
- **From/To Item**: User can select the range of the item.

- **Inventory in Container**: If specified as Yes, prints labels for inventory stored in containers.

Container tab
Use the tab to print labels for inventory (container).

- **Warehouse**: This field defaults the user's current warehouse.
- **From/To Location**: User can select the range of the location.
- **From/To Container**: User can select the range of the container.

Inventory Code tab
Use this tab to print labels for inventory transactions/adjustments.

- **Reason Code**: User can select the type(Drop Down for Adjustment code, Cycle code codes, Misc receipt, Misc. issue and Scrap reason codes) .

Task tab
Use this tab to print labels for Task identifiers.

- **Task type**: User can select the type (indirect, Project, service, production order, production schedule).

Employee tab
Use this tab to print label for employee numbers from the specific ERP system.

- **From/To Employee**: User can select the range of the employee.

Defaults
Use this tab to view the data set as the default values in all the tabs. This data is set as default:

- Label Name
- Printer
- Number of Copies,

Note: You can use the **Save As Default** option to set the data specified in the above mentioned fields as the default values.

4. Click **Save As Default** to save the current **Label Name**,**Default Printer**, and **Number of Copies** for the label type corresponding to the current tab. The specified data is defaulted in the **Defaults** tab.

   The **Label Name**, **Printer** and **Number of copies** fields are common for all tabs. The values for these fields are defaulted based on the setup record.
5. Click **Print**, the standard printing process is executed to create the header and detail print records. After the records are created, the printing of these records is initiated.