

ERP Consulting Web Development Custom Programming Solutions Desktop & Web Applications for Manfact

## NorthClark Computing, Inc.

# MRP Planned Order Release User Guide

Web and Desktop Applications for Manfact by Epicor

January 12, 2010

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## Introduction

The NorthClark MRP Planned Order Release module allows Buyers and Planners to quickly respond to Planned Order recommendations and Exception Messages generated by the Manfact Material Requirements Planning process. Authorized people have the ability to:

- Select a population of Planned Order records and view a list in spreadsheet form:
  - > For manufactured parts, a new Work Order may be created.
  - Select one or more Planned Order records to be copied to a new PO record for a specified Supplier. The new PO record is placed on hold, allowing the Buyer to complete and transmit the Purchase Order using NorthClark Buyer's Workbench.
  - For parts that have been setup on Blanket Purchase Orders, new line items may be automatically posted to existing PO records.
  - XML documents representing EDI 830 transactions may be generated to notify the Supplier of blanket order releases, as well as forecasted orders.
- Select a population of MRP Exception Messages and view a list in spreadsheet form:
  - > Automatically reschedule or cancel an existing Work Order
  - Launch the NorthClark Buyer's Workbench and open a Purchase Order that needs to be rescheduled.
- Support the Automatic PO Release process by assigning an existing Manfact Blanket Purchase Order to a specific Supplier and Part Number combination.
- Identify Suppliers who will receive Purchase Order updates automatically via EDI 830 transactions. These documents are produced in XML format. The 830 transaction may be either a firm order, or a forecast, based on a *Time Fence* established for the Supplier.

NorthClark Desktop Applications use a spread-sheet style interface with familiar editing tools such as copy, paste, and word wrapping. Users may rearrange the column order, and hide unwanted columns. All spreadsheet views may be printed or exported to Microsoft Excel.

## **MRP Planned Order Release**

When the MRP Planned Order Release application is started, the main screen is displayed with the following tabs:

1. Search Options

Search for Planned Orders and Exception Messages in your Manfact system using a variety of search criteria. Wildcarding is supported where sensible.

2. Planned Orders

Displays a list of Planned Order records for the selected Planning Group. Use this view to modify Planned Order records, create new Work Orders, issue new releases against Blanket Purchase Orders, and generate Supplier Order Release and Forecast notices in XML format.

3. Exception Messages

View and respond to Exception Messages generated by the MRP system. Reschedule or cancel existing Work Orders automatically, or branch to NorthClark's Buyer's Workbench to update Purchase Orders.

## **Search Options**

🔺 MRP Planned Order Release		
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D B 80 B X C M - ?		
1. Search Options 2. Planned Orders 3. Exception Mes	sages	
	Make/Buy Items:	Planned Order Status:
	<ul> <li>All</li> <li>Blanket PO's</li> </ul>	🗆 All 👘 On Hold
Buyer:	C Make C EDI 830	🗆 None 🗖 Cancelled
Planner:	C Buy	🔽 Open 🔲 Released
Primary Supplier:	Order Start Date:	Exception Messages
PO Number:	Start Date 07/30/08	I All
Part Number:	End Date 07/30/08	None
Product Class:		Negative Balance
	Order Due Date:	Reschedule In
Sub-Class:	Start Date 07/30/08 💌	Reschedule Out
Part Type:	End Date 07/30/08 💌	Cancel Order
Part Category:		🔽 On Hand No Reqmts
,		Order Due within Leadtime
Clear Search Sets:	▼ c≇ Load 🔲 Save	e Save X Remove
∯AgiSearch ′		Dates
Ready		Account: MDEM05.9

Begin by selecting a Planning Group from the drop-down list at the first prompt. The remaining fields on the Search Options display may be used in any combination to narrow your search (leave the field blank if you do not wish to consider it in the search). *Wildcarding* is supported for text fields.

The Search screen is used to locate both Planned Orders and Exception Messages in your Manfact system. The checkboxes on the right side of the screen allow you to choose the types of orders and messages to include. In the above example, the program will select only *open* Planned Order records, and *all* Exception Messages. Note that Manfact clears and regenerates Planned Order records during the MRP process, so selecting the *Released* option allows you to view Planned Order records that have been converted to orders since the last MRP run.

The Make/Buy option allows you to limit your selection to either manufactured or purchased parts. You may narrow your search even further by selecting either *Blanket POs* or *EDI 830* items, which includes only those part numbers that have been assigned to a specific Supplier and Purchase Order using the Part/Supplier options discussed later in this document.

Once the desired selection criteria have been entered, click the **Search** button, and the qualifying records are displayed.

#### Search Sets

The **Search Set** commands at the bottom of the screen allow each user to name and save their favorite search options. Select an existing Search Set from the drop-down list, or type a description to name a new Search Set.

Click the **Save** button to save the settings for the named Search Set. Click the **Load** button to recall the saved settings. Click the **Remove** button to permanently delete the Search Set from the list. Check the **Save Dates** box if you want the system to remember dates when settings are saved. If this box is unchecked, all date fields will be blank the next time the Search Set is retrieved.

## **Planned Orders**

This view displays a list of Planned Order records that meet your search criteria.

4	MRP P	lanned (	Order	Rel	ease																	
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		ch opdoi	10				<b>0</b> . E.	scoption message														
		Release	Statu	ıs	Mał Bu	ke y	Part#	Description	Part Rev	Part Hold	Start Date	Required Date	Required Qty	New Date	New Qty	Invloc	Buyer	Supplier Hold	Blanket POQ#	P0 / W0#	EDI 830?	
	1		Open	•	Buy	•	1003U	INSTALLATION			06/02/09	06/12/09	15				T8				Γ	î
	2		Open	•	Buy	-	1505	COUPLING MOT			01/01/00	01/01/00	34	01/11/10	34							1
	3		Open	•	Make	-	XYZ	HOUSING, MOTO	С		01/01/00	01/01/00	132	01/11/10	132		B2					
	4		Open	•	Make	-	GCE0601	POWER DRIVE #			06/12/09	06/22/09	15									
	•																				▶	
	Sele	lect All ct None	Sele Sele	ect   ect f	Firm Fcst			New₩ ✓ Pri ✓ Pri	ork O nt Tra nt Pic	rders aveler :ker				ipen NCC,	_BWB		Save Ord	Planned ers	<b>F</b>	Release Ord	Selecto ers	źd
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Additional columns are displayed as you scroll to the right...

٨	MRP I	Planne	d Order	Release																	
File	Edit	View	Tools H	elp																	
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1	. Sea	rch Opt	ions 2.	Planned Ord	ers 3.	Except	ion Mes	sages													
		Firm / Fost?	Supplier ID	Supplier Name	Lead Time	P0 Notes	Internal Notes	Qty On Hand	Safety Stock	Order Policy	Order Qty	Order Multiple	Days of Supply	MPS?	Planner	Part Class	Sub Class	Part Type	Part Category	PLORD#	
	1	Firm	1	MATTHEW'S	8			0	0	D	0	0	0	Γ	RR	С	9	XTR	500	45.1*MAGTORS	
	2	Firm	1342	HARDWARE	23			3	0	D	0	0	0		RR	С	9	4	500	38.1*MAGTORS	
	3	Firm	1	MATTHEW'S	21			0	125	D	0	12	0	<b>V</b>	RR	С	9	OL	CAT3	1*MAGTORS	
	4	Firm			6			0	0	D	0	0	0		RR	С	9	OL	CAT1	3*MAGTORS	-
	•																				
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Rea	dy																			Account: MDEM05	i.9 _/

Once an order is successfully released, the row is automatically moved to the bottom of the list, and the Status is changed to Released. The row color also changes making it easier to differentiate items that have already been processed. The Work Order Number or PO Line Number assigned by the system is also shown.

٨	MRP Planned Order Release																			
File	e Edit View Tools Help																			
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1	. Sear	ch Optio	ns 2. Pla	nned Ord	ers 3. Ex	ception Mess	ages	1												
[						-	-	-												
		Release	Status	Make Buy	Part#	Description	Part Rev	Part Hold	Start Date	Hequired Date	Required Qty	New Date	New Qty	Invloc	Buyer	Supplier Hold	Blanket POQ#	P07 W0#	EDI 830?	St 🔺
	57		Open 🚽	Make 🚽	XYZ3	HOUSING, MC	С		01/01/00	01/01/00	132	01/11/10	132		B2	Γ			Γ	
	58		Released	Buy 🚽	3504	CLUTCH PLAT			03/04/09	04/02/09	10	03/01/10	10	STK-3	T5		6-3	B6	<b>V</b>	2
	59		Released	Buy 🚽	4502C	CASTING, STA			11/13/09	12/16/09	200			STK-3	ТЗ		6-2	B6*7	<b>V</b>	2
	60		Released	Make 🚽	2002	ROTOR ASSE	С		12/25/09	01/04/10	12							125		13
	61		Released	Make 🚽	XTR500C	POWER DRIV			12/12/06	12/20/06	1							124		
	62		Released	Make 🚽	2001-1	HOUSING, MC	С		01/01/00	01/01/00	125	01/11/10	125		B2			122		13
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				. 1		New	Worl	(Orde	rs:											
	Se	ectAll	Select	Firm		<b>N</b>	Print	Trave	ler		-2	finen Nf	°C RW	R	Say	/e Planned		Relea	se Sele	cted
	Select None Select Fcst																			
Rea	ady																			

#### Select All, None, Firm or Forecast

You can choose the items you want to release by clicking the checkboxes in the first column. The selection buttons on the bottom-left corner of the screen allow you to quickly select or de-select multiple rows at once. The rows you have selected for processing will change color to green.

Purchased parts are classified as "Forecast" when the requirement is for a future date outside the time fence defined for the Supplier and Part Number (see Part/Supplier Options for more information). All other items, including all manufactured parts, are classified as "Firm".

### **Releasing Planned Orders**

Select one or more rows, then click the **Release Selected Orders** button on the lower-right corner of the screen. One of the following actions will be performed, depending on the type of row being processed:

- For manufactured items, a new work order is created. Note, parameters for automatically releasing work orders are defined using Manfact's **TABLE.PLORD** procedure. This includes the Account Code, Cost Type, WIP Location, Work Order Status, Yield Option, and a Default Routing.
- If the part is a buy item, and an existing Purchase Order Number has been assigned for the Supplier and Part Number, and the Required Date is inside the Time Fence, a new line item will be added to the existing Purchase Order. An EDI 830 order notification will be created if this feature has been enabled for the Supplier.
- If the part is a buy item, and a Manfact Blanket PO Number (POQ#) has been assigned for the Supplier and Part Number, and the Required Date is inside the Time Fence, a new release will be created against the designated Manfact POQ record. An EDI 830 order notification will be created if this feature has been enabled for the Supplier.
- If the part is a buy item, and an existing PO or Blanket Order has not been assigned for the Supplier and Part Number, and the Required Date is inside the Time Fence, a new PO will be created. A special prefix may be assigned for these orders using the EDI Parameters screen within NCC\_BWBAdmin. An EDI 830 order notification will be created if this feature has been enabled for the Supplier.
- If the part is a buy item, and the Required Date is outside the Time Fence, an EDI 830 forecast record will be created if enabled for the Supplier. Note, a field in the EDI 830 transaction distinguishes the forecast record from a firm order. However, if an existing PO or Blanket Order has not been assigned to the part, the following error message is displayed, and the row cannot be selected:



Please refer to the System Administration section for more information about setting up Suppliers to receive EDI 830 notifications.

#### Saving Planned Orders

The Save Planned Orders button at the bottom of the screen allows you to save changes to planned order dates, quantities, and inventory locations, without releasing the order. Note that when you Release a Planned Order, your changes are saved automatically, so it is not necessary to click both buttons.

## **Open Buyer's Workbench for Selected Order**

The **Open NCC\_BWB** button will allow you to open a new Buyer's Workbench session for a selected order. When you click on a row with a Purchase Order Number assigned to it, this button will be enabled, and the caption will read: "Open PO: " followed by the selected PO Number.

## Print Work Order Traveler and/or Pick-List

Check these options at the bottom of the screen if you wish to print documents for any new Work Orders when they are created. If you leave these options unchecked, you may print the paperwork at a later time using Manfact's WO.SET and PICKER.SET procedures.

### **Planned Order Columns**

Release Checkbox	-	
Status	-	
Make/Buy	-	
Part Number	-	
Description	-	
Part Revision	-	
Part Hold	-	
Start Date	-	
Required Date	-	
Required Qty	-	
New Date	-	
New Quantity	-	
Inventory Location	-	
Order Notes	-	
Planner Notes	-	
Buyer	-	
Supplier ID	-	
Supplier Name	-	
Supplier Hold	-	
POQ Number	-	
PO or WO Number	-	
EDI 830 Flag	-	
Firm or Forecast	-	
Lead Time	-	

Qty On Hand	-
Safety Stock	-
Order Policy	-
Order Qty	-
Order Multiple	-
Days of Supply	-
MPS Flag	-
Planner	-
Part Class	-
Part Sub-Class	-
Part Type	-
Part Category	-
Planned Order ID	-

## **Exception Messages**

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File	Edit	View Tools	Help												
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1	. Sea	ch Options   3	2. Planne	d Orders 3. Exception Messages											- 1
		Reschedule?	Status	Message	Part#	Description	Part Rev	Part Hold	From Date	From Qty	New Date	New Qty	Make Buy	P0 / W0#	
	25	Γ	Open	Expedite From 12/18/06 to 12/12/06	1003C	INSTALLATION			12/18/06	500	12/12/06	500	Buy	B7*5	
	26	Γ	Open	Cancel Qty 1	1003C	INSTALLATION				500		499	Buy	B7*5	
	27		Released	Expedite From 06/11/07 to 01/09/10	1004MS	FRAME ASSY.			06/11/07	20	01/09/10	20	Make	50	
	28		Released	Expedite From 05/10/09 to 01/09/10	1004MS	FRAME ASSY.			05/10/09	3	01/09/10	3	Make	49	
	29		Released	Reschedule Out From 09/30/03 to 06/12/09	1004	FRAME ASSY.	D		09/30/03	10	06/12/09	10	Make	19	-
	•													•	
	✓ Select All     × Select None     ✓ Show Open Items Only          Ø Reschedule Selected ₩0's														
Rea	ady														

Additional columns become visible as your scroll to the right...

4	MRP	Planned	Order Release																
File	Edit	View T	ools Help																
D		🛛 🎒	🖻 🐰 🛍 🖊	• 🧖															
1	. Sea	rch Optic	ons 2. Planned Ord	ers 3. E	xceptio	n Messa	nges												1
		Supplier ID	Supplier Name	Supplier Hold	Lead Time	Qty On Hand	Safety Stock	Order Policy	Order Qty	Order Multiple	Days of Supply	MPS?	Buyer	Planner	Part Class	Sub Class	Part Type	Part Category	
	25	1344	JOE THE PRINTER		8	0	0	F	500	0	0	Γ	PC	RR	A	3	XTR	500	
	26	1344	JOE THE PRINTER	Γ	8	0	0	F	500	0	0		PC	RR	A	3	XTR	500	
	27		JOE THE PRINTER	Γ	8	0	3	Т	0	0	30			RR	В	4	XTR	500	
	28		JOE THE PRINTER		8	0	3	Т	0	0	30			RR	В	4	XTR	500	
	29		JOE THE PRINTER		8	13	0	D	0	0	0			RR	С	9	OL	CAT3	
	4																		
_	<ul> <li>Image: A start of the start of</li></ul>	Select All	Select None			🔽 Sh	o <del>w</del> Ope	n Items	Only			<b>2</b>	Open F	PO: B7		🖋 Res	chedu	le Selecter	IWO's
Rea	dy																	Account: ME	EM05.9

## Tools

## **Supplier Search**

Use this option to locate an existing Supplier record in Manfact's VENDOR file. This screen may be accessed from the **Tools** menu on the Main screen, or by clicking the browse button [...] next to the Supplier Number prompt.

4	🐴 Lo	cate	a Suppl	ier					
1	File E	dit Vi	ew Help						
	Sear	ch Crit	eria —						
			Name: ×	mach*		Buyer		<b>•</b>	
		C	ategory:						
							1		_
		~	Supplier Number	Supplier Name	Phone	Address	Contact	Notes	•
	1		ММ	MAGNA MACHINING		4565 FIRESTONE BLVD. NORWALK, CA 90650		UNLIMITED CREDIT LINE	
	2		1	MATTHEW'S MACHINING	213/615-0311 503\111-3333	2100 E GRAND AVENUE EL SEGUNDO, CA 90254	BOB DRAKE	WAREHOUSE LEASE FOR CALIFORNIA	
								•	-
		✓	Select		<u>S</u> earch	Clear		X Cancel	

This example illustrates how wildcarding may be used to search on a portion of the Supplier Name.

## System Administration

## **Printing Parameters**

This screen is accessed from the File menu and is used to enter parameters for printing Work Order Travelers and Pick-Lists.

Manfa	act Printer	Settings	for PICK	ER.SET				
				F	Printer	Optio	ns	
Port C	Portchars	t <b>ics:</b> Line Printer Width	Line Printer Lenath	Slave Printer Width	Slave Printer Length	Terminal Width	Terminal Length	SETPTR Default
1	1	132	56	132	56	80	24	NHEAD, BRIEF, NFMT, AT HPOFFICE, FC
2	2	132	44	132	56	80	24	NHEAD, BRIEF, NFMT, AT HOME
3	3	133	44	133	56	133	24	NHEAD, BRIEF, NFMT, AT HOME
Out	p <b>ut Destina</b> Line Printer	tion:						
0	Disk	Filename	e: 📔					
0	SETPTR	Command	l:					
					✓	ОК		

## **Company EDI Parameters**

Your company's parameters for both 830 and 850 EDI documents are maintained using the NCC\_BWBAdmin procedure. Although this screen is not accessible directly from NCC\_PLORD, it is included here for reference.

🖣 Manage EDI Values	
General	
N102_BT:	NorthClark Computing, Inc.
N301_BT	PO Box 2096
N401_BT	Oregon City
N402_BT	OR
N403_BT	97045
N104_BT	123456789
EDI 950 - Burchase Ordere	
EDI 030 - Fuichase Orders	
XML850 Doc Path (UNC):	\\PC-7-W2KPR0\C\$\BWB_Data_Store\MDEM05.9\XML Docs\
SEID:	ZZNORTHCLARK
SAID:	123456789
N104_ST:	123456789
EDI 830 - Supplier Forecast	
XML830 Doc Path (UNC):	\\PC-7-W2KPR0\C\$\BWB_Data_Store\MDEM05.9\XML Docs\
Prefix for New PO	×
Hold Code for New PO	A
~	

## **Supplier Options**

Supplier Options													
	File Edit View Tools Help												
	Search Options:												
	Supplie:												
		Supplier ID	Supplier Name	Supplier Hold	SEID	SAID	REID	RAID	EDI 830 Enabled ?	Time Fence	Delete?	•	
	1	1	MATTHEW'S MACHINING	Γ	SEID1	SAID1	REID1	RAID1		0			
	2	2	AMPEX FASTENERS INC	Γ	SEID1	SAID1	REID1	RAID1	~	16			
	3	3	ARMEN SUPPLY COMPANY		SEID1	SAID1	REID1	RAID1		24			
	4												
	↓ ↓												
🗋 Clear 🔍 Search 🔄 Save													
F	Ready									Accou	nt: MDEM0	)5.9 🛛 🎢	

- Supplier ID (Vendor Number)
- SEID
- SAID
- REID
- RAID
- EDI 830 Enabled?
- Firm / Forecast Time Fence

## **Part / Supplier Options**

File       Edit       View Tools       Help         Search Options:       Supplier        Blankett         Part       Description       Supplier        Blankett         Part#       Description       Supplier       Supplier       Blankett         1       1001       MOTOR, 2HP       1       MATTHEW'S MACHINING       P0#       Delete?         2       1001C       MOTOR, 2HP       1       MATTHEW'S MACHINING       150       150         3       2001       HOUSING, MOTOR MACHINED       1       MATTHEW'S MACHINING       7       3       7         4       3504       CLUTCH PLATE       2       AMPEX FASTENERS INC       6       3       B6       1         5       3506       SPRINGS       2       AMPEX FASTENERS INC       6       1       B6       1         7       4501       STEEL ROD .875       1       MATTHEW'S MACHINING       7       2       7       1         8       4502C       CASTING, STATOR       2       AMPEX FASTENERS INC       6       2       B6       1         9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       150       1	🔺 Part / Supplier Options 📃 🗆 🔀											
Part Number:       Supplier       Supplier       Blanket#         Part#       Description       Supplier       Supplier Name       Supplier       Blanket#         1       1001       MOTOR, 2HP       1       MATTHEW'S MACHINING       1       150         2       1001C       MOTOR, 2HP       1       MATTHEW'S MACHINING       7       3       7         3       2001       HOUSING, MOTOR MACHINED       1       MATTHEW'S MACHINING       7       3       7          4       3504       CLUTCH PLATE       2       AMPEX FASTENERS INC       6       3       B6          5       3506       SPRINGS       2       AMPEX FASTENERS INC       6       1       B6          7       4501       STEEL 3X 4X 2       1       MATTHEW'S MACHINING       7       2       7          8       4502C       CASTING, STATOR       2       AMPEX FASTENERS INC       6       2       B6          9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING        150          10       XTR500A       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING	File Edit View Tools Help											
Search Options:           Part Number:         Supplier:          Blankett         POQ#         PO#         PO#         Delete?           1         1001         MOTOR, 2HP         1         MATTHEW'S MACHINING         1         150         1           2         1001C         MOTOR, 2HP         1         MATTHEW'S MACHINING         1         150         1           3         2001         HOUSING, MOTOR MACHINED         1         MATTHEW'S MACHINING         7         3         7         1           4         3504         CLUTCH PLATE         2         AMPEX FASTENERS INC         6         3         B6         1           5         3506         SPRINGS         2         AMPEX FASTENERS INC         7         1         7	D 🖬 🛛 🖨 k 🛍 茎 🗛 - 💡											
Part Number:SupplierSupplierBlankettBlankettPOttDelete?11001MOTOR, 2HP1MATTHEW'S MACHININGII150I21001CMOTOR, 2HP1MATTHEW'S MACHININGII150I32001HOUSING, MOTOR MACHINED1MATTHEW'S MACHININGII150I43504CLUTCH PLATE2AMPEX FASTENERS INC63B6I53506SPRINGS2AMPEX FASTENERS INC61B6I63507I - BEAM STEEL 3X 4X 21MATTHEW'S MACHININGI727I74501STEEL ROD .8751MATTHEW'S MACHININGI62B6I9XTR500POWER DRIVE ASSY.1MATTHEW'S MACHININGI6150I10XTR500APOWER DRIVE ASSY.1MATTHEW'S MACHININGIIIII11IIIIIIIIIII	Search Options:											
Part#         Description         Supplier ID         Supplier Name         Supplier POQ#         Blanket POQ #         PO#         Delete?           1         1001         MOTOR, 2HP         1         MATTHEW'S MACHINING         -         -         150         -           2         1001C         MOTOR, 2HP         1         MATTHEW'S MACHINING         -         -         150         -           3         2001         HOUSING, MOTOR MACHINED         1         MATTHEW'S MACHINING         7         3         7         -           4         3504         CLUTCH PLATE         2         AMPEX FASTENERS INC         6         1         B6         -           5         3506         SPRINGS         2         AMPEX FASTENERS INC         6         1         B6         -           7         4501         STEEL ROD .875         1         MATTHEW'S MACHINING         7         1         7         -           8         4502C         CASTING, STATOR         2         AMPEX FASTENERS INC         6         2         B6         -           9         XTR500         POWER DRIVE ASSY.         1         MATTHEW'S MACHINING         -         150         -           10	Part Number: Supplier: Blanket#											
Part#         Description         Supplier I         Supplier Name         Supplier POQ         Blanket POQ         POQ </td <td colspan="11"></td>												
1         1001         MOTOR, 2HP         1         MATTHEW'S MACHINING         Image: Motor of the state		Part#	Description	Supplier	Supplier Name	Supplier	Blanket	Blanket POQ	P0#	Delete?		
1       1001       MOTOR, 2HP       1       MATTHEW'S MACHINING       1       150       1         2       1001C       MOTOR, 2HP       1       MATTHEW'S MACHINING       7       3       7       1         3       2001       HOUSING, MOTOR MACHINED       1       MATTHEW'S MACHINING       7       3       7       1         4       3504       CLUTCH PLATE       2       AMPEX FASTENERS INC       6       3       B6       1         5       3506       SPRINGS       2       AMPEX FASTENERS INC       6       1       B6       1         6       3507       I-BEAM STEEL 3X 4X 2       1       MATTHEW'S MACHINING       7       2       7       1         7       4501       STEEL ROD .875       1       MATTHEW'S MACHINING       7       2       7       1         8       4502C       CASTING, STATOR       2       AMPEX FASTENERS INC       6       2       B6       1         9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         10       XTR500A       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1		1001		1			FUQ#	Line	150	_		
2       1001C       MOTOR, 211       1       MATTHEW'S MACHINING       1       130       130       1         3       2001       HOUSING, MOTOR MACHINED       1       MATTHEW'S MACHINING       7       3       7       1         4       3504       CLUTCH PLATE       2       AMPEX FASTENERS INC       6       3       86       1         5       3506       SPRINGS       2       AMPEX FASTENERS INC       6       1       86       1         6       3507       I - BEAM STEEL 3X 4X 2       1       MATTHEW'S MACHINING       7       1       7       1       7         7       4501       STEEL ROD .875       1       MATTHEW'S MACHINING       7       2       7       1         8       4502C       CASTING, STATOR       2       AMPEX FASTENERS INC       6       2       86       1         9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         10       XTR500A       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         11           150       1       1       1	1	1001		1	MATTHEW S MACHINING				150			
3       2001       HOUSING, MOTOR MACHINED       1       MATTHEW'S MACHINED       7       3       7       1         4       3504       CLUTCH PLATE       2       AMPEX FASTENERS INC       6       3       86       1         5       3506       SPRINGS       2       AMPEX FASTENERS INC       6       1       86       1         6       3507       I - BEAM STEEL 3X 4X 2       1       MATTHEW'S MACHINING       7       1       7       1         7       4501       STEEL ROD .875       1       MATTHEW'S MACHINING       7       2       7       1         8       4502C       CASTING, STATOR       2       AMPEX FASTENERS INC       6       2       86       1         9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         10       XTR500A       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         11            150       1	2	2001		1	MATTHEW S MACHINING		7	2	7			
4       3504       200 FETER 2       AMEX FASTERERS INC       0       5       500       1         5       3506       SPRINGS       2       AMPEX FASTENERS INC       6       1       86       1         6       3507       I - BEAM STEEL 3X 4X 2       1       MATTHEW'S MACHINING       7       1       7       1         7       4501       STEEL ROD .875       1       MATTHEW'S MACHINING       7       2       7       1         8       4502C       CASTING, STATOR       2       AMPEX FASTENERS INC       6       2       86       1         9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         10       XTR500A       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         11       11       1       1       MATTHEW'S MACHINING       1	3	2001		2			, E	2	PC			
5       3506       SFRINGS       2       AMPEX PASIENCES INC       F       6       1       66       1       66       1       66       1       7       1       7       1       7       1       7       1       7       1       7       1       7       1       7       1       7       1       7       1       7       1       7       1       7       1	4	2500		2			0	3	DC			
6       3007       1**BEAM STEEL 3X 4X 2       1       MATTHEW'S MACHINING       7       1       7       1       7       1<	5	2507		2	MATTHEW/S MACHINING		0	1	7			
7       4301       STEEL ROD 375       1       MATTHEW S MACHINING       7       2       7       1         8       4502C       CASTING, STATOR       2       AMPEX FASTENERS INC       6       2       B6       1         9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         10       XTR500A       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         11       Image: State of the	6	4501	TEEL DOD 075	1	MATTHEW S MACHINING		7	1	7		-	
8       4502C       CASTING, STATOR       2       AMPEX PASTENERS INC.       1       6       2       66       1         9       XTR500       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         10       XTR500A       POWER DRIVE ASSY.       1       MATTHEW'S MACHINING       1       150       1         11       Image: State of the stat		4001	STEEL NUD .073	1			·	2	/ DC			
9     XTR500     POWER DRIVE ASSY.     1     MATTHEW'S MACHINING     1     150     1       10     XTR500A     POWER DRIVE ASSY.     1     MATTHEW'S MACHINING     150     1       11     I     I     MATTHEW'S MACHINING     I     I     I	8	40020	CASTING, STATUR	2	AMPEA FASTENERS INC		ь	2	150			
10 XIRBOUA POWER DRIVE ASST. I MATTHEW'S MACHINING I 150 ]	9	XTR500	POWER DRIVE ASSY.	1	MATTHEW'S MACHINING				150			
	10	XTR500A	PUWER DRIVE ASSY.	1	MATTHEW'S MACHINING				150			
	11										•	
	·											
Clear Q Search Save												

- Part Number
- Supplier ID
- Blanket PO Number

## Security

Access to NorthClark applications is governed by the Manfact security system. The System Administrator must add the appropriate commands to each user's security table. Please refer to the Manfact documentation for more information on setting up security tables.

The following NorthClark procedures may be added to the Manfact security tables:

Routine	Description
NCC_PLORD_VIEW	Allows access for inquiry purposes only. No updates are permitted.
NCC_PLORD	User can release updates to existing Blanket PO's, and may also create new work orders.
NCC_PLORD_BWB	User can create new Purchase Orders to be finalized using BWB.

NCC_PLORD_PO	User can release updates to existing Blanket PO's, but cannot create work orders.
NCC_PLORD_WO	User can create new work orders, but cannot update purchase orders.
NCC_PLORD_ADMIN	User has all privileges, including System Administration.

## **General Information**

## **Export to Excel**

All spreadsheet views are equipped with the option to Export to Microsoft Excel. Click on the spreadsheet your wish to export, then choose the Export to Excel option from the menu or toolbar.

🐯 Export "MRP Planned Order Release" to Excel 🛛 🛛 🔀									
Export <u>M</u> ethod									
Export Directly to Excel									
Sheet Name: Sheet1									
C Export to File in Excel Format  Generate Warning List									
Save As File Name:									
C:\Documents and Settings\Administrator\Local Settings\									
Export Include <u>H</u> eader <u>X</u> Close									

## Export to Excel or to a File?

You may export the contents of the display directly to Excel, or you may choose to create a file in Excel format.

#### Sheet Name

Enter the Excel sheet name to create. This will automatically default to Sheet1.

#### Save As File Name

Enter the pathname of the file you wish to create. You may Browse the files by clicking the button to locate the drive and folder where the file will be stored.

#### **Generate Warning List?**

Select this option to create a log file. The log file contains error messages and other information about how your Excel file was created. The name of the log file is "CreateExcelFile.log", and it will be stored in the same folder as your spreadsheet.

## Include Header

Check this box to export the column headings.

## **Export Button**

Click this button to export your data to Microsoft Excel.

## Print a Spreadsheet

All spreadsheet views are equipped with a Print feature. Click on the spreadsheet you wish to print, then choose the Print option from either the menu or the toolbar.

🖨 Print "MRP Planned Order Release"		×
1 - Reset to Default 2 - Select All Columns 3 - Select No Columns		
I - Reset to Derault       2 - Select All Columns       3 - Select No Columns         Bange       Orientation       Include         Image       Image       Image         Image       Image       Image	Columns to Print: Release     Status     Make Buy     Part#     Description     Part Rev     Part Hold     Required Date     Required Qty     New Date     New Qty     Order Notes     Planner Notes     Supplier ID     Supplier Name	
Header 2: NCC_PLORD Header 3: Footer: Print Preview X Close	<ul> <li>Supplier Hold</li> <li>PO / W0#</li> <li>EDI 830?</li> <li>Firm / Fost?</li> <li>Lead Time</li> <li>Qty On Hand</li> <li>Safety Stock</li> </ul>	~

#### Range - Selecting a Print Range

You may choose to print the entire spreadsheet (all), selected cells (those that you have highlighted on the current screen), the current page (only the rows that are currently visible on your screen), or a range of page numbers.

#### **Orientation - Portrait or Landscape**

You may print your report in portrait mode (normal) or landscape mode (sideways). Printing in landscape mode will allow you to fit more columns of information on your report.

## Margins - Report Margins

You can make your report more attractive by setting the top, bottom, left, and right margins. Reduce the left and right margins if you need to fit more columns on the report.

### Units - Inches or Centimeters?

Are the margins you entered expressed in inches or centimeters?

#### Page Order

If your report is too wide, it may span multiple pages. When this occurs, do you want the report printed from top to bottom or left to right?

#### What Do You Want to Print?

You can customize the appearance of your report by printing (or not printing) column headers, row headers, grid lines, borders, shadow, and color.

#### Headers and Footers

Your report may have up to three lines for the heading, and one line for the footer. The system initially displays a default heading, which you may modify if desired.

*Tip*: Use /p to designate a page number.

#### Which Columns Do You Want to Print?

The columns that are available for printing are listed. Select the columns you wish to include on your report.

## **Arranging / Hide Columns**

Use this view to change the sequence in which columns appear on your spreadsheet.

4	🔺 Arrange Columns - MRP Planned Order Release															
	🗹 S	ho <del>w</del> Hidd	en Colu	mns												
		Release	Status	Make Buy	Part#	Description	Part Rev	Part Hold	Required Date	Required Qty	New Date	New Qty	Order Notes	Planner Notes	Supplier ID	9
	Show		~	•	•	~	•	<b>V</b>	~		•	<b>v</b>	~	<ul><li>✓</li></ul>	<b>v</b>	Ţ
										۱.						
	Select a Column to Move         << Move First       < Move Left       Move Right >       Move Last >>															
Number of Columns to Freeze: 0 🕂																
✓ □K     × □ancel     K Reset to Default     Number of Rows to Freeze:										•						

Each column represents a field that is available for display on the spreadsheet. To hide a column remove the check from the box under the title heading. Use the [Move First], [Move Left], [Move Right] and [Move Last] Buttons to re-arrange the order in which the fields appear on the specific screen Display. Click [Reset to Default] to return to the system's default settings. Select the Number of Columns and Rows you with to Freeze on the Display. Note, these settings are stored in the Windows Registry for each user.

## Wildcarding

Wildcarding is a powerful feature that allows you to search using a portion of the field. You tell the system you want to use a wildcard by typing three periods "…" or an asterisk "\*" at the beginning or end of your search entry. You can also use "+" and "," to include and/or conditions. Here are some examples of search commands and their expected results:

AAA or *AAA*	Search for the word "AAA" anywhere in the field
*AAA*+*BBB*	Both "AAA" and "BBB" must appear in the field
*AAA*,*XXX*	Either "AAA" or "XXX" must appear in the field
AAA*	The field starts with "AAA"



## ERP Consulting, Web Development, Custom Programming Solutions, Web & Desktop Applications for Manfact

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