# Build 394 Installation Changes

## Installation wizards all replaced with new versions

All DBA installation wizards -- product installation/update, new client installation, and training company installation – have been replaced with new wizards that further simplify installation and make DBA current with the latest Microsoft Windows OS changes, including Windows 10.  Take note that product updates and new system installation are now both handled by a single exe named *DBAManufacturingxxx.x.x.exe* (where *xx.x.x* is the build number).

## Windows XP new Client Installation no longer supported

Existing DBA client workstations on Windows XP will continue to function as is, but support for Windows XP is not available for new client installation.  Client uninstall/reinstall is not required to update your system.  Do not uninstall any client workstations because you will not be able to reinstall Windows XP workstations.

## WARNING: Windows 2003 Server no longer supported

Microsoft no longer supports Windows 2003 Server and therefore an operating system update will be required to install this and future product updates.

## NOTE: Microsoft .NET Framework 4.5.2 Required for installers

All installation wizards require the .NET Framework version 4.5.2, which may require an upgrade with Server 2008 or any new Vista and Windows 7 workstation clients that get installed.  If the installation wizard hangs during the process it is an indicator that you need to update your .NET Framework. A free download to .NET Framework version 4.5.2 is available from Microsoft.

# Release Notes – Build 394

Build 394.5.1 - Released June 30, 2016

## Contents

## Overview

The short definition of manufacturing efficiency is to fulfill customer orders quickly and reliably using the least amount of inventory and WIP possible.

This latest version of DBA is focused on significant enhancements to MRP and shop control, which are the drivers of your manufacturing efficiency. Accompanying these enhancements is an entirely new set of user guides to help you get the most out of your DBA system and realize your full efficiency potential.

**The Master Schedule**

DBA is a fully integrated MRP system.  MRP replaces manual planning and expediting with a coordinated self-adjusting master schedule that provides total control over your workflow processes.

Even more so than in past versions, the master schedule is now the primary driver of production processes.  It establishes sales order required dates, determines when jobs are released to production, and assigns job priority out on the shop floor.  The following changes have been made to enhance the integrity and effectiveness of the master schedule:

- In order to provide perfect multi-level alignment within MRP generation, the M item *Lead Days* allocation is now automatically determined by the longest lead time among each item's to-order components.

- In order to properly time-phase job and PO generation for items made or purchased to a forecast, the *Reorder Point* (formerly *Reorder Level*) is

now dynamically calculated from a *Monthly Forecast* amount and the item's *Lead Days* and *Job Days* allocations.

- In order to make the master schedule self-adjusting, job finish dates are now automatically rescheduled relative to release dates when jobs are released to production. A new material allocator only flags jobs for release when material is fully available for all job components.

The master schedule is generated by MRP. To use MRP, you only need to focus on five common sense item settings – the *Lead Days*, *Job Days*, *Order Policy*, *Monthly Forecast*, and *Supply Days* -- that capture what you already intuitively know about the items you make and buy.

**Item MRP Settings**

The *MRP Settings* screen has been significantly enhanced to make it easy for you to focus on the five basic settings that generate the master schedule.

A new 'To Order' *Order Policy* setting enables you to designate when items are to be made or purchased to order, in which case MRP will generate a job or PO whenever new demand materializes.

A new 'Forecast' *Order Policy* setting enables you to designate when items are to be made or purchased to a forecast. In the *Order Policy* screen you enter a Monthly Forecast amount, which calculates a *Reorder Point* for you that triggers job or PO generation.

The *Reorder Point* is now accompanied by a new *Supply Days* setting that designates the number of days of forecast demand that is to be covered by each job or PO quantity. The *Supply Days* target determines the size and frequency of your jobs and POs and puts a cap on peak stock quantities. It is also very useful for purchasing extremely long *Lead Days* items and for creating demand-driven POs at regular intervals instead of using blanket POs.

M item *Lead Days* allocations are now automatically determined by the longest lead time among each item's 'To Order' policy components. You can shorten an item's time to shipment by changing long lead time component order policies to 'Forecast' to remove them from the *Lead Days* allocation.

A new *Review Note* can be used to enter special planning instructions that are displayed during MRP generation. A planned job or PO cannot be converted until the *Review Note* is opened and confirmed.

As a result of item MRP settings, sales order required dates are synchronized with MRP generation and serve as accurate and reliable target shipment dates that can be furnished to customers.

**MRP Generation**

An all-new *MRP* screen rapidly generates jobs and POs in a single multi-level batch process and incorporates them into a master schedule where all supply dates are coordinated with demand dates.

Each MRP run begins by generating jobs from sales order lines for one-off, custom items. Jobs are then generated in response to net demand, first for selling items, then level by level for subassembly items according to each item's lowest level among its product structures.

A new *Split Job* function enables a planned job to be split into two or more planned jobs if needed to accommodate machine capacity limitations or other purposes.

Each MRP run is finalized with PO generation. Supplier prices can now be fully managed within MRP with no need for PO editing after conversion.

## Job Release

Job scheduling is now handled by MRP and the job release process. Jobs can no longer be released upon creation or rescheduled manually prior to being released.

The master job schedule now gets automatically adjusted when jobs get released to production in the *Job Release* screen within the *Job Control Panel*. A new material allocator determines job release based on material availability that can vary depending on actual receipts of purchased components and subassemblies. As each job gets released, it is given a new finish date relative to its released date.

The result is that all jobs that are in production are fully covered by material and are included in work center queues.

A new prompt also enables job travelers to be batch printed for each set of newly released jobs.

## MRP Activation Wizard

The new job release process only works properly when it is combined with a master schedule generated by MRP. MRP only works properly when all your P items have a realistic *Lead Days* allocation and all your M items have a realistic *Job Days* allocation. It is also highly beneficial to plan your times to shipment using item order policies.

To help you get item MRP settings properly established, an *MRP Activation Wizard* has been added as a front-end to the new *MRP* screen. This wizard steps you through required item settings and provides tools that help you focus on the items that need attention. Once the wizard steps are flagged as completed, you can then activate and start using the new *MRP* screen.

## Shop Control

The *Work Center Schedule* screen is used for shop control and has been significantly improved. Sequences are now sorted in job priority order based on each job's remaining production time relative to its required date. This automatically expedites jobs through the shop and eliminates inefficient manual expediting.

An improved *Material* icon now clearly indicates when material is needed and launches the *Job Issues* screen so that material can be issued to jobs in real time. Real time inventory is essential for meaningful stock status, stock counts, and other inventory processes.

You can now change the sequence status to 'Started' as you assign sequences to workers so that you know which sequences are in progress. The *Labor* icon launches the *Job Labor* screen so that job sequence status can be updated as workers finish their assignments.

Real time material and labor updating are essential for manufacturing efficiency. With real time processing you always know the current condition of work center queues and what needs to be run next within each work center. Job receipts can be made immediately without any delay to account for material and labor-related costs.

**Job and PO Tracking**

Your ability to track open jobs and POs is significantly improved. The *Job Schedule* is now split into separate screens for 'Released' status jobs in production and 'New' status jobs waiting to be released to production. A new *Dependencies* inquiry can be used to assess the impact of late jobs relative to dependent sales orders.

The *PO Schedule* can now be filtered so that you can focus on PO lines that are past their required dates. A new *Dependencies* inquiry enables you to assess the impact of late POs on dependent jobs.

**Custom Manufacturing**

The process workflow for one-off custom items has been improved. The *One-Off Item Generator* now provides the ability to originate a one-off item and BOM from a "model" BOM. You are prompted to always create one-off items within a quote so that MRP takes no action until the one-off BOM is fully customized. After BOM customization is completed and the selling price established, the quote is converted to a sales order, at which time the program now updates the sales order required date to properly drive CTO job generation.

**New Manufacturing Efficiency Guide**

The *Manufacturing Efficiency Guide* has been totally revised and now focuses on the six basic steps you can take to dramatically improve your manufacturing efficiency.

**New Workflow Guides**

MRP and shop control are the drivers of your manufacturing efficiency. Our *Manufacturing Efficiency Guide* has been totally revised and explains what manufacturing efficiency is and how it can be achieved in six basic steps.

DBA is designed with a "Total Control" process workflow that provides total software control over all essential manufacturing processes. Each of the eight workflow phases now has its own user guide with introduction, benefits, why needed, overview, setup, processing, rules, and common questions chapters.

You will find each of these guides on a new *Education* option at the end of each major menu to which the guide applies.

**New Training Guide**

This new guide covers user training tasks, which are listed in their recommended order of completion.  The guide includes live links to training videos and workflow guides.

User training is done in the Sample Company so that data can be freely entered without affecting live operations.  Users will work with data that demonstrates proper setup and use of the system and in the process may get inspired to make improvements to previous setup tasks.

**New Startup Guide**

This new guide covers system startup tasks, which are listed in their recommended order of completion.  This guide is a companion resource to the *Startup Wizard* screen, which is only accessible within new systems that have not yet been activated.  Each task in the *Startup Wizard* links to a corresponding topic in this guide.

Once your system is activated or has live transactions, the *Startup Wizard* is no longer accessible.  If your system is not properly implemented and you wish to follow the wizard tasks to get back on track, you can follow this guide and track your completion progress manually.

**DBA Help Redesign**

*DBA Help* has been redesigned and now includes live videos, screen shots, and links to workflow guides, the *Manufacturing Efficiency Guide*, the *Training Guide* and *Startup Guide*, and technical guides for data import, product updates, and system installation.

# System Administrator Task List

## Pre-Installation Recommendations

### Obtain support subscription

We do not advise installing an update without a support subscription. Besides being able to submit support tickets, a support subscription gives you access to the "Training Company" option described below. A support subscription also enables your users to review the video training courses listed at the end of this document.

### Preview training company

With each new product build we recommend that you install our "training company" option before you apply the product update. This is especially beneficial with build 394 because it has so many new features.

The training company option enables you to install a special "preview" version of build 394 on your server which uses a copy of your database. The training company enables users to explore the new release in advance, with the ability to make actual entries on your own data, before you apply the update to your live system.

The training company installation file can be downloaded from the "What's New" area of the support center.

### Review the new user guide series

A new set of user guides covers our "Total Control" process workflow. Each of the eight workflow phases now has its own user guide with introduction, benefits, why needed, overview, setup, processing, rules, and common questions chapters. In particular we recommend reviewing the *MRP Guide* and *Shop Control Guide* because of the many new improvements made to these two workflow phases. Each user guide is located on a new *Education* sub-menu within its associated main menu and can also be accessed within *DBA Help*.

### Review new guideline videos

Four new screens – *Videos - BOM Guidelines*, *Videos - Custom Manufacturing Guidelines*, *Videos - MRP Guidelines*, and *Videos - Shop Control Guidelines* – present users with sets of guidelines that must be followed for the system to work properly and maximize your manufacturing efficiency. Each screen is located on a new *Education* sub-menu within its associated main menu.

### Review resolved programming issues

A list of resolved programming issues in build 394 is available in the "What's New" area of the support center.

## Post-Installation Tasks

### Complete the MRP Activation Wizard

An *MRP Activation Wizard* has been added as a front-end to the all-new *MRP* screen. This wizard steps you through required item settings and provides tools that help you focus on the items that need attention. Once the wizard steps are flagged as completed, you can then activate and start using the new *MRP* screen.

### Review Build 394 FAQ

Build 394 includes significant enhancements to production planning that can dramatically improve your manufacturing efficiency. A *Build 394 FAQ* paper is available as a companion piece to these release notes. This paper explains in FAQ format what changes have been made and how to adapt your processes to fully benefit from them.

Go to *Program Updates / What's New – Build 394.0.1 Update Available – Build 394 FAQ* to access this paper in the online support center.

### Conduct User Training

The new *Training Guide* provides a formal approach to user training that can benefit new and experienced system users. We suggest that all users go through the training tasks to gain a thorough understanding of workflow processes and how they can be used to boost manufacturing efficiency.

### Check for INVALID-WC work center and fix associated processes

The system update performs a data integrity check on the work center IDs used in all your BOM and job routing sequences. If any invalid work center IDs are detected, an INVALID-WC work center is created and replaces any invalid work center IDs in the affected BOM and job routing sequences.

If you see that an INVALID-WC has been created in the *BOM – Work Centers* screen, you can fix the affected routing sequences as follows. Go to the *BOM – Process Replace* screen and replace the work center against each process associated with the INVALID-WC work center. This will replace the invalid work center with the valid work center in all sequences associated with that process. After all such processes have been replaced, go to the *BOM – Work Centers* screen and inactivate the INVALID-WC work center.

# Build Naming Convention (New)

From this point forward DBA updates will now be identified with a new build naming convention.  For example, here is the current build number:

**394.0.1**

The build number consists of three digital segments:

**Segment 1 = Build Number**
The first segment identifies the 3-digit build number.  Each build is a major release with significant new product features.  A build typically requires administrator tasks and includes new educational materials.

**Segment 2 = Service Pack Number**
The middle segment identifies a single digit service pack number.  A service pack is a minor release with product improvements.  Service packs typically do not require administrator tasks.

**Segment 3 = Hotfix Number**
The final segment identifies a single digit hotfix number.  A "hotfix" release consists of one of more high priority bug fixes.

# New Features

## Stock Status Inquiry

(*Stock Items – MRP – Job Schedule – PO Schedule*)

### Summary Tab

The *MRP Settings* panel now includes new fields for the item *Order Policy*, *Monthly Forecast*, and *Supply Days* settings.

### Projected Tab

The *Projected* tab has been enhanced to improve visibility of supply and demand events.  If the inquiry is launched against a particular job or PO, gray shading is applied to that job or PO line in the grid.  A job or PO number in the *Source* column can be clicked to open and view its details within the *Job Schedule* or *PO Schedule* screen.  A new *Job Status* column indicates whether a job is NEW or RELEASED.  NEW status jobs with past planned start dates are now displayed with dates that are forward scheduled from the current date.

### Job Outputs Tab

A new *Job Status* field has been added as well as an active link in the *Job No* field that opens the *Job Schedule* screen to view job details.

### Job Inputs Tab

A new *Job Status* field has been added as well as an active link in the *Job No* field that opens the *Job Schedule* screen to view job details.  A new *Work Center* field indicates the work center to which the item is to be issued.

## Stock Transfer

(*Inventory – Stock Transfer*)

The screen can now be filtered by a single item, showing all locations containing that item, or it can be filtered to a single location, showing all items within that location.  Within a location, a new *Transfer to Single* button pre-fills the destination location against all items with a single location.  A new *Transfer to Primary* button pre-fills the destination location with each item's primary location, which is particularly useful when items are received first to an inspection and labeling location and are then mass-transferred to primary locations.

## Stock Counts

(*Inventory – Stock Counts*)

If a count is entered against an item that has one or more inventory transactions since the stock count was created, a red *Error* icon is displayed.  When clicked, a message explains that because transactions have occurred, the count cannot be posted for this item.  This protects the integrity of the stock count because quantities must be frozen until the stock count is completed.

## Inventory Control Guide (New)

(*Inventory – Education – Inventory Control Guide*)

This new user guide explains how to use inventory control in its entirety, all within a single reference source. It is organized into these chapters:

Introduction
Why You Need Inventory Control
Total Control Overview
Inventory Control Elements
Locations
Lot/Serial Control
PO Receipts
Job Receipts
Stock Transfers
Job Issues
Order Picking
Stock Counts
Stock Adjustments
Sources of Chronic Problems
Fixing a Broken Inventory
Inventory Value
Inventory Control Guidelines
Common Questions

## Bill of Manufacturing Guide (New)

(*BOM – Education – Bill of Manufacturing Guide*)

This new user guide explains how to use the bill of manufacturing in its entirety, all within a single reference source. It is organized into these chapters:

Introduction
Why You Need a Bill of Manufacturing
Total Control Workflow
Bill of Manufacturing Elements
Stock Items
Work Centers & Machines
Subcontractors
Standard Processes
Product Structures (Subassemblies)
BOM Types
Revisions
Attaching Documents and Web Links
Routings
Components (Bill of Materials)

Outputs
Product Costing
Batch Manufacturing
Bill of Manufacturing Guidelines
Common Questions

## Custom Manufacturing Guide (New)

(*BOM – Education – Custom Manufacturing Guide*)

This new user guide explains how to use DBA for all aspects of custom manufacturing.  It is organized into these chapters:

Introduction
Why You Need Custom Manufacturing
Total Control System Workflow
Custom Manufacturing Sequence of Events
Advance Setup – Standard Processes
Advance Setup – Model BOMs
Phase 1 – Quote Entry
Phase 2 – One-Off BOM Customization
Phase 3 – Quote Conversion
Phase 4 – Job Generation and Processing
Repair Jobs
Remanufacturing
Disassembly
Rework
R & D
Custom Manufacturing Guidelines

## Videos – BOM Guidelines (New)

(*BOM – Education – Videos - BOM Guidelines*)

These new videos step you through a set of sequential guidelines that must be followed for bills of manufacturing to work properly and help you maximize your manufacturing efficiency.

## Videos – Custom Mfg Guidelines (New)

(*BOM – Education – Videos - Custom Mfg Guidelines*)

These new videos step you through a set of sequential guidelines that must be followed for custom manufacturing to work properly and help you maximize your manufacturing efficiency.

## Quotes

(*Sales – Quotes*)

### One-Off Item Generator

A new *BOM Copy* option enables a one-off item and BOM to be copied from an existing BOM. The one-off BOM can then be customized for this particular order. The screen encourages one-off items and BOMs to be generated within quotes so that MRP takes no action while BOM customization takes place.

### Quote Conversion

After the one-off BOM details are finalized and a selling price established, the quote is converted to a sales order to initiate a job. During conversion the item's *Required* date is now forward scheduled from the current date to provide an updated date for CTO job generation.

## Sales Orders Guide (New)

(*Sales – Education – Sales Orders Guide*)

This new user guide explains how to use sales orders in its entirety, all within a single reference source. It is organized into these chapters:

   Introduction
   Why You Need Sales Orders
   Total Control Workflow
   Sales Orders Overview
   Sales Setup
   Order Entry
   Order Picking
   Shipping
   Invoicing
   Credit Memos
   Quotes
   RMA Processing
   Sales Order Guidelines
   Common Questions

## MRP Defaults

(*MRP – MRP Setup – MRP Defaults*)

### Lead Days Generator

Formerly, using the *Lead Days Generator* was an optional setting. As was indicated in the previous build's release notes, this is now a standard feature, which means that each M item's *Lead Days* allocation is now made equal to the longest lead time among its to-order components. This provides for perfect multi-level date alignment during MRP job generation.

### MRP Interval

Formerly, a large number could be entered in this setting, even though it was not recommended. As was indicated in the previous build's release notes, this setting is now capped at 7 shop days. This setting is used to expand each item's planning period to account for the number of shop days between MRP runs.

### Overlap removed

The *Overlap* setting has been removed so that all master schedule dates are end-to-end.

## MRP Settings

(*MRP – MRP Settings*)

### M Item Lead Days

The M item *Lead Days* allocation is now updated by the *Lead Days Generator* and is no longer a manual entry. It is made equal to the longest lead time among each item's to-order components, which provides for perfect multi-level date alignment during MRP job generation.

### Reorder Point

The *Reorder Level* field has been renamed and is now the *Reorder Point*. This more accurately describes its purpose, which is to serve as a calculated trigger point for job or PO generation. This value is now calculated within the *Order Policy* screen and is no longer directly entered.

### Order Policy

A new *Order Policy* field identifies the planning method used for each item. A 'To Order' value means that the item is made or purchased to order. A 'Forecast' value means the item is made or purchased relative to a forecast-derived *Reorder Point*.

### Order Policy Screen

The *Reorder Calculator* screen has been renamed and is now the *Order Policy* screen and includes these enhancements:

- You now indicate the item's *Order Policy*, which can be 'To Order' or 'Forecast'.

- If 'Forecast' is selected, monthly *Sales*, *Usage*, and a *Safety Factor* are entered. A new *Std Dev* field displays the statistical standard deviation to assist with the *Safety Factor* setting.

- The *Reorder Point* is now calculated using the monthly forecast and item planning period. This value is now dynamically recalculated whenever the item's planning period changes.

- You can now indicate whether the *Min Order* is to be a manual entry or is to be calculated using the *Supply Days* setting.

**Review Note**

A new *Review Note* can be used to enter special planning instructions that are displayed during MRP generation.

### How it is used in MRP

Each planned job generated by MRP represents a minimum action profile. An item may have special production requirements, however, that go beyond the minimum action profile. For example, a planned job may have to be split and quantities rounded to conform to machine batch sizes. Any such special requirements can be documented with a *Review Note* that gets included with each planned job during MRP generation. A planned job cannot be converted until its *Review Note* is read and confirmed.

## MRP

(*MRP – MRP*)

An all-new MRP screen now generates jobs and POs in a single process that runs fast and efficiently.

### Activation Wizard

An *MRP Activation Wizard* has been added as a front-end to the all-new *MRP* screen. This wizard steps you through required item settings and provides tools that help you focus on the items that need attention. Once the wizard steps are flagged as completed, you can then activate and start using the new *MRP* screen.

### Multi-Level Generation

Each MRP run is processed in multi-level order, starting with job generation for CTO items, followed by job generation for standard sell items, job generation for subassemblies in lowest BOM level order, and ending with PO generation.

### Session No

Each MRP run is now identified with a *Session No*. The screen can be closed mid-way through a session and a *Continue* button used to resume generation at the stopping point.

### Master Schedule Dates

Master schedule dates – job *Planned Start*, *Job Finish*, PO *Due Date* – are now determined solely by item settings and can no longer be manually edited.

### Split Job Screen

A planned job can now be split into two or more planned jobs using a new *Split Job* screen. Jobs are typically split to accommodate a capacity limitation associated with a particular machine or job resource.

**Display – No Action Needed**

A *Display – No Action Needed* setting in the upper panel can be selected within a given level to list items with future requirements (net demand below *Reorder Point*) outside of current item planning periods, in which case no planned job or PO is needed at this time. MRP will generate a planned job or PO in a future session when the *Required* date falls within the item's current planning period.

**Review Note**

A new *Review Note* can be used in the *MRP Settings* screen to enter special planning instructions that are displayed during MRP generation. A job or PO cannot be converted until the *Review Note* is opened and confirmed.

**Job Conversion**

To insure the integrity of multi-level generation, all jobs must now be converted at each level of generation in order to advance to the next level.

**PO Details**

New supplier, pricing, and manufacturer fields enable all PO details to be established and finalized within MRP instead of editing the actual purchase order. To insure the integrity of inventory costing, a purchase price is now required unless a zero value price is deliberately entered.

**PO Conversion**

The PO level screen can be filtered by supplier so that POs can be converted one supplier at a time, if desired.

## MRP History (New)

(*MRP – MRP History*)

This new screen provides a complete history of your MRP sessions, including the generation date and completed date, the number of planned jobs and POs generated, the number of actual jobs and POs converted, and whether the session was fully completed or not.

## MRP Guide

(*MRP – Education – MRP Guide*)

This user guide has been completely revised and explains how to use MRP in its entirety, all within a single reference source. It is organized into these chapters:

Introduction
Why You Need MRP
Total Control Workflow
MRP Overview
M Item Settings
P Item Settings

Sales Order Required Dates
MRP Generation
The Master Schedule
MRP Guidelines
Common Questions

## Videos – MRP Guidelines (New)

(*MRP – Education – Videos - MRP Guidelines*)

These new videos step you through a set of sequential guidelines that must be followed for MRP to work properly and help you maximize your manufacturing efficiency.

## Job Reopen (New)

(*Jobs – Jobs Setup – Job Reopen*)

Closed jobs are now reopened in this new screen instead of directly within the *Jobs* screen.  A dedicated screen is needed because this process generates GL transactions to *WIP* and *WIP Adjustments* and must be subject to the financial cutoff date and require password access.

## Job Types

(*Jobs – Jobs Setup – Job Types*)

### Default Status Removed

The *Default Status* setting has been removed.  All jobs are now created with a status of 'NEW'.  Jobs are now changed to 'RELEASED' only within the *Job Control Panel* so that the material allocator process can be applied (see next).

## Job Control Panel

(*Jobs – Job Control Panel*)

### Material Allocator

Whenever the screen is launched, a batch process allocates component stock on hand to all open jobs.  When a red icon and 'Shortage' is displayed in the *Material* field, it means that the job is at or past its *Planned Start* date, but one or more of its components is not fully allocated and job release must be delayed. Clicking the down arrow in the *Material* field displays a list of the non-available components.

### Stock Status Inquiry

The *Stock Status* inquiry has been added to the *Release Jobs* screen.

### Job Rescheduling

At time of job creation, the number of job days between the planned start date and finish date is stored. When a job is released, it gets assigned a *Released* date, which is considered to be the job's actual start date for analysis purposes. The *Job Finish* date is automatically forward scheduled from the *Released* date by the stored job days to update the master schedule with a realistic supply date.

### Traveler Printing

Instead of printing job travelers prior to actual release, you now release jobs first and then you are prompted to print travelers for that set of newly released jobs. This enables the *Released* date and updated *Job Finish* date to be printed in the header instead of the *Planned Start* date and original *Job Finish* date.

### Subcontract Sequence Tracking

A new *Subcon* checkbox and link to the *PO Schedule* screen have been added to the *Seq Status* inquiry in the *Work in Process* screen to clearly identify subcontract routing sequences and provide drill-down status.

### Status

All jobs listed in the *Work in Process* screen have a *Status* of 'RELEASED'. You can click the icon in the *Status* field to change the status. You are given three possible options:

- If no transactions have yet occurred and you do not wish the job to be released at this time, you can change the status from 'RELEASED' back to 'NEW'.

- If no transactions have yet occurred and you wish to cancel the job, you can change the status to 'FINISHED' so that the job can be closed in the *Close Jobs* screen.

- If transactions have occurred and you attempt to manually change the status to 'FINISHED', you are warned that you are finishing the job incomplete and you will receive messages indicating which transaction types are incomplete. Manually changing the job status should be a rare exception because the status automatically changes to 'FINISHED' when the final receipt is made and all inputs have transactions.

## Job Schedule

(*Jobs – Job Schedule*)

This screen has been extensively revised to provide greater visibility of the master job schedule.

### No manual intervention required

The *Job Schedule* is initially generated by MRP and is updated when jobs are released to production in the *Job Control Panel*. Dates are determined by item

*Lead Days* and *Job Days* allocations and when jobs are released. The only date that can be edited is the *Job Finish* date against RELEASED jobs.

**Split Screen**

The screen is now split into separate grids for RELEASED and NEW status jobs. RELEASED jobs are in production and can be monitored relative to dependent demand events. NEW status jobs are waiting to be released to production and can be monitored relative to planned start dates.

**NEW and RELEASED Job Fields**

### Required Date

Each job's *Required* date is now dynamically updated each time the screen is launched, based on the job's *Demand Type*.

### Demand Type

A new *Demand Type* field displays the demand type associated with the *Required* date, which can be 'CTO', 'Sales Order', 'Job', or 'To Stock'.

### Dependencies

The icon in the new *Dependencies* field, which launches the *Supply Dependencies* inquiry, becomes visible when the job is scheduled to finish late relative to dependent demand events. Dependent demand events are sales orders or jobs with demand dates earlier than the *Job Finish* date or the current date.

#### The supply job may still finish on time

Even though the supply job has a *Days Past Req* value, it does not mean that the job will definitively miss its *Required* date. A job running behind schedule automatically receives higher priority in work center queues, which reduces waiting time and may enable the job to be finished earlier than its *Job Finish* date.

#### Dependent Sales Orders

Sales order lines listed in the *Supply Dependencies* inquiry will be late for shipment if the supply job is not finished by its *Required* date. If you conclude that the supply job has no chance of being finished on time, you may wish to inform the customer when shipment is likely to be made.

> NOTE: When shipment is likely to be delayed, never change the sales order line *Required* date. It must be left as is to give the supply job high priority in work center queues and to give the sales order high priority within the *Shipment Planner* in the *Order Picking* screen.

#### Dependent Jobs

Jobs listed in the *Supply Dependencies* inquiry will be delayed for release to production if the supply job is not finished on time. No action is needed

because dependent jobs that are released late will automatically receive higher priority in work center queues and may still be finished by their required dates.

### MRP Session

A new *MRP Session* field displays the MRP session number from which each job was generated.  If the job was created manually, 'Manual' is displayed.

## RELEASED Job Fields

### Job Finish

The *Job Finish* date can be changed using the lookup calendar, if desired, and is now the only date in the master job schedule that can be manually changed.

### Priority

A new job *Priority* field is used within work center queues to determine the optimal order in which job sequences should be performed.  The clock icon in this field launches the *Remaining Job Days Calculator*, which displays the details behind the calculation.

## NEW Job Fields

### Days Past Start

A value in this field means that the current date is 'X' shop days past the job's *Planned Start* date, which indicates a delayed job release.

### Material

Whenever the grid is launched, a batch process allocates component stock on hand to all open jobs.  When a red icon and 'Shortage' is displayed in the *Material* field, it means that the job is at or past its *Planned Start* date, but one or more of its components is not fully allocated and job release must be delayed.  Clicking the down arrow in the *Material* field displays a list of the non-available components.

### First WC

This field identifies the job's first work center.  The icon can be clicked to view the work center queue days and buffer days or subcontract process details.

### Earliest Finish

This new read-only field displays the job's finish date if the job were to be released today.  If the *Planned Start* date is equal or later than today's date, this is equal to the scheduled *Job Finish* date.  If the *Planned Start* date is earlier than today's date, this is forward scheduled from today's date by the number of job days allocated at time of job creation.

## Work Center Schedule

(*Jobs – Work Center Schedule*)

This screen was formerly the *Shop Control Panel* and has been renamed to more accurately describe its purpose.

**Screen Loading Time**

The *Queue Days* and *Remaining Job Days* calculations are now significantly faster to reduce screen loading time.

**Schedule Tab**

*New* status sequences are no longer included in the schedule grid because associated jobs are not yet released to production.

**Total Load**

A new *Total Load* panel in the header of the *Schedule* tab displays the work center's *Load Hours* and *Load Days* and includes an icon that launches the *Load Inquiry*, which lists all job sequences for new and released jobs so that you can assess the total load or job backlog against the work center.

**Order**

This new field is the suggested order in which job sequences should be performed. Sequences are sorted by *Status* in this order – 'Started', 'Ready', and 'Next' – and then by ascending *Priority* value within *Status*.

**Priority**

This new field displays the job *Priority* value, which determines the optimal order in which job sequences should be performed. It is calculated as follows:

Shop Days to Required – Total Remaining Sequence Days = Priority

A negative value means that the job is running behind schedule relative to its *Required* date. Within each sequence *Status*, job sequences are listed in ascending *Priority* order so that jobs running behind schedule get priority over jobs running even or ahead of schedule.

You can click the clock icon to the right of the *Slack to Req* field to launch the *Remaining Job Days Calculator*, which displays the *Priority* calculation and underlying job details.

**Sequence Status**

The sequence *Status* can now be manually changed to 'Started' as workers are given new assignments to indicate that the sequence is in progress.

You can also manually change the *Status* from 'Next' to 'Ready' to accommodate sequences that are run in parallel with a sequence that is still in progress in a previous work center.

**Next WC**

Subcontractor work centers are now included in this field to indicate when the next sequence is to be performed outside the shop.

**Material**

This relocated and improved field enables real time inventory updating as material gets issued to jobs. It indicates the status of job detail lines assigned to this sequence. You can click the icon to launch the *Job Issues* screen, which is pre-filled with the job detail lines assigned to this sequence, as well as any job detail lines for previous sequences that have remaining quantities.

**First Seq**

If this is the job's first sequence, this new checkbox is selected. When it is the first sequence, the job has not actually been started and therefore there is no work in process staged in the work center queue. On the other hand, when it is not the first sequence, work in progress exists and occupies staging space in the work center queue.

# Jobs

(*Jobs – Jobs*)

**Status**

The job *Status* can no longer be changed directly within this field. A new *Change* link is visible when the user has security access to the *Job Control Panel*, which is used to change the status from NEW to RELEASED, or to the *Job Reopen* screen, which is used to change the status from CLOSED to RELEASED.

**Scheduling Sub-Tab**

All dates on this sub-tab are now for reference only and are no longer active.

# Job Travelers

(*Jobs – Job Travelers*)

We recommend that job travelers be batch printed as each set of jobs gets released to production in the *Job Control Panel* (see above). When a traveler is printed for a RELEASED status job and the *Job Dates* option is selected, the job's *Released* date and updated *Job Finish* date are now printed instead of the *Planned Start* and original *Job Finish* date. Job dates are no longer printed against NEW status jobs.

# Job Labor

(*Jobs – Job Labor*)

**Status Inquiries**

New inquiries have been added to the upper panel to view *Seq Status*, *Hours Status*, and *Subcon Status*.

# Job Subcontracting

(*Jobs – Job Subcontracting*)

**Material**

This new field enables real time inventory updating as material gets issued to subcontract sequences. It indicates the status of job detail lines assigned to this sequence. You can click the icon to launch the *Job Issues* screen, which is pre-filled with the job detail lines assigned to this sequence, as well as any job detail lines for previous sequences that have remaining quantities.

## Job Inquiry

(*Jobs – Job Inquiry*)

**Subcon Column**

A new *Subcon* column provides greater visibility of subcontract routiong sequences.

**Events Log Tab**

This new tab lists various job transactions by user to provide an audit trail of user activities.

## Shop Control Guide (New)

(*Jobs – Education – Shop Control Guide*)

This new user guide explains how to use shop control in its entirety, all within a single reference source. It is organized into these chapters:

Introduction
Why You Need Shop Control
Total Control Workflow
Shop Control Overview
Setup – Work Center Capacities
Setup – Job Labor Options
Setup – Subassembly BOMs
Monitoring Open POs
Releasing Jobs to Production
Issuing Material in Real Time
Assigning Sequences to Workers
Updating Labor as Sequences Are Finished
Subcontract Service Processing
Receiving Finished Items to Inventory
Closing Finished Jobs
Monitoring Released Jobs
Monitoring Shop Conditions
Using Queue Control (Optional)
Shop Control Guidelines

Common Questions

## Manufacturing Efficiency Guide

(*Jobs – Education – Manufacturing Efficiency Guide*)

This user guide has been completely revised and explains the seven essential processes that dramatically boost your manufacturing efficiency.  It is organized into these chapters:

Introduction
What Is Manufacturing Efficiency?
The Seven Essential Processes
Essential #1 – Plan a Strategic Inventory
Essential #2 – Generate a Master Schedule
Essential #3 – Release Jobs with Material
Essential #4 – Coordinate Work Centers
Essential #5 – Issue Material in Real Time
Essential #6 – Track Job Labor
Essential #7 – Use WIP-Based Product Costing
The Four Efficiency Values

## Product Costing Guide (New)

(*Jobs – Education – Product Costing Guide*)

This new user guide explains how to set up and use WIP-based product costing in its entirety, all within a single reference source.  It is organized into these chapters:

Introduction
Why You Need WIP-Based Product Costing
Total Control System Workflow
Product Costing Overview
General Ledger Setup
Absorption Costing and Shop Rates
Job Receipts and Job Close
Absorbed Cost Variances
Inventory Value
Period End
Using a Mainstream Accounting Package
Product Costing Guidelines
Common Questions

## Videos – Shop Control Guidelines (New)

(*Jobs – Education – Videos - Shop Control Guidelines*)

These new videos step you through a set of sequential guidelines that must be followed for shop control to work properly and help you maximize your manufacturing efficiency.

## PO Schedule

(*Purch – PO Schedule*)

This screen has been extensively revised to provide greater visibility of the master PO schedule.

### Split Screens

The screen is now split into separate screens for *Stock Items*, *Subcontract* lines, and *Descriptors*.  Screen selection is made in the *Line Type* panel.

### Days Past Req Filter

You can select the *Days Past Req* checkbox in the upper panel to limit the screen to PO lines that are late relative to their *Required* dates.

### Expected Date

This new date field is the master schedule supply date.  By default, it is equal to the *Due Date*.  When a PO is late, however, and the supplier gives you a firm delivery date, you enter that date in this field to update the master schedule with a realistic supply date.

### Required Date

This new date field displays the PO's current required date.  It is updated each time the screen is launched.  If the earliest dependent demand event is a job, this is the job's *Planned Start* date.  If the earliest dependent demand event is a sales order, this is the SO line item's *Required* date.  If there is no dependent demand, the date does not get changed.

### Days Past Req

A value in this field means that the *Expected* date or current date, whichever is latest, is 'X' calendar days past the PO line's *Required* date, which indicates a late dependency.

### Dependencies

The icon in the new *Dependencies* field, which launches the *Supply Dependencies* inquiry, becomes visible when the PO line is scheduled to be received late relative to dependent demand events.  Dependent demand events are jobs or sales orders with demand dates earlier than the *Expected* date or the current date.

### Dependent Jobs

Jobs listed in the *Supply Dependencies* inquiry will be delayed for release to production if the PO line is not received on time. No action is needed because dependent jobs that are released late will automatically receive higher priority in work center queues and may still be finished by their required dates.

### Dependent Sales Orders

Sales order lines listed in the *Supply Dependencies* inquiry will be late for shipment if the PO line is not received by its *Required* date. When this is the case, you may wish to inform the customer when shipment is likely to be made.

> NOTE: When shipment is likely to be delayed, never change the sales order line *Required* date, which must be left as is to give the sales order high priority within the *Shipment Planner* in the *Order Picking* screen.

## MRP Session

This new field displays the MRP session number from which each PO line was generated. If the PO line was created manually, 'Manual' is displayed.

# Purchase Orders

(*Purch – Purchase Orders*)

### Due Date

The line item *Due Date* is now determined by each item's *Lead Days* setting instead of the header *Due Date*.

# Purchasing Guide (New)

(*Purch – Education – Purchasing Guide*)

This new user guide explains how to set up and use purchasing in its entirety, all within a single reference source. It is organized into these chapters:

Purchasing Overview
Item Sources
P Item Settings
PO Generation
PO Receipts
PO Invoices
Job Subcontracting POs
Purchasing Guidelines
Common Questions

# Customer Deposits

(*AR – Customer Deposits*)

It is no longer required nor recommended to specify a sales order number when a customer deposit is created. All unapplied deposits are now listed and eligible for application at time of invoice posting.

**Sales Orders – Invoicing**

Previously, deposits were applied before the invoice was actually posted. Now the invoice gets posted first and if any unapplied deposits exist, a screen is presented that enables you to apply a deposit amount to the invoice. Invoices with applied deposits can now be reversed, which previously was not allowed.

## Financial Transfer Guide (New)

(*Transfer – Education – Financial Transfer Guide*)

This new user guide explains how to use the financial transfer in its entirety, all within a single reference source. It is organized into these chapters:

Introduction
Why You Need the Financial Transfer
Total Control System Workflow
Financial Transfer Overview
Multiple Operating Entities Setup
General Ledger Setup
Financial Transfer Defaults
AR Voucher Transfer
AP Voucher Transfer
GL Summary Transfer
Tax Reporting and Payment
Financial Transfer Guidelines
Common Questions

# Build 394 FAQ

Build 394 includes significant enhancements to production planning that can dramatically improve your manufacturing efficiency.  A *Build 394 FAQ* paper is available as a companion piece to these release notes.  This paper explains in FAQ format what changes have been made and how to adapt your processes to fully benefit from them.

Go to *Program Updates / What's New – Build 394.0.1 Update Available – Build 394 FAQ* to access this paper in the online support center.

# Database Changes

**Data Dictionary Updated**

The *Data Dictionary* has been updated to reflect the changes listed below and is accessed from the *File* menu.

**Database Changes**

PODETL

- Line item due date changed from REQDATE to PODETL_DUEDATE. This affects PO details and PO form editing.
- Added Expected Date to PO Schedule (PODETL :  PODETL_EXPDATE)
- Added Required Date MRP to PO Schedule (PODETl : PODETL_REQDATE)

Added DBA User Name Audit to

- Sales Order Header and Jobs Header  (JOBS : JOBS_UNAMESID)
- Sales Order and Job Details (JOBDETL : JOBDETL_UNAMESID)
- Purchase Order Header (PORDER : PORDER_UNAMESID)
- Purchase Order Detail (PODETL : PODETL_UNAMESID)

ITEM

- Forecast Sales Monthly ITEM : PROJ_SALES
- Forecast Usage Monthly ITEM : PROJ_USAGE
- Forecast Safety Monthly ITEM : SAFETY_STOCK
- Supply Days  ITEM : SUPPLY_DAYS

# Build 394 Releases

| Build 394.0.0 | Main Release | December 16,2014 |
|---|---|---|
| Build 394.1.0 | Service Pack | March 18, 2015 |
| Build 394.2.0 | Service Pack | May 6, 2015 |
| Build 394.3.0 | Service Pack | February 3, 2016 |
| Build 394.4.0 | Service Pack | March 8, 2016 |
| Build 394.5.0 | Service Pack | June 9, 2016 |

# Service Pack – Build 394.1.0

**Resolved Programming Issues**

This service pack includes program fixes as well as the new features listed below.  For program fix details, see *Program Updates / What's New – Build 394.1.0 Update Available – Programming Issues Resolved – Build 394* in the online support center.

## Startup Wizard (New)

(*Startup – Startup Wizard*)

**Not accessible if your system is already activated**

The *Startup Wizard* is only for new system implementation.  Once your system is activated or has live transactions, the *Startup Wizard* is no longer accessible.

**What does the Setup Wizard do?**

The *Setup Wizard* guides you through the implementation process so that master tables are fully populated in the correct order, forms and labels are customized as needed, users are rehearsed in workflow processes, and startup day processes are correctly performed prior to system activation.

**Implementation progresses through 15 phases**

Implementation progresses through the following 15 phases, each of which is listed in the left hand panel in sequential order:

Phase 1 – Project Team
Phase 2 – Orientation
Phase 3 – Installation
Phase 4 – System Setup
Phase 5 – Bill of Manufacturing
Phase 6 – Inventory Control

Phase 7 – Sales Orders

Phase 8 – Custom Manufacturing

Phase 9 – MRP

Phase 10 – Shop Control

Phase 11 – Product Costing

Phase 12 – Financial Accounting

Phase 13 – User Training

Phase 14 – Startup Day Preparation

Phase 15 – System Startup Day

**Each phase consists of a set of tasks**

Each phase consists of a set of sequential tasks displayed in the grid at right. Each task is to be performed in the order listed.  The phase is completed when all its tasks are checked as *Completed*.

**Transactions are blocked during implementation**

Live transactions are blocked during implementation to prevent the system from being used until it is fully set up, rehearsed, and ready for startup day.

**The final task activates the system**

The final wizard task in the *System Startup Day* phase activates the system for live use.  By this time all master tables will be fully populated, forms and labels will be formatted, users will be rehearsed in workflow processes, initial stock quantities will be imported, and open sales orders, purchase orders, and jobs will be entered.

## Contract Pricing

(*Sales – Pricing & Discounts – Contract Pricing Sub-Menu*)

The four *Contract Pricing* screens have been completely revised with a new interface and sorting and filtering options.

## MRP Settings

(*MRP – MRP Settings*)

**Monthly forecast decimal entry**

A decimal value can now be entered against *Monthly Forecast – Sales* and *Monthly Forecast – Usage* amounts to accommodate sales or usage less than one unit per month.

## MRP

(*MRP – MRP*)

**Display – No Action Needed**

This new field has been added to the *Display – No Action Needed* screen that lists future requirements for jobs and POs.

**Move**
Click this icon to move this item to the *Planned Jobs* or *Planned POs* list so that a job or PO can be created.

### Enter a Plan Qty against the planned job or PO

When the item is moved to the *Planned Jobs* or *Planned POs* list, the *Plan Qty* is zero because no current requirements exist. Enter a *Plan Qty* to create a job or PO based on your evaluation of stock status and the item's *Min Order* and *Multiple* settings.

## Planned Jobs and Planned POs

The following sorting options have been added to the *Planned Jobs* and *Planned POs* grids:

### Sort Grid
Clicking this button displays a screen that enables you to rearrange the sort order of various grid columns.

### Item Category
This field has been added to the grid for sorting purposes.

# DBA Help (F1)

(*Help – DBA Help (F1)*)

*DBA Help* has been redesigned and now includes live videos, screen shots, and links to workflow guides, the *Manufacturing Efficiency Guide*, the *Training Guide* and *Startup Guide*, and technical guides for data import, product updates, and system installation.

# Training Guide (New)

(*Help – DBA Help (F1) – Training Guide*)

This new guide covers user training tasks, which are listed in their recommended order of completion. The guide includes live links to training videos and workflow guides.

User training is done in the Sample Company so that data can be freely entered without affecting live operations. Users will work with data that demonstrates proper setup and use of the system and in the process may get inspired to make improvements to previous setup tasks.

# Startup Guide (New)

(*Help – DBA Help (F1) – Startup Guide*)

This new guide covers system startup tasks, which are listed in their recommended order of completion. This guide is a companion resource to the *Startup Wizard* screen, which is only accessible within new systems that have not yet been activated. Each task in the *Startup Wizard* links to a corresponding topic in this guide.

Once your system is activated or has live transactions, the *Startup Wizard* is no longer accessible.  If your system is not properly implemented and you wish to follow the wizard tasks to get back on track, you can follow this guide and track your completion progress manually.

# Hotfix – Build 394.1.1

## Discounts

(*Sales – Pricing & Discounts - Discounts*)

### Item Category discounts were <u>deleted</u> with Build 394 update

If you had updated to any version of Build 394 prior to this hotfix build, Item Category discount records in the *Discounts* screen were inadvertently deleted during the update process.

### Contact support for recovery assistance

If you cannot easily reenter your Item Category discounts manually, contact support and we can help you recover your discount settings from a backup.

# Service Pack – Build 394.2.0

## Resolved Programming Issues

This service pack includes program fixes as well as the new features listed below.  For program fix details, see *Program Updates / What's New – Build 394.2.0 Update Available – Programming Issues Resolved – Build 394* in the online support center.

## MRP Defaults

(*MRP – MRP Setup – MRP Defaults*)

### Item Planning Period (New)

This new setting determines the length of each item's planning period, which is the MRP "action window" for job and PO generation.  Two options are available:

#### Replenish Time (Recommended)
Each item's *Replenish Time* is the total number of calendar days allocated for making or procuring the item.  It consists of the item's *Lead Days* and *Job Days*, the system *MRP Interval* days, and non-shop days within the *Job Days* and *MRP Interval*.

##### Provides for "just in time" planning

This option is recommended because it provide for "just in time" planning that minimizes inventory.  The only current action needed at any given time is to cover actual or forecast demand for the item within the time it takes to replenish stock.  Any demand beyond the item's *Replenish Time*

will be responded to in a future MRP session when that demand firms up and ultimately falls into the item's action window.

**Replenish Time + Extra Days**

Select this option to expand the *Replenish Time* "action window" with extra shop days.

### Use with moderation

Keep in mind that demand beyond an item's *Replenish Time* is often incomplete and subject to change.  This is even more so the further out that demand is.  If you choose to add extra days to item planning periods, use moderation when setting the extra days amount to avoid premature stock on hand, responding to  incomplete demand profiles,  and increasing potential need for date and quantity changes.

### Extra Days Settings

The extra days amount is specified separately for M and  P items.

#### Extra Shop Days for M Items
Use this field to expand the planning period for your manufactured items.

##### Minimize use with blanket sales orders

If you enter blanket (scheduled) sales orders, be aware that an expanded planning period will result in larger job quantities as more future demand gets included in the MRP action window.

#### Extra Shop Days for P Items
Use this field to expand the planning period for your purchased items.

## Do not "pad" the MRP Interval

Do not pad the *MRP Interval* setting because it will inflate *Forecast Reorder Point* .calculations.  If you wish to expand item planning periods, use the new *Item Planning Period* setting above to add extra calendar days to item planning periods.

### Setting the MRP Interval

The *MRP Interval* is used to expand each item's planning period to account for the number of <u>shop days</u> that may elapse prior to the next MRP session.  If you always run MRP on a daily basis, which is recommended, specify one day.  If you run MRP every other day, specify two days, and so on.

# MRP Settings

(*MRP – MRP Settings*)

**Manual Reorder Point (New)**

This new order policy enables you to manually enter a *Reorder Point* against M or P items. It replaces the *Unassigned* order policy. The *Forecast* order policy has been renamed *Forecast Reorder Point* to more accurately describe its purpose.

**Use the Forecast Reorder Point whenever possible**

A *Manual Reorder Point* is inefficient and leads to over-stocking because it has no calculation basis and is not adjusted when item replenishment time changes.

By contrast, a *Forecast Reorder Point* is calculated from a monthly forecast and replenish time and gets automatically recalculated whenever a change is made to the item's *Lead Days* or *Job Days* allocations. Furthermore, it can be combined with a *Supply Days* setting so that job and PO quantities cover a specific number of days of forecasted demand.

**Spare Stock (New)**

This new setting is located within the *Order Policy* screen. It is only visible against the *To Order* order policy. Use this setting to maintain a small stock quantity against a to-order item to cover demand for spares or exchanges. Whenever a to-order job or PO is generated, the quantity will be increased as needed to replenish the *Spare Stock* target.

NOTE: *Spare Stock* never gets replenished with its own job or PO. Replenishment only occurs in conjunction with a to-order job or PO.

## MRP

(*MRP – MRP*)

**Planned Jobs – Job Type**

A *Job Type* field has been added to the *Planned Jobs* grid. It is only visible when two or more job types are defined in the *Job Types* screen. The default *Job Type* is automatically assigned, but can be changed if desired.

**PO Conversion – PO Type**

If two or more PO types are defined in the *PO Types* screen, you are now prompted for the *PO Type*. The default *PO Type* is automatically selected, but can be changed if desired.

## Job Control Panel

(*Jobs – Job Control Panel*)

**Release Jobs Screen – Header Panel**

**Sort Options**

Click this new button to launch the *Sort Options* tool, within which you change the grid sort order.

**Search**

Use this new field to enter a character string that limits the grid to job numbers and descriptions containing that string.

## Job Schedule

(*Jobs – Job Schedule*)

**Header Panel**

**Search**

Use this new field to enter a character string that limits the grid to job numbers and descriptions containing that string.

**New Status Jobs**

**Planned Start Date**

This date was formerly read-only and can now be changed. It display the job's scheduled start date. If this date gets changed, the *Job Finish* date is automatically changed to preserve the same shop days "spread" between the two dates.

**Leave this date fixed as is**

With "just in time" planning there is no need to change the *Planned Start* date, which should stay fixed as is to reflect the initial master schedule date generated by MRP. When the job gets released to production in the *Job Control Panel* based on material availability, it will be given a *Released* date, which is the actual start date that can be compared to the *Planned Start* date. The job is also given a new *Job Finish* date relative to the *Released* date, which is the means by which the master schedule gets automatically adjusted to reflect actual conditions in the shop. Manual intervention with scheduling dates is not needed except for rare exceptions.

## Manufacturing Efficiency Guide

(*Jobs – Education – Manufacturing Efficiency Guide*)

These two chapters have all-new content that explains how you can use item order policies and allocations to dramatically boost your manufacturing efficiency.

**Essential #1 – Plan a Strategic Inventory**

This chapter explains how you can apply *Forecast Reorder Point* order policies to selected items to dramatically reduce times to shipment while keeping inventory to a minimum.

**Essential #2 – Generate a Master Schedule**

This chapter explains how to properly use the scheduling system to meet master schedule required dates.

# Hotfix – Build 394.2.1

**Resolved Programming Issues**

This hotfix addressed a slowdown in system performance in the item list screen lookup and item list loading times.  It also corrected an error preventing items with characteristics from using the *Utilities – ID Change – Item ID Change* tool.

# Service Pack – Build 394.3.0

**Installation Wizards (New)**

A new set of installation wizards is fully compatible with Windows 10 and facilitates new system installation, training company installation, and product updates installation.

### DBA Manufacturing Installation Wizard

File Name: *DBAManufacturing_(Build No).exe*

NOTE1: This installation file is now shared by the new system wizard and the product update wizard.  The program automatically detects whether a system is installed or not and activates the appropriate wizard.

NOTE: New system installation is no longer available for Windows Server 2003 or Windows XP.

### DBA Manufacturing Client Installation Wizard

File Name: *DBAClientInstall.exe*

NOTE: Client installation is no longer available for Windows XP.  Existing Windows XP clients will continue to function.

### DBA Beta/Training Company Installation Wizard

File Name: *DBAManufacturingBeta_(Build No).exe*

### DBA Manufacturing Update Wizard

File Name: *DBAManufacturing_(Build No).exe*

NOTE1: This installation file is now shared by the product update wizard and the new system wizard.  The program automatically detects whether a system is installed or not and activates the appropriate wizard.

NOTE2: Product updates can no longer be applied to Windows Server 2003 or Windows XP systems.

## Installation / Update Guide (New)

(*Help – DBA Help (F1) – Technical Guides – Installation / Update Guide*)

This new guide addresses all issues related to system installation, product updates, and backup procedures.  Sections include:

System Requirements
New System Installation
Training Company Installation
Product Updates Installation
License Key Installation
Backup Procedures
Server Migration

## Cycle Count Codes (New)

(*Inventory – Inventory Setup – Cycle Count Codes*)

This new screen enables you to create user-defined *Cycle Codes* and assign sets of items to them for cycle counting purposes.  Each *Cycle Code* is given a *Frequency* interval (*Weekly*, *Monthly*, *Quarterly*, *Yearly*, *Custom*) that establishes the next scheduled stock count date.  The screen includes a history inquiry of past stock counts by *Cycle Code*.

## Data Import – Cycle Code - Items (New)

(*File – Data Import – Stock Items – Cycle Code – Items*)

This new data import screen enables you to import a set of items to a *Cycle Code*.  You can specify whether the import is a full replace of the existing item set or an incremental addition to the existing item set.

## Stock Counts

(*Inventory – Stock Counts*)

A stock count can now optionally be initiated from a *Cycle Count Code*.

## Stock Items

(*Inventory – Stock Items*)

### Sources Tab - Supplier Price

A deliberate zero can now be entered against a supplier price to accommodate consignment inventory and other no charge purchases.  The supplier pricing table now includes the supplier currency and unit of measure.

## PO Invoices

(*Purch – PO Invoices*)

Invoice matching is now significantly easier with two enhancements.  First, you can now enter a zero dollar invoice for no charge purchases.  Secondly, PO lines

can now optionally be matched by the *Total Price* as an alternative to the unit *Supplier Price*.

## Step-by-Step Demos (New)

(*DBAManufacturing.com – Product – Step-by-Step Demos*)

This new demo series on the *Product* page of our website steps you through all the processes that comprise the "Total Control" process workflow.

# Hotfix – Build 394.3.1

**Resolved Programming Issue**

This hotfix addressed a problem updating a system that had a non-standard installation path.

# Hotfix – Build 394.3.2

**Resolved Programming Issue**

This hotfix addressed a problem installing when the Windows Account Login Name had a space in it.

# Hotfix – Build 394.3.3

**Resolved Programming Issue**

This hotfix addressed a problem where under certain conditions the PO Invoice list value did not match the PO details.

# Hotfix – Build 394.3.4

**Resolved Programming Issue**

This hotfix addressed a problem where a payment reversed against a PO invoice resulted in the invoice not being displayed in the opening *List* tab of the *PO Invoices* screen.

# Service Pack – Build 394.4.0

## Admin Task

### Check for INVALID-WC work center and fix associated processes

This service pack update performs a data integrity check on the work center IDs used in all your BOM and job routing sequences. If any invalid work center IDs are detected, an INVALID-WC work center is created and replaces any invalid work center IDs in the affected BOM and job routing sequences.

If you see that an INVALID-WC has been created in the *BOM – Work Centers* screen, you can fix the affected routing sequences as follows.  Go to the *BOM – Process Replace* screen and replace the work center against each process associated with the INVALID-WC work center.  This will replace the invalid work center with the valid work center in all sequences associated with that process.  After all such processes have been replaced, go to the *BOM – Work Centers* screen and inactivate the INVALID-WC work center.

## Data Import – MRP Analysis Code - Items (New)

(*File – Data Import – Stock Items – MRP Analysis Code - Items*)

This screen enables you to import a set of items for assignment to an MRP analysis code.  You have the option of fully replacing the existing item assignments or you can incrementally add new items to the existing item set.

## Work Center ID Change (New)

(*Utilities – ID Changes – Work Center ID Change*)

Use this screen to change a Work Center ID across all associated database tables.

## Subcontractor ID Change (New)

(*Utilities – ID Changes – Subcontractor ID Change*)

Use this screen to change a Subcontractor ID across all associated database tables.

## MRP Analysis Codes (New)

(*MRP – MRP Analysis Codes*)

MRP analysis codes enable you to schedule periodic reviews of MRP settings for related sets of items.  Against each analysis code you specify the desired frequency interval between each analysis, which can be weekly, monthly, yearly, or a custom number of days.  You then assign a set of related items to the analysis code.  Analysis codes are designated for M items or P items, but not for both.

Whenever you launch the *MRP Analysis Codes* screen, any analysis codes due for an analysis are listed with the *Next Analysis* date displayed in bold red.  You click the *Action* button to launch the *MRP Settings* screen, which is filtered to just the items assigned to the analysis code.

One by one you can review each item's MRP settings and make adjustments as needed.  After each item is reviewed, you can optionally select its *Analysis Complete* checkbox to track your progress.  You can pause and return to your analysis as often as you wish.

When the analysis is completed, you click the *Action* button and indicate that the analysis is complete.  The analysis gets saved to history and the next analysis date is scheduled.

MRP analysis codes are best used to maintain monthly forecast settings against <u>critical</u> items where precise *Reorder Points* can minimize the probability of shortages or over-supply.

# Hotfix – Build 394.4.1

**Resolved Programming Issue**

This hotfix addressed a problem where *Startup Wizard* tasks were not accessing the correct help text.

> NOTE: The *Startup Wizard* is only used for new system implementation prior to system startup day.  If your system is already activated for live transactions, it is not necessary to install this hotfix.

# Hotfix – Build 394.4.2

**Resolved Programming Issue**

The *BOM - Estimated Purchase Costs* screen was only listing P items that had quantity on hand instead of properly including all P items for estimated cost updating.

# Hotfix – Build 394.4.3

**Resolved Programming Issue**

The previous hotfix introduced an error that prevented Emails from being sent from the system.

# Service Pack – Build 394.5.0

**Resolved Programming Issues**

This service pack includes various program fixes.  For details see *Program Updates / What's New – Build 394.5.0 Update Available – Programming Issues Resolved – Build 394* in the online support center.

## Sales Orders

(*Sales – Sales Orders*)

### Speed Entry

The *Transfer* process within the *Speed Entry* screen was redesigned to significantly reduce new line creation time.

## Product Costing Guide

(*Help – Workflow Guides – Product Costing Guide*)

### Cost of Goods Sold (COGS)

This new chapter explains how Cost of Goods Sold (COGS) is derived and how to achieve realistic COGS values.

## Hotfix – Build 394.5.1

### Resolved Programming Issue

The *Speed Entry* function in the *Quotes* screen was causing an error message with multi-line processing.