

# TFG4000™

## Job Order Management

## Users Guide



Version 1.4

Copyright © 2003 The Fredrick Group, Inc. All rights reserved.

Information in this document is provided by The Fredrick Group, Inc. on an “as is” basis, without any other warranties or condition, express or implied, including but not limited to, warranties of merchantable quality, satisfactory quality, merchantability or fitness for a particular purpose, or those arising by law, statute, usage of trade, course of dealing or otherwise. The entire risk as to the results of the information received is assumed by you. We shall have no liability to you or any other person or entity for any indirect, incidental, special, or consequential damages whatsoever, including, but not limited to, loss of revenue or profit, loss or damaged data or other commercial or economic loss, even if we have been advised of the possibility of such claims by a third party. Our maximum aggregate liability to you and that of our dealers and suppliers shall not exceed the amount paid by you for the particular product or copy of the product or service giving rise to the claim. Some states/countries do not allow the exclusion or limitation of liability for consequential or incidental damages, so the above limitations may not apply to you.

TFG4000 is a trademark of The Fredrick Group, Inc.

Microsoft®, Windows®, Windows NT®, are trademarks or registered trademarks of Microsoft Corporation.

Java® is a registered trademark of Sun Microsystems.

All other products, fonts, names, and logos are trademarks of their respective company.

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>).

The Fredrick Group, Inc. (TFG) welcomes your comments. Please address them to:

The Fredrick Group, Inc.  
PO Box 1698  
Cumming, Georgia 30028

By e-mail: Send an e-mail to [tfg4000@fredrickgroup.com](mailto:tfg4000@fredrickgroup.com).

Printed January 2004

## Table of Contents

Welcome.....	6
System Requirements.....	6
Starting TFG4000.....	7
Single User.....	7
Multiple User.....	8
Server Startup.....	8
Client Startup.....	8
Built-in Help.....	9
Screen Level Help.....	9
Field Level Help.....	9
Column Level Help.....	9
Tip of the Day.....	10
Tool Tips.....	10
Using TFG4000.....	11
Menus.....	12
Buttons & Icons.....	14
Toolbar Buttons.....	14
Screen Buttons.....	15
Table Buttons.....	15
Information Icons.....	16
Field Colors.....	17
Changing Screen Table Properties.....	17
Performing Searches.....	18
Search Screen (Fields).....	18
Search Pop-Up Screen (Tables).....	20
Working with Reports.....	22
Process Definition.....	24
What is a Process?.....	24
Process Definition Screens.....	24
Process Maintenance.....	24
Process Information.....	24
Operation Information.....	24
Process Summary.....	24
Process Definition Screens Explained.....	25
Process Maintenance Screen.....	25
Accessing the Process Maintenance Screen.....	26
Using the Process Maintenance Screen.....	27
Process Definition Reports.....	29
Process Information Screen.....	30
Accessing the Process Information Screen.....	31
Using the Process Information Screen.....	32
Operation Information Screen.....	36
Accessing the Operation Information Screen.....	37
Using the Operation Information Screen.....	38
Process Summary Screen.....	42
Accessing the Process Summary Screen.....	43
Using the Process Summary Screen.....	43
Process Summary Reports.....	43

Job Order.....	44
Initial Set up.....	44
What is a Job Order (Work Order)? .....	44
Job Order Screens .....	44
Job Order .....	44
Information .....	44
Parts .....	45
Process .....	45
Process Information.....	45
Operation Information.....	45
Picking.....	46
Component History.....	46
Job Order Summary.....	46
Shortage .....	46
Job Order Screens Explained.....	47
Job Order Screen.....	47
Accessing the Job Order Screen .....	49
Using the Job Order Screen.....	50
Job Order Reports .....	56
Job Order Information Screen.....	58
Accessing the Job Order Information Screen.....	59
Using the Information Screen.....	60
Parts Screen .....	64
Accessing the Parts Screen .....	66
Using the Parts Screen .....	66
Job Order Parts Reports.....	68
Job Order Process Screen .....	69
Accessing the Process Screen .....	70
Using the Job Order Process Screen .....	71
Job Order Process Reports .....	73
Job Order Process Information Screen .....	74
Accessing the Job Order Process Information Screen .....	75
Using the Job Order Process Information Screen .....	76
Job Order Operation Information Screen .....	80
Accessing the Operation Information Screen.....	81
Using the Job Order Operation Information Screen .....	82
Picking Screen .....	86
Accessing the Picking Screen.....	87
Using the Picking Screen .....	88
Job Order Picking Reports .....	89
Component History Screen.....	90
Accessing the Component History Screen.....	91
Using the Component History Screen.....	92
Job Order Component History Reports .....	92
Job Order Summary Screen .....	93
Accessing the Job Order Summary Screen.....	94
Using the Job Order Summary Screen .....	94
Job Order Summary Reports .....	94
Shortage Screen.....	95
Accessing the Shortage Screen.....	96
Using the Shortage Screen.....	97
Job Order Shortage Reports .....	98
Advanced Installation .....	99

Documentation .....	99
Registration.....	99
Suggestions .....	99
Services.....	99
Support .....	100
Initial Installation Support .....	100
Pay-As-You-Go Support.....	100
Other Support Options .....	100
TFG4000 Software Series .....	100

## Welcome

The TFG4000 Software Series is a set of business management software applications that offer the robust functionality of an advanced management tool, yet tailored to meet the needs and budget of your growing business. Even better – every application in the TFG4000 Software Series is sold separately as a stand-alone product, which means you buy only what you need to run your operation more efficiently. For example, companies that only need to track and manage inventory are not forced to navigate through a multitude of unnecessary screens, but rather access the specific application that they need to perform their business operation. The added bonus of having every application in the TFG4000 Software Series is that each product recognizes the others and runs in harmony to provide you the optimum benefit of business management software.

TFG4000 is an easy-to-learn, user-friendly system that requires only minimal keystrokes for entering information. There are customizable dropdowns, font sizes, and screen colors available within the applications, as well as powerful search capabilities and built-in help features to help guide you through the system. With TFG4000, you have the ability to pull up various summary screens, enter as little or as much data as you need, process a variety of reports - all of which help you save both time and money, which will add directly to your bottom line. For added convenience, TFG4000 also allows you to run the system in either single or multi-user mode, whichever works best for your business. Other features include optional security, as well as data import and export features, which save you the work of re-keying information. In all, TFG4000™ is the smart source for business management. A simple solution for a complex process.

## System Requirements

Microsoft® Windows® 98, Windows NT® 4.0, Windows® 2000, Windows® ME, or Windows XP®, with the latest Service Pack applied.

Pentium® class processor, 350mhz or greater.

90MB free disk space.

128MB of RAM (256MB recommended).

Network Interface Card configured to use TCP/IP if installing in multiple user mode (client / server

# Starting TFG4000

Perform the following steps to start TFG4000 in either Single or Multiple User Mode:

## Single User

1. Open the "Start" menu, and then select the "Program" option.
2. Select "TFG4000 V1.4" from the program list.
3. Select "TFG4000" to start.
4. The TFG4000 "Welcome" screen is displayed with the "Tip of the Day". You can select "Close" to continue the start up process or select "Next Tip" to view more tips. You can also choose not to have the "Tip of the Day" appear by selecting the check box next to "Don't show Tip of the Day at Startup" located on the Welcome screen. Select the check box again at any time to reinstate the "Tip of the Day" feature.
5. If you see a "User" and "Password" field on your screen, enter the User ID and Password that your System Administrator provided you, and either press "Enter" or click "Sign On".
6. If your screen only displays "Welcome" without any other fields, then click the plus sign ("+") next to the application you want to perform in the "NavTree".
7. Click on the screen you would like to use.

## **Multiple User** (Not available in the Demo Version)

### **Server Startup**

At installation, the server component is put in the Startup folder of the Program List. It will automatically start at system start up. Perform this procedure only if necessary.

1. Open the "Start" menu, and then select the "Program" option.
2. Select "TFG4000 V1.4" from the program list.
3. Select "TFG4000 Server V1.4" to start.
4. The TFG4000 "Welcome" screen is displayed with the "Tip of the Day". You can select "Close" to continue the start up process or select "Next Tip" to view more tips. You can also choose not to have the "Tip of the Day" appear by selecting the check box next to "Don't show Tip of the Day at Startup" located on the Welcome screen. Select the check box again at any time to reinstate the "Tip of the Day" feature.

### **Client Startup**

1. Open the "Start" menu, and then select the "Program" option.
2. Select "TFG4000 V1.4" from the program list.
3. Select "TFG4000 Client v1.4" to start.
4. The TFG4000 "Welcome" screen is displayed with the "Tip of the Day". You can select "Close" to continue the start up process or select "Next Tip" to view more tips. You can also choose not to have the "Tip of the Day" appear by selecting the check box next to "Don't show Tip of the Day at Startup" located on the Welcome screen. Select the check box again at any time to reinstate the "Tip of the Day" feature.
5. If you see a "User" and "Password" field on your screen, enter the User ID and Password that your System Administrator provided you, and either press "Enter" or click "Sign On".
6. If your screen only displays "Welcome" without any other fields, click the plus sign ("+") next to the application you want to perform in the "NavTree".
7. Click on the screen you would like to use.

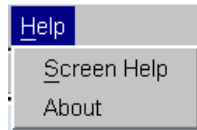


## Built-in Help

Help is available at the screen, field, and column level, as well as built-in tool tips.

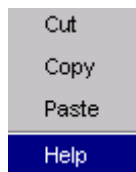
### Screen Level Help

To select screen level help, click "Help" on the "Menu" bar, and then select "Screen Help". Help for the screen is then displayed.



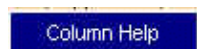
### Field Level Help

To select field level help, right click on the field, and then click "Help" from the pop-up. Help for the selected field is then displayed. You may also press the F1 key to get field help.



### Column Level Help

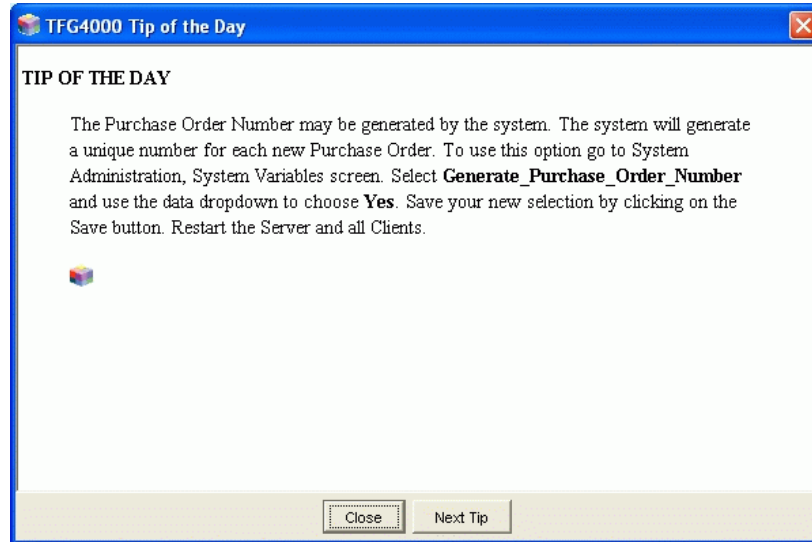
To select column level help, right click on the column heading, and then click "Help" from the pop-up. Help for the selected column is then displayed.



## Tip of the Day

Each time you start TFG4000, there is a “Tip of the Day” pop-up displayed that describes some of the functionality that is available within the application. To close the “Tip of the Day” pop-up, click the “Close” button. To view another tip, click the “Next Tip” button. This feature can be turned off by clicking the box next to “Don’t Show Tip of the Day at Startup” on the Welcome screen. A check mark will appear in the box indicating the “Tip of the Day” should not be displayed during start up. To reinstate the “Tip of the Day” feature, click the box and the check mark will disappear indicating the “Tip of the Day” should be displayed during start up.

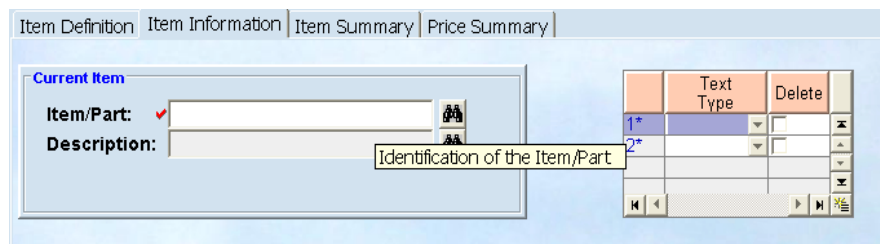
Example Only:



## Tool Tips

Throughout TFG4000, there are embedded tool tips that help describe certain areas on the screen. You simply roll your mouse (cursor) over the area in question, and a pop-up will describe that specific area. The tool tip pop-up will remain visible for a few seconds, then it will disappear automatically.

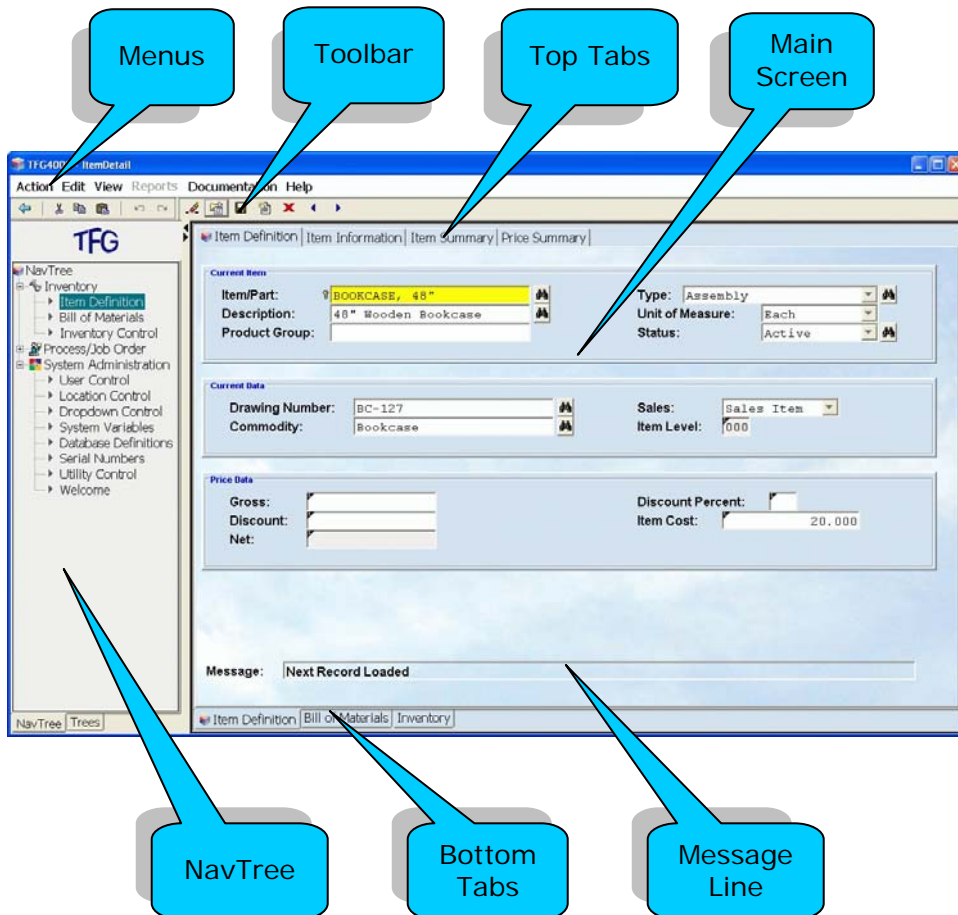
Example Only:



## Using TFG4000

You can navigate through the TFG4000 screens by using the "NavTree", the "Goto Screen" section of the "View Menu", and the tabs on the top and bottom of the screen. For easy use, the toolbar provides a variety of functions for you to choose from as you use the TFG4000 applications. There are buttons located on the toolbar that allow you to perform various functions from each screen, such as opening/displaying data, saving data, etc. The "Menu" provides useful functions as well, such as printing reports, documentation, help, etc.

### Sample Screen



## Menus

Each screen in TFG4000 has various menus available for working with your data. The following describes the purpose of each menu and special features.

### Action

This menu is for printing screens and for exiting TFG4000. It contains the following menu items:

<b>Print</b>	Prints the entire screen in either portrait or landscape mode.
<b>Print Text</b>	Prints only the text currently displayed on the screen in either portrait or landscape mode.
<b>Exit</b>	Terminates the TFG4000 session.

### Edit

This menu is for performing cut, copy, and paste operations on data. It contains the following menu items:

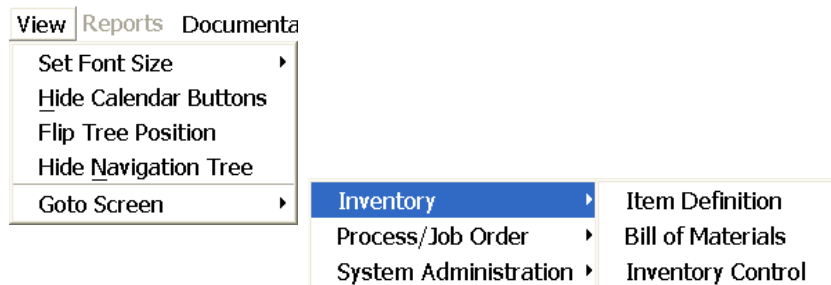
<b>Cut</b>	When you highlight data and use this function, the data is removed from the screen and is available in a clipboard for pasting. Holding the "Ctrl" key and pressing the "X" key will perform the same operation.
<b>Copy</b>	When you highlight data and use this function, the data is copied into a clipboard and is available for pasting. Holding the "Ctrl" key and pressing the "C" key will perform the same operation.
<b>Paste</b>	When you position your cursor in a field and use this function, data you have previously put into the clipboard using the "Cut" or "Copy" operation will be pasted after your cursor. Holding the "Ctrl" key and pressing the "V" key will perform the same operation.

Note: If your keyboard is in "insert mode" the data will not overlay data that follows, but if it is not in "insert mode" it will. Press the Insert key on your keyboard to change your insert mode to whichever way you prefer.

## View

This menu allows you to change the way the TFG4000 screens are presented and how you navigate the screens. It contains the following menu items:

<b>Set Font Size</b>	You can choose a font size from 10 to 18. With larger font sizes you may have to scroll to see the entire screen.
<b>Hide Calendar Buttons</b>	Toggles whether or not a Calendar button is displayed next to the date fields.
<b>Flip Tree Position</b>	Changes the position of the “NavTree” to either the left or the right side of the screen.
<b>Hide Navigation Tree</b>	Hides the “NavTree” from the screen. Click it a second time to display the “NavTree” on the screen.  <b>Note:</b> The dark arrows in the bar between the NavTree” and the main screen perform the same function.
<b>GoTo Screen</b>	Displays the “NavTree” in menu format. You can use this method to navigate the screens at any time but it is particularly useful if you hide the “NavTree”.



## Reports

This menu is only available if there are reports available for the screen you are on. There will be various menu items depending on the screen.

## Documentation

This menu lets you select the TFG4000 manuals for viewing and printing.

## Help

This menu provides help about the screen you are on and information about TFG4000. It contains the following menu items:

<b>Screen Help</b>	Displays information about the screen you are on.
<b>About</b>	Displays information about TFG4000.

## Buttons & Icons

Each screen in TFG4000 has various buttons available for working with your data. The following describes the purpose of each button and special features. It also explains other icons you may see on the screens.

### Toolbar Buttons



Use the following buttons to perform TFG4000 application tasks. The buttons displayed change with the screen you are working with.

### Previous screens







Use this button to return to your previous screen. You can go back up to ten screens.


### Cutting, copying and pasting text


You can use "Cut" and "Paste" to move selected text. You can use "Copy" and "Paste" to copy selected text and paste the copy in another place. "Cut", "Copy", and "Paste" can also be selected from the "Edit" menu.


### Working with data


You can erase, open, save, add, delete, get previous or next, copy, print, and refresh data by using these buttons:


- |  |  |
|--|--|
|  Erase           | This button clears data from the screen. It does not update any data; it merely clears the data away to make it easier for you to enter something else. It is particularly useful for resetting summary screens for a new search and it may be required when adding new entries on some screens. |
|  Open (Display) | This button retrieves data that has been previously saved for viewing and/or modifying. The <b>Enter</b> key executes this button by default.  |
|  Save           | This button stores new data and modified data. If you enter new data or change existing data and do not click this button, the system prompts you to do so.  |
|  Cancel         | This button reduces any remaining quantities to zero and changes statuses to "Cancelled".  |
|  Delete         | This button deletes previously saved data. On screens indicated as "definition" screens, the delete button deletes related data in addition to the data currently displayed. On all other screens only the data displayed is deleted.  |
|  Previous       | This button retrieves data that alphabetically precedes the currently displayed data.  |

-  Next
 

This button retrieves data that alphabetically follows the currently displayed data.
-  Copy
 

This button copies data from one place to another. On screens indicated as "definition" screens, it copies related data in addition to the data currently displayed. On all other screens, only the data displayed is copied.
-  Print
 


This button sends your document to the printer to be printed.
-  Build
 


This button extracts eligible data from one place to create a new definition in another place. For example, it can extract customer order data to build a new invoice.
-  Refresh
 


This button rebuilds the data on the screen.

## Screen Buttons

Throughout the screens are buttons that perform functions.

-  Search
 


This button is for finding data you have already entered. When you click this button a search box pops up.
-  Calendar
 

This button provides a pop-up calendar for selecting dates. You can choose the month and the year, and then double-click on the date you desire. Click "Today" to re-position the calendar on the current date. Click "Cancel" if you decide not to select a date. Dates can be entered without using the "Calendar" button if desired. Manually entered dates are verified so a pop-up appears prompting you to correct a date if it is invalid.
-  Dropdown
 

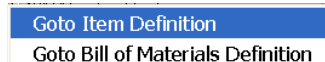
This button provides a "dropdown" list of pre-defined values from various fields that have this button next to it. If you click on one of the values from the dropdown list, that value will appear in the adjacent field.











## Table Buttons

Throughout the tables are buttons that perform functions.

-  GoTo/Selection
 




This button is for either transferring to another screen or selecting data. When you right-click on this button, it displays a menu of related screens and/or a menu of selection activities. To transfer to another screen, click on the screen you desire and that screen is displayed with the appropriate keys already filled in. To select data, such as a component or inventory location, click the action you want.



 Properties	This button is located at the lower left corner of each table. It allows you to edit the layout of the table. You can use this button to hide or display columns in the table and to restore the original table layout.
 Add Rows	This button appears in the lower right corner of modifiable tables so that you can put more empty rows on the screen for adding data to the table. If you are trying to enter another row in a table and there are not any blank rows to use, click the "Add Rows" button.
 Scroll to the Left	This button allows you to scroll to the left of the table.
 Scroll to the Right	This button allows you to scroll to the right of the table.
 Scroll Up	This button allows you to scroll up the table.
 Scroll Down	This button allows you to scroll down the table.
 Scroll Bottom	This button allows you to scroll to the very bottom of the table.
 Scroll Top	This button allows you to scroll to the very top of the table.
 Scroll Left	This button allows you to scroll to the very left of the table.
 Scroll Right	This button allows you to scroll to the very right of the table.

## Information Icons

Icons on the screen show properties about the field.

 Numeric	This icon in the upper left corner of a field indicates that the field is for a numeric value. You are able to enter only numbers, commas, and decimals in fields containing this icon.
 Key	This icon to the left of a field indicates that the field is a key field and is required for this screen.
 Required	If you try to display or save data without entering a required field, this checkmark icon is displayed next to the missing field.



## Field Colors

The fields on the screens and in screen tables have three different colors that have functional significance.

<b>Gray</b>	A gray field is display only, no entry allowed or necessary
<b>White</b>	A white field is open for entering data
<b>Yellow</b>	A yellow field indicates where the cursor is currently positioned


## Changing Screen Table Properties

Tables that appear on screens can be modified. The columns can be re-sized, re-positioned, hidden, and un-hidden.

To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.

**Note:** Re-sizing and re-positioning remain in effect for the duration of the current session. The default sizing and positioning is restored when TFG4000 is restarted.

To hide or unhide a column click the Properties button  located in the lower left corner of the table. A red check mark next to the column name indicates the column will be displayed. If there is not red check mark next to the column name it will not be displayed in the table. There may be multiple tabs for the table, so you must click on the tab that contains the column(s) you want. To save the changes you have made, click the "OK" button. To discard the changes you have made, click the "Cancel" button. To reset the properties back to the default properties, click the "Restore Default Visibility" button. Another pop-up will appear asking the range you wish to restore. Use the dropdown provided to select either "All Tabs", which will restore the defaults for the entire table, or "Currently Displayed Tab Only", which will restore the default properties only for the portion of the table indicated by the tab you are viewing. Once you have made your selection click "OK" or "Cancel". That pop-up will disappear and the column visibility properties are reset as requested or the reset action is cancelled. Then you may click either "OK" or "Cancel" to save or discard the property changes.

**Note:** Property changes remain in effect even after TFG4000 is restarted.

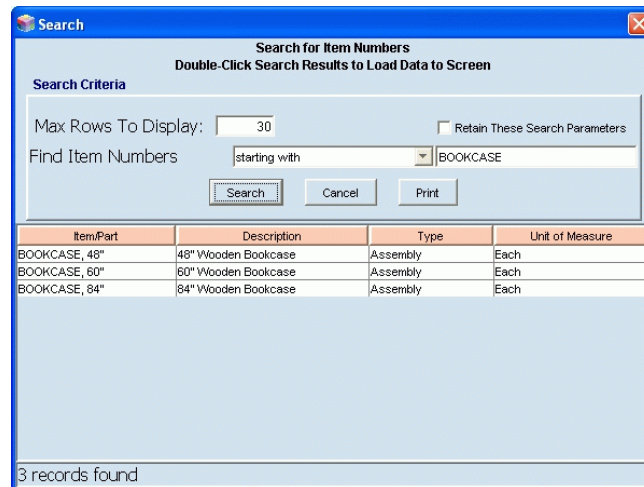
## Performing Searches

There are two types of searches in TFG4000 that are similar in appearance, however they have different functionality. The first is a "Search" associated with a field on the screen. The second is a "Search Pop-up" which is found on tables. One of the differences between the two is that a "Search Pop-up" can load multiple table rows to the screen at one time but a "Search" will not. Another difference is that "Search" screen results can be printed but "Search Pop-up" results cannot.

### Search Screen (Fields)

Below is an example of a search screen that may be used to locate information already entered into the system, and/or to automatically populate the fields on the screen that you are currently viewing or editing. When search results are displayed you can move the columns into different places on the search screen so that the values can be viewed in positions different from the default layout. Click the heading of the column you wish to move then drag and drop it into the desired position. Resize columns by moving the cursor over the heading until you see an arrow with two heads. Click, and with the mouse button still down, move the cursor right or left until the column is the desired width. The default layout is restored when the "Search" button is pressed and when you exit the search. In addition, you also have the option to retain search parameters by checking the box located next to "Retain Search Parameters". This option allows you to save the search parameters you used for future searches.

#### Example Only:



Search

Search for Item Numbers  
Double-Click Search Results to Load Data to Screen

Search Criteria



Max Rows To Display:   Retain These Search Parameters

Find Item Numbers

Item/Part	Description	Type	Unit of Measure
BOOKCASE, 48"	48" Wooden Bookcase	Assembly	Each
BOOKCASE, 60"	60" Wooden Bookcase	Assembly	Each
BOOKCASE, 84"	84" Wooden Bookcase	Assembly	Each

3 records found

## Using the Search Screen

1. Click the Search button  located directly next to the field you want to search.
2. Enter the maximum number of rows of data you want to display in your results. The default is "30".
3. Select one of the search choices using the dropdown. The default is "starting with".
4. Enter all or part of the value you want to search with. You may leave the search field blank to return all applicable records in the database. If there is a value in the screen field you are searching on, it will be copied to the search field. You can change the search field value on the "Search" screen.
5. Click the Search button .
6. Double click on the row you desire to load the information to the main screen.


## Modifying the View of the Search Results

To modify the view of the search results, do the following:

1. To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.
2. To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.
3. To re-size the window move your cursor over the edges of the window until you see an arrow with two heads. Click, and then still holding the mouse button down, move the cursor to increase or decrease the size of the window.

## Printing the Search Results

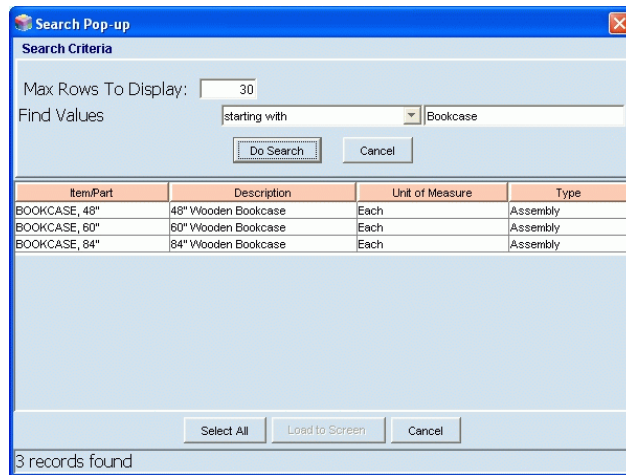
To print the search results, use these steps:

1. Click the Print button  on the "Search" screen.
2. Type or select the appropriate formatting options in the dialog box and then click "OK" to print the report.

## Search Pop-Up Screen (Tables)

Below is an example of a search pop-up screen that may be used to populate columns in the table on the screen that you are currently viewing or editing. When search results are displayed you can move the columns into different places on the search pop-up screen so that the values can be viewed in positions different from the default layout. Click the heading of the column you wish to move then drag and drop it into the desired position. Resize columns by moving the cursor over the heading until you see an arrow with two heads. Click, and with the mouse button still down, move the cursor right or left until the column is the desired width. The default layout is restored when the "Do Search" button is pressed and when you exit the search pop-up.

### Example Only:




The screenshot shows a 'Search Pop-up' dialog box with the following elements:

- Search Criteria:**
  - Max Rows To Display: 30
  - Find Values: starting with Bookcase
  - Buttons: Do Search, Cancel
- Results Table:**

Item/Part	Description	Unit of Measure	Type
BOOKCASE, 48"	48" Wooden Bookcase	Each	Assembly
BOOKCASE, 60"	60" Wooden Bookcase	Each	Assembly
BOOKCASE, 84"	84" Wooden Bookcase	Each	Assembly
- Footer:**
  - Buttons: Select All, Load to Screen, Cancel
  - Status: 3 records found

## Using the Search Pop-Up Screen

1. **Right** Click the GoTo/Selection button  in the row you want to search.
2. Enter the maximum number of rows of data you want to display in your results. The default is "30".
3. Select one of the search choices using the dropdown. The default is "starting with".
4. Enter all or part of the value you want to search with. You may leave the search field blank to return all applicable records in the database.
5. Click the "Do Search" button.
6. To select just one entry, double-click on it to populate the fields on your screen.
7. To select more than one entry, hold down the "Control" key while you click on the other selections with your mouse, then click "Load to Screen" to populate the information.
8. To load all of the entries to the screen table, click the "Select All" button and then click the "Load to Screen" button.


## Modifying the View of the Search Results

To modify the view of the search results, do the following:

1. To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.
2. To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.
3. To re-size the window move your cursor over the edges of the window until you see an arrow with two heads. Click, and then still holding the mouse button down, move the cursor to increase or decrease the size of the window.

## Printing the Search Results

To print the search results, use these steps:

1. Click the Print button  on the "Search" screen.
2. Type or select the appropriate formatting options in the dialog box and then click "OK" to print the report.

## Working with Reports

You can view, modify, and print reports by using the "Reports" menu located just above the toolbar. If "Reports" is faded gray, then there are no reports available for that screen.

### To view a report, follow these steps:

1. Click on "Reports" above the toolbar. A menu will drop down indicating which reports can be generated from that screen. Click on the report name that you want.
2. A status window will appear showing that the system is generating the report.
3. You will then see your report displayed on the screen.

### To modify and/or print a report, follow these steps:

1. Click on "Reports" above the toolbar. A menu will drop down indicating which reports can be generated from that screen. Click on the report name that you want.
2. A status window will appear showing that the system is generating the report.
3. You will then see your report displayed on the screen with this toolbar at the top:



#### **Printing Options**

Allows you to set the Page Number Prefix, number of pages wide, and the Repeat Section Header/Footer settings. Adjust the settings to your specifications and then click "OK".

#### **Page Setup**

Allows you to adjust page settings. Once finished adjusting the settings, click "OK".

#### **Print**

Allows you to select printer settings and print your report. Once finished with settings, click "OK" to print the report.

#### **Preview**

Allows you to preview your report layout before you actually print. Once finished previewing, click "Close".

#### **Excel**

Allows you to save your report as an Excel document. Once finished naming and specifying where to save your report, click "Save".

#### **Revert**

Allows you to discard all layout changes and revert to default settings. Simply click either "Yes", or "No".

#### **Help**

Shows the Report Layout Instruction screen.

In some reports the selection criteria can be changed in the report window. Adjust the selection criteria as desired, and then click the "Refresh" button to reload the data. When you exit the report you will be asked if you want to update the screen with the refreshed data from the report. Click "Yes" to update the screen or "No" to leave the screen as it was when you started the report.

Report layouts can be modified. The columns can be re-sized, hidden, and un-hidden.

To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

To hide or unhide a column right click in the report area, then select the "Column Visibility" tab. A red check mark next to the column name indicates the column will be displayed. If there is not red check mark next to the column name it will not be displayed in the report. To save the changes you have made, click the "OK" button. To discard the changes you have made, click the "Cancel" button. To reset the properties back to the default properties, click the "Revert" button located on the report toolbar. A dialog box will appear asking if you want to discard changes and revert back to default settings. Click either "Yes" to restore the defaults or "No" to keep the changes.

**Note:** Report layout changes remain in effect even after TFG4000 is restarted.

## **Working with Summary Screens and Summary Reports**

TFG4000 has many summary screens and reports available for locating data, listing data, and summarizing data. Each summary screen and report has various fields for search criteria that are used in combination with one another. The search criteria fields can use wildcards and other sophisticated SQL search techniques. For more information about wildcard characters that can be used for advanced searching, refer to the following Microsoft website:

<http://msdn.microsoft.com/library/default.asp?url=/library/en-us/off2000/html/acconWildcardCharactersS.asp>

Due to differences between Access and ANSI wildcard characters, when reading this website and using wildcards in TFG4000, substitute as follows:

% for \*  
\_ for ?  
# is not used

Also note that these wildcards cannot be used in searches.

## **Process Definition**

### **What is a Process?**

A process is a set of discrete steps necessary to perform an action. With the Process Maintenance screen, processes can be defined to support both production and service job orders. They can be as detailed as necessary to convey the information needed. The information screens allow you to enter narrative text for both the overall process and the individual operational steps for the process. In addition, the information screens allow you to attach external references in various forms. For example, it can be in the form of text that explains where the external information can be found such as a book and the page in the book; it can be an electronic document such as a spreadsheet or diagram; it can be a URL to a website, etc.

### **Process Definition Screens**

“Process Definition” consists of three tabbed screens that are used to enter and maintain process definition data. Each screen is used for specific purposes to aid in the entry and maintenance of processes.

#### **Process Maintenance**

Use this screen to define the process and enter the sequence of operations (steps) for the process.

#### **Process Information**

Use this screen to enter text information describing the process. This data may be any information you wish to store concerning the process, and multiple types of information can be stored. In addition, you can attach external references such as spreadsheets, word processing documents, diagrams, URL's, even text that explains where to find external information such as a book and the page in the book. Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

#### **Operation Information**

Use this screen to enter and maintain text information for operations associated with a process. This data may be any information you wish to store concerning the operations, such as safety issues, specific tools required, and unique material requirements. You can also attach external references such as diagrams, spreadsheets, URL's, etc. Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

#### **Process Summary**

This screen can be used to display a list of processes based on the selection criteria you use. Each row in the table represents one process with its associated data.



# Process Definition Screens Explained

## Process Maintenance Screen

Use this screen to define the process and enter the sequence of operations (steps) for the process, including "Run Time", "Setup", and "Operator Time" data. The process types are:

- Custom (Unique)**
- Master (Main Process)**
- Standard (Valid for Several Processes)**

### Current Process Data

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Process	The name of the process. A process identifies the steps necessary to perform a service or build a product.
Type	Identifies the process type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).
Description	A short description of the process or its use.
Status	Identifies the process status: Active, Future, and Inactive.
Copy To	The process number to which the current process data is to be copied. If the target process number does not exist in the database prior to requesting the copy, it is added. If it already exists and it already has operations, you can choose to replace the existing operations. Process information, process references, operations, operation information, and operation references for this process are copied.
Copy To Type	Identifies the process type for the Copy To process: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).

### Current Process Table (Run Time, Setup Time and Operator Time tabs)

<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Operation Sequence	The order that the operation should be performed in this process.
Type	Identifies the operation type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).

Description	Short description of the activity or activities involved in this operation.
Run Time	Amount of time required to complete this operation.
Run Time Unit	The measure of time used to define the operation time. The values are: Seconds, Minutes, Hours, Days and Weeks.
Run Time Quantity	Standard quantity that can be accomplished in this operation.
Setup Time	The standard time required to prepare for this operation.
Setup Time Unit	The measure of time used to define the setup time. The values are: Seconds, Minutes, Hours, Days and Weeks.
Work Center	The unique identification of the work center where the operation is to take place.
Machine	The unique identification of the machine on which the operation is to take place.
Operator Time	The manpower (operator) time needed to complete this operation.
Operator Time Unit	The measure of time used to define the operator time. The values are: Seconds, Minutes, Hours, Days and Weeks.
Operator Time Quantity	Standard quantity that can be accomplished in this operation per operator (person)
Delete	This is a checkbox to indicate you want to delete an operation from this process.


## **Message Line**

### **Field**

### **Explanation**

Message	Displays information about the current status of the screen.
---------	--

## **Accessing the Process Maintenance Screen**

1. Click the plus ("+") next to "Process/Job Order" or double-click  "Process/ Job Order" in the "NavTree".

-or-

Click on the "View" menu. Select "Goto Screen", then select "Process/ Job Order".


2. Click "Process Maintenance". The Process Maintenance screen is then displayed.

3. If there is a process in the "Process" field, the process definition for that process is displayed on the main screen.

## Using the Process Maintenance Screen

Use the following procedures to erase the screen, display, update, add, delete, display previous, display next, or copy a process and its operations.


### Erasing the Screen

To erase the data from the screen click the Erase button  located on the toolbar.


**Note:** Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

### Displaying an Existing Process and its Operations

To display a process and its operations, perform the following steps:



1. Enter a process name in the "Process" field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. The process and its operations are displayed on the main screen.

-or-

1. Use the Search button  next to the "Process" field or the "Description" field to select a process.
2. Double-click on the "Process" you would like to display in the "Search" screen table.
3. The process and its operations are displayed on the main screen.





### Updating Existing Operation Data for a Process Definition

To edit existing operation data for a process definition:

1. Display the process you wish to change. See "Displaying an Existing Process and its Operations" above.
2. Change the operation data as needed. You cannot change the "Operation Sequence" or "Type" for existing sequence steps. When adding or inserting sequence steps, enter the operation data in the first available row in the table. You can use the Add Rows button  located on the toolbar to add additional rows for entry. When the entries are saved, the operation sequences are placed in the correct sequence in the table.
3. When all of the appropriate columns are changed, click the Save button  located on the toolbar.


## Adding a New Process Definition

To add a new process definition:

1. Click the Erase button  located on the toolbar to clear the screen.
2. Select the appropriate type in the "Type" field, if desired (the default is Standard), and enter an optional process description in the "Description" field.
3. Click the Add Rows button  located on the lower right corner of the table.
4. Enter the operation sequence data in the table for each of the tabs ("Run Time", "Setup Time", and "Operator Time"). You cannot change the "Operation Sequence" and "Type" entries once the data has been saved. Leave gaps in your numbering sequence to allow for the insertion of additional steps.
5. When all of the operation data has been entered, click the Add New button  located on the toolbar. You can also enter just the process identifier in the "Process" field, and click the Add New button  located on the toolbar. This allows you to create process placeholders and then come back later and complete the process detail. See the "Copying Process Definitions" procedure for more information.


## Deleting Operation Data for an Existing Process Definition

Perform the following steps to delete the operation data for a process definition:

1. Display the process you wish to change. See "Displaying an Existing Process and its Operations" above.
2. Click the "Operator Time" tab in the table.
3. Click the "Delete" checkbox  next to the row(s) you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
4. When all of the appropriate rows are selected, click the Save button  located on the toolbar.


## Deleting a Process Definition and its Associated Data

Perform the following steps to delete the process data for a process definition:

1. Display the process you wish to delete. See "Displaying an Existing Process and its Operations" above.
2. Click the Delete button  located on the toolbar.
3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the process click "No" on the "Confirm Action" pop up message.
4. The process definition, process information, process references, operations, operation information, and operation references are deleted.  
**Note:** Once a process is deleted, it can no longer be displayed or updated.


## Displaying the Previous Process




To display the process that precedes the process currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous process and its operations are displayed on the main screen.

## Displaying the Next Process


To display the process that follows the process currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next process and its operations are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

## Copying Process Definitions

Use this procedure to copy process definition data when you have created Process Definition placeholders. Create a master process definition and then copy and make changes as needed. This procedure will copy process information, process references, operations, operation information, and operation references to the target process.

1. Display the process you wish to copy. See “Displaying an Existing Process and its Operations” above.
2. Type the target process identifier in the “Copy To” field, the target process type in the “Copy To Type” field, and then click the Copy button  located on the toolbar. The associated process operations, operation information, and operation references are copied to the target process.

## Process Definition Reports

The Process Definition screen has the following report available:

### Process Definition

Basically the same information displayed on the Process Definition screen.

For more information about viewing, modifying, and printing reports, see “Working with Reports” in the “Using TFG4000” section of this manual.

## Process Information Screen

Use this screen to enter text information describing the process. This data may be any information you wish to store concerning the process, and multiple types of information can be stored. Also, you can use this screen to reference any kind of external document such as spreadsheets, diagrams, books, websites, etc.

Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

### Current Process Data

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Process	The name of the process. A process identifies the steps necessary to perform a service or build a product.
Description	A short description of the process
Type	Identifies the process type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).

### Information Table

<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Print Job Order	This is a checkbox to indicate whether or not you want this information text to appear on the job order form.
Delete	This is a checkbox to indicate you want to delete this text record.

### Reference Table

<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System


Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Job Order Print	This is a checkbox to indicate whether or not you want this external reference to appear on the job order form. Only files with a .txt extension can be printed.
Delete	This is a checkbox to indicate you want to delete this reference record.

### Message Line

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.

### Accessing the Process Information Screen


1. Click the plus (" + ") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".
- or-
- Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".
2. If there is a process in the "Process" field, the process definition for that process is displayed on the main screen.
  3. Click "Process Information". The Process Information screen is then displayed.

## Using the Process Information Screen


Use these procedures to display, update, add, delete, display the previous, and display the next process information and references.


### Displaying Existing Process Information and References

To display process information or references, perform the following steps:

1. Enter a process in the "Process" field and click the Open (Display) button  located on the toolbar or hit the Enter key.


-or-

Use the Search button  next to the "Process" field to select a process and double-click on the "Process" you would like to display in the "Search" screen table.


2. The information text types and references for the process are displayed on the main screen.
3. To display information text, click the Goto/Selection button  in the "Text Information" column of the Text table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
4. The text will be displayed in a pop-up window.
5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.
6. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

### Updating Existing Process Information

To update existing process information, perform the following steps:

1. Display the process you want to change. See "Displaying Existing Process Information and References" above.
2. Click the Goto/Selection button  in the "Text Information" column of the Text table for the row you want to update and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
3. The text will be displayed in a pop-up window.
4. Change the desired information in the pop-up window and click "Ok" when done.
5. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document or not. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.



6. When you have finished editing all of the entries you wish to edit, click the Save button  located on the toolbar.

**Note:** You can update Process Information and References at the same time.


### Updating Existing Process References

To update existing process references, perform the following steps:

1. Display the process you want to change. See “Displaying Existing Process Information and References” above.
2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

-or-


For an electronic reference, right click the reference you want to update. Choose “Select External File”. A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the “Open” button.

3. If necessary, click the checkbox  in the “Print Job Order” column to indicate if you want this reference to appear on the job order document or not. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Process Information and References at the same time.


### Adding Process Information


To enter process information, perform the following steps:

1. Display the process you want to change. See “Displaying Existing Process Information and References” above.
2. Click an empty row in the Text Type table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

-or-

Using the dropdown list, select the Text Type in the “Text Type” column of the Information table.


4. Click the Goto/Selection button  in the “Text Information” column of the Information table for the row you want and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.
6. Enter the desired information in the pop-up window and click "Ok" when done.
7. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.
8. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Process Information and References at the same time.

### Adding Process References

To enter Process references, perform the following steps:

1. Display the process you want to change. See "Displaying Existing Process Information and References" above.
2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).


-or-

Using the dropdown list, select the Reference Type in the "Reference Type" column of the Reference table.

4. Enter the reference in the "Reference" column.

-or-


For an electronic reference, right click the reference you want to update. Choose "Select External File". A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.

5. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this reference to appear on the job order document. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
6. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Process Information and References at the same time.

## Deleting Existing Process Information and References


To delete existing process information and references, perform the following steps:

1. Display the process information and references you want to delete. See “Displaying Existing Process Information and References” above.
2. To delete text information, click the checkbox  in the “Delete” column of the Information table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
3. To delete reference information, click the checkbox  in the “Delete” column of the Reference table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** Once process information is deleted, it can no longer be displayed or updated.


## Displaying the Previous Process Information and References



To display the process information and references that precede the process information currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous process information and references are displayed on the main screen.

## Displaying the Next Process Information and References

To display the process information and references that follow the process information currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next process information and references are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by blanking out the “Process” field, then click the Next button .

## Operation Information Screen

Use this screen to enter and maintain text information for operations associated with a process. This data may be any information you wish to store concerning the operations, such as safety issues, specific tools required, and unique material requirements. For example:

**Work Center Information**  
**Tools Required**  
**Time Analysis Information**  
**Material Information**  
**Detailed Operation Information**  
**Specific Operation Instructions**

In addition, you can attach external references such as text files, spreadsheets, diagrams, URL's to websites, and text that indicates where the external information can be found such as a book and the page in the book.

Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

### Current Process Data

<u>Field</u>	<u>Explanation</u>
Process	The process identifies the steps necessary to perform a service or build a product.
Description	A short description of the process
Type	Identifies the process type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).
Operation	The operation number you want.

### Information Table

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Print Job Order	This is a checkbox to indicate whether or not you want this information text to appear on the job order form.

Delete This is a checkbox to indicate you want to delete this text record.

## Reference Table

### Column

### Explanation

Row

The line number of the row in the table.

Reference Type

A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference

Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.

Print Job Order

This is a checkbox to indicate whether or not you want this external reference to appear on the job order form. Only files with a .txt extension can be printed.

Delete

This is a checkbox to indicate you want to delete this reference record.

## Message Line


### Field

### Explanation

Message

Displays information about the current status of the screen.

## Accessing the Operation Information Screen

1. Click the plus (" + ") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".

-or-

Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".


2. If there is a process in the "Process" field, the process definition for that process is displayed on the main screen.
3. Click "Operation Information". The Operation Information screen is then displayed.

## Using the Operation Information Screen


Use these procedures to display, update, add, delete, display the previous, and display the next operation information or references.


### Displaying Existing Operation Information and References

To display operation information or references, perform the following steps:

1. Enter a process in the "Process" field and an operation number in the "Operation" field and click the Open (Display) button  located on the toolbar or hit the Enter key.



-or-

Use the Search button  next to the "Process" field to select a process and operation number and double-click on the "Operation" you would like to display in the "Search" screen table.

2. The information text types and references for the operation are displayed on the main screen.
3. To display information text, click the Goto/Selection button  in the "Text Information" column of the Text table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
4. The text will be displayed in a pop-up window.
5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.
6. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

### Updating Existing Operation Information

To update existing operation information, perform the following steps:

1. Display the operation you want to change. See "Displaying Existing Operation Information and References" above.
2. Click the Goto/Selection button  in the "Text Information" column of the Text table for the row you want to update and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
3. The text will be displayed in a pop-up window.
4. Change the desired information in the pop-up window and click "Ok" when done.
5. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Operation Information and References at the same time.


## Updating Existing Operation References

To update existing operation references, perform the following steps:

1. Display the operation you want to change. See “Displaying Existing Operation Information and References” above.
2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

-or-


For an electronic reference, right click the reference you want to update. Choose “Select External File”. A file selection dialog box appears so you can locate the directory where the electronic reference is stored. Select the file you want and click the “Open” button.

3. If necessary, click the checkbox  in the “Print Job Order” column to indicate if you want this reference to appear on the job order document or not. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Operation Information and References at the same time.


## Adding Operation Information


To enter operation information, perform the following steps:

1. Display the operation you want to change. See “Displaying Existing Operation Information and References” above.
2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

-or-

Using the dropdown list, select the Text Type in the “Info Type” column of the Information table.


4. Click the Goto/Selection button  in the “Text Information” column of the Information table for the row you want and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
5. The text will be displayed in a pop-up window.
6. Enter the desired information in the pop-up window and click “Ok” when done.

7. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.
8. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Operation Information and References at the same time.

### Adding Operation References

To enter operation references, perform the following steps:

1. Display the operation you want to change. See "Displaying Existing Operation Information and References" above.
2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).


-or-

Using the dropdown list, select the Reference Type in the "Reference Type" column of the Reference table.

4. Enter the reference in the "Reference" column.

-or-

For an electronic reference, right click the reference you want to update. Choose "Select External File". A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.

5. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this reference to appear on the job order document or not. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
6. Once finished, click the Save button  located on the toolbar.


**Note:** You can add Operation Information and References at the same time.




### Deleting Existing Operation Information and References

To delete existing operation information and references, perform the following steps:

1. Display the operation information and references you want to delete. See "Displaying Existing Operation Information and References" above.
2. To delete text information, click the checkbox  in the "Delete" column of the Information table for the row you want to delete. You may select more than one




row to be deleted at one time. Click the checkbox  again to remove the deletion flag.

3. To delete reference information, click the checkbox  in the "Delete" column of the Reference table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** Once operation information is deleted, it can no longer be displayed or updated.


### Displaying the Previous Operation Information and References



To display the operation information and references that precede the operation information currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous operation information and references are displayed on the main screen.

### Displaying the Next Operation Information and References

To display the operation information and references that follow the operation information currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next operation information and references are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by blanking out the "Process" field and the "Operation" field, then click the Next button .

## Process Summary Screen

This screen can be used to display a list of processes based on the selection criteria you use. Each row in the table represents one process with its associated data.

### Selection Criteria

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Process	The process identifies the steps necessary to perform a service or build a product.
Type	Identifies the process type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).
Description	A short description of the process.
Status	Identifies the process status: Active, Future, and Inactive.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.


### Summary Table (Primary and Secondary tabs)

<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Process	The Process identifies the steps necessary to perform a service or build a product.
Description	Short description of the activity or activities involved in this operation.
Type	Identifies the process type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).
Status	Identifies the Status of the process: Active, Future, and Inactive.

### Message Line

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Message	Displays information about the current status of the screen.

## Accessing the Process Summary Screen

1. Click the plus (“+”) next to “Process/Job Order” or double-click  “Process/Job Order” in the “NavTree”.

-or-



Click on the “View” menu. Select “Goto Screen”, then select “Process/Job Order”.

2. If there is a process in the “Process” field, the process definition for that process is displayed on the main screen.
3. Click “Process Summary”. The Process Summary screen is then displayed.

## Using the Process Summary Screen

### Displaying the Process Summary

To view the summary, perform the following steps (Steps 1 and 2 are optional):

1. Enter all or part of a process in the “Process” field, or use the Search button  next to the “Process” field to select a process.
2. Enter the number of rows you wish to view in the “Number of Rows to Display” field.
3. Click the Open (Display) button  located on the toolbar.
4. View the Process Summary information displayed on the screen.

## Process Summary Reports

The Process Summary screen has the following report available:

### Process Summary List

Basically the same information displayed on the Process Summary screen.

For more information about viewing, modifying, and printing reports, see “Working with Reports” in the “Using TFG4000” section of this manual.

# Job Order

## Initial Set up

TFG4000 Job Order Management is installed with certain features that can be changed. The features are controlled with system variables. There is a system variable you need to understand before you start using Job Order Management. See the System Variables screen in the System Administration User Guide included on the TFG4000 CD, which is available from the Windows "Start" menu or from the "Documentation" menu within TFG4000. The documentation is also available online.

Job\_Order\_Printer (installation default is "HP Laserjet Printer") – This variable indicates the default printer to be used for job order printing.

## What is a Job Order (Work Order)?

A job order identifies the need to perform some work. It can be used for both production and services. A job order can also be described as a work order. Within the job order you can identify the materials needed and the process needed to perform the task.

## Job Order Screens

"Job Order" consists of nine tabbed screens that are used to enter job orders and track the job order activity. Each individual screen is used for specific purposes of maintaining job order functions.

### Job Order

This screen is used to enter and maintain job order data. This includes the basic information about the job order such as the description, quantity, start date, due date, status, and quantity complete. It also contains the item to be built (or service to be provided), the job order bill of materials (BOM) item number, and the job order process.

If TFG4000 Inventory Management is installed and the "Full BOM" checkbox is selected, the "Parts" screen displays a summary of the items contained in a multi-level bill of material. Each item is listed once with the total quantity needed. Maintenance of the original bill of materials must be done using the Inventory Management "Bill of Materials" screen.

If TFG4000 Inventory Management is installed and the "Reserve Material" checkbox is selected, the components required for the job order (as defined in the job order parts list) will be updated to reflect the reserved quantity.

**Note:** The reserve quantity **does not** restrict the usage of the components by another job order or inventory transaction.

### Information

This screen is used to create and maintain job order text information. This data may be any information you wish to store concerning the job order, including external references such as text documents, spreadsheets, diagrams, URL's, etc. Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

## **Parts**

This screen is used to maintain job order bill of material component data. A bill of materials is used to list the parts needed to build an item in a production job order, or the items needed to complete a service job order. You can add components to the list, change data for existing components, or delete components from the table. Any changes made to the bill of materials are for this job order only and do not affect an existing bill of material (in TFG4000 Inventory Management).

If TFG4000 Inventory Management is not installed, each BOM is associated with a specific job order. To use the BOM in other job orders it must be copied into the other job orders.

If TFG4000 Inventory Management is installed, the items and bills of materials can be pre-defined and accessed from any job order.

If TFG4000 Inventory Management is installed, and the "Full BOM" checkbox is selected on the "Job Order" screen, the "Job Order BOM" screen displays a summary of the items needed in a multi-level bill of material including any lower level bill of materials. Each item is listed once with the total quantity needed. If the "Full BOM" checkbox is not selected on the "Job Order" screen, the "Job Order BOM" screen displays only the items needed for the selected bill of material (single level).

## **Process**

This screen is used to maintain process operations for the displayed job order. You can change process information specific to the displayed job order. Operation data for the process is displayed in a table. Changes made to the source process (using Process Definition) are not reflected in the job order process unless the process is refreshed in the job order. Also, changes made to the process using the "Job Order Process" screen are not reflected in the source process.

## **Process Information**

Use this screen to enter additional text information concerning the displayed job order. The data may be any information you wish to store concerning the job order process, and multiple types of information can be stored. Changes made to the source process information (using Process Definition) are not reflected in the job order process information, unless the process is deleted from the job order and then re-accessed. Also, changes made to the job order process information using the "Job Order Process Information" screen are not reflected in the source process information.

The Reference table provides a means to attach or view external documents. You can either view the documents by using the appropriate application or select the path to the file and place it in the Reference table. You can also enter references to physical documents such as books and maps, for example "Book A, page 45".

Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

## **Operation Information**

Use this screen to enter text information for operation steps associated with a job order process. This data may be any information you wish to store concerning the operation, such as safety issues, specific tools required, and unique material requirements. Changes made to the source operation information (Using Process Definition) are not reflected in the job order operation information, unless the process is refreshed on the job order. Also, changes made to the job order process information using the "Job Order Operation Information" screen are not reflected in the source operation information.

The Reference table provides a means to attach or view external documents. You can either view the documents by using the appropriate application or select the path to the file and place it in the Reference table. You can also enter references to physical documents such as books and drawings, for example "Drawing 828-1B".

Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

### **Picking**

This screen is used to issue the quantity of a component used for the job order. Each component needed in the job order is displayed in a table. The "Quantity Required" field shows the remaining quantity needed for the job order. When the "Issue Quantity" field is used, the "Quantity Required" field is decremented by the value in the "Issue Quantity" field and a component history audit trail record is written. Also, if TFG4000 Inventory Management is installed, the on hand inventory for the component is updated and an inventory transaction audit trail record is written.

### **Component History**

This screen is used to display the history information for components used in a job order. It shows the activity that has occurred for each component on the job order.

### **Job Order Summary**

This screen is used to display a list of job orders associated with the item/part in the "Item/Part" field based on selection criteria entered.

### **Shortage**

This screen is used to display the components for a job order along with current inventory and reserve so you can determine if you have enough inventory available to satisfy the job order. Applicable only if TFG4000 Inventory Management is installed and used.

# Job Order Screens Explained

## Job Order Screen

This screen is used to enter and maintain job order data. This includes the basic information about the job order such as the description, quantity, start date, due date, status, and quantity complete. It also contains the item to be built (or service to be provided), job order bill of material (BOM) item, and the job order process.

### Current Job Order Data

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Quantity	The total quantity of the job order Item/Part required to complete this job order.
Status	Identifies the job order status: Active, Closed, and Released.
Required Start	The calendar date that determines when materials are required for the job order. It is the date when the job order should be started.
Type	Defines the job order type: Production or Service.
Due Date	The calendar date on which the job order is planned to be completed.
Quantity Complete	The quantity of the job order Item/Part that has been completed for the job order.

### Job Order Item/Part

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Item/Part	Unique identification of a service, assembly, purchased part, component, facility, tool, material, etc.
Type	Defines the job order Item/Part type for example: Assembly, Commodity, Consumable, Fabricated, Industrial Supplies, Office Supplies, Purchased Assembly, Purchased Part, Purchased Tool, Raw Material, Service, Subassembly, or Tool.
Description	A short description of the job order or its use.

Unit of Measure	Defines how the item is counted or measured. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of units of measure are "Ounce", "Pound", and "Hour".
Completed	Field for reporting the quantity of the job order item completed. The quantity entered is used to update the "Quantity Complete" in the Current Job Order Data section at the top of the screen and to update inventory for the job order item.
Location	Field for indicating the inventory location to use when reporting completed quantities. This location will be updated with the quantity reported in the "Completed" field (see "Completed" field above).

**Note:** Reporting job order item quantity completed does not update the inventory for the individual components on the job order bill of materials. Component inventory is managed with the "Picking" screen.

**Select Bill of Materials and Process**

<u>Field</u>	<u>Explanation</u>
Item/Part	The item number for the Bill of Material to be used for the job order. This item number may or may not be the same as the job order item. If TFG4000 Inventory Management is installed the item does not have to exist on the Item Master and the Bill of Material can be modified on the job order if necessary without affecting the original Bill of Material. If TFG4000 Inventory Management is not installed, the bill of material must be entered manually using the "Parts" screen.
Type	Defines the Bill of Material Item/Part type. The type helps further define an item by giving it a classification. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Description	The description of the Bill of Material item number to be used for this job order.
Unit of Measure	Defines how the item is counted or measured. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of units of measure are "Ounce", "Pound", and "Hour".




Full BOM	If TFG4000 Inventory Management is installed and the "Full BOM" checkbox is selected, the "Parts" screen displays a summary of the items contained in a multi-level bill of material. Each item is listed once with the total quantity needed. Maintenance of the original bill of materials must be done using the TFG4000 Inventory Management "Bill of Materials" screen.
Reserve Material	If TFG4000 Inventory Management is installed and the "Reserve Material" checkbox is selected, the components required for the job order (as defined in the job order parts list) will be updated to reflect the reserved quantity.  <b>Note:</b> The reserve quantity <b>does not</b> restrict the usage of the components by another job order or inventory transaction.
Process	The process identifies the steps necessary to perform a service or build a product.
Type	Identifies the process type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).
Description	A short description of the process or its use.

### Message Line


<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.

### Accessing the Job Order Screen

1. Click the plus ("+") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".  
  
-or-  
  
Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".
2. Click "Job Order". The Job Order screen is then displayed.
3. If there is a job order in the "Job Order" field, the job order definition for that job order is displayed on the main screen.

## Using the Job Order Screen

The Job Order number is defined by the system and uses the next available job order number.

If TFG4000 Inventory Management is not installed, the bill of material (if defined) is only for the associated job order. You must copy the job order using the Copy button  to use the bill of material in other job orders. Once you copy the job order, you can change the bill of material information for the specific job order.

If TFG4000 Inventory Management is installed, the source bill of material can be defined in the database using the Inventory Management "Bill of Materials" screen, and referenced from multiple job orders. Any maintenance to the source bill of material needs to be performed using the Inventory Management "Bill of Materials" screen.

### Full BOM

If TFG4000 Inventory Management is installed, and the "Full BOM" checkbox is selected on the "Job Order" screen, a multi-level bill of material is displayed as a summarized bill of material on the "Parts" screen. A summarized bill of material displays a list of all of the components in the multi-level bill of material, regardless of level, with the total quantity of each component needed. See the "Inventory Management User's Guide" for more information about multi-level bills of material and summarized bills of material.

### Reserve Material

If TFG4000 Inventory Management is installed and the "Reserve Material" checkbox is selected, the components required for the job order (as defined in the job order parts list) will be updated to reflect the reserved quantity. The use of Reserve Material is solely at the discretion of the user. Reserve material selection is on a job order by job order basis and is used as a temporary assignment of the material sometimes referred to as a "Soft Assignment". Designating material as Reserve Material does not in any way restrict the use of that material for any reason.

To fully understand the intended use of Reserve Material, it is best to review the Job Order Shortage screen and its usage. Two main concepts to grasp: 1) the "Reserve Quantity" column is the total quantity of that component reserve material system wide; 2) the "Required Quantity" column is the quantity needed only for the job order being analyzed.

The use of Reserve Material depends on the definitions of the Bills of Materials used in the specific job orders. The feature is not recommended for "Common Components" as it works best with project or order specific components. If the Reserved Material feature is to be used for "Common Components", then it should be selected for **all** job orders.


Example of Reserve Material usage: you are manufacturing a customized product. You have defined a "Sales" Bill of Materials with only very product specific components. You receive an order for the product, so you create a Job Order using the "Sales" Bill of Materials. You set the reserve material feature flag to "On" for this job order. This job order is for Sales analysis only and will not be used to perform the actual manufacturing process. Now assume another order is being considered for the same product. Now a second job order may be created with the same bill of materials. By reviewing the Job Order Shortage screen you will be in a position to perform a manual analysis of the second job order requirements.

**Note:** The reserve quantity **does not** restrict the usage of the components by another job order or inventory transaction.

## Procedures

Use these procedures to erase the screen, display, update, add, delete, view previous, view next, copy, and print job orders.


### Erasing the Screen

To erase the data from the screen click the Erase button  located on the toolbar.


**Note:** Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

### Displaying an Existing Job Order

To display a job order, perform the following steps:


1. Enter a job order in the "Job Order" field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. The job order data is displayed on the main screen.

-or-

1. Use the Search button  next to the "Job Order" field, "Description" field, "Status" field, "Required Start" field, or the "Type" field to select a job order.
2. Double-click on the "Job Order" you would like to display in the "Search" screen table.
3. The job order data is displayed on the main screen.

### Searching for Job Orders by Job Order Item


To search for job orders by the job order item, perform the following steps:

1. Use the second Search button  next to the "Item/Part" field in the Job Order Item/Part section of the screen.
2. Select the type of search you want using the dropdown provided. The default is to search for orders with job order item numbers "starting with" the value you entered.
3. Enter the item number you want to use in the field provided or make it blank to search by all item numbers.
4. Click the "Search" button. The results of your search are displayed in the pop-up.
5. You can re-size the columns and re-size the search window by moving the cursor until a double-headed arrow appears, then clicking and while holding the mouse button down, move the cursor to re-size. You can re-position columns by clicking on them and while holding the mouse button down, move the cursor right or left.

6. Print results by clicking the "Print" button. A standard print dialog box is displayed so you can choose the printer and other print options; click "OK" to print.
7. Double-click an order to display that order on the main screen.


### **Searching for Job Orders by Job Order Item Description**

To search for job orders by the job order item description, perform the following steps:

1. Use the second Search button  next to the "Description" field in the Job Order Item/Part section of the screen.
2. Select the type of search you want using the dropdown provided. The default is to search for orders with job order item descriptions "starting with" the value you entered.
3. Enter the item description you want to use in the field provided or make it blank to search by all item descriptions.
4. Click the "Search" button. The results of your search are displayed in the pop-up.
5. You can re-size the columns and re-size the search window by moving the cursor until a double-headed arrow appears, then clicking and while holding the mouse button down, move the cursor to re-size. You can re-position columns by clicking on them and while holding the mouse button down, move the cursor right or left.
6. Print results by clicking the "Print" button. A standard print dialog box is displayed so you can choose the printer and other print options; click "OK" to print.
7. Double-click an order to display that order on the main screen.

### **Searching for Job Orders by Bill of Material Item**


To search for job orders by bill of material item, perform the following steps:

1. Use the second Search button  next to the "Item/Part" field in the Select Bill of Material Item and Process section of the screen.
2. Select the type of search you want using the dropdown provided. The default is to search for orders with bill of material item numbers "starting with" the value you entered.
3. Enter the item number you want to use in the field provided or make it blank to search by all item numbers.
4. Click the "Search" button. The results of your search are displayed in the pop-up.
5. You can re-size the columns and re-size the search window by moving the cursor until a double-headed arrow appears, then clicking and while holding the mouse button down, move the cursor to re-size. You can re-position columns by clicking on them and while holding the mouse button down, move the cursor right or left.
6. Print results by clicking the "Print" button. A standard print dialog box is displayed so you can choose the printer and other print options; click "OK" to print.

7. Double-click an order to display that order on the main screen.


### **Searching for Job Orders by Bill of Material Item Description**

To search for job orders by bill of material item description, perform the following steps:

1. Use the second Search button  next to the "Description" field just below the "Item/Part" field in the Select Bill of Material Item and Process section of the screen.
2. Select the type of search you want using the dropdown provided. The default is to search for orders with bill of material item descriptions "starting with" the value you entered.
3. Enter the item description you want to use in the field provided or make it blank to search by all item descriptions.
4. Click the "Search" button. The results of your search are displayed in the pop-up.
5. You can re-size the columns and re-size the search window by moving the cursor until a double-headed arrow appears, then clicking and while holding the mouse button down, move the cursor to re-size. You can re-position columns by clicking on them and while holding the mouse button down, move the cursor right or left.
6. Print results by clicking the "Print" button. A standard print dialog box is displayed so you can choose the printer and other print options; click "OK" to print.
7. Double-click an order to display that order on the main screen.


### **Searching for Job Orders by Process**

To search for job orders by the process used, perform the following steps:

1. Use the second Search button  next to the "Process" field in the Select Bill of Material Item and Process section of the screen.
2. Select the type of search you want using the dropdown provided. The default is to search for orders with process names "starting with" the value you entered.
3. Enter the process you want to use in the field provided or make it blank to search by all process names.
4. Click the "Search" button. The results of your search are displayed in the pop-up.
5. You can re-size the columns and re-size the search window by moving the cursor until a double-headed arrow appears, then clicking and while holding the mouse button down, move the cursor to re-size. You can re-position columns by clicking on them and while holding the mouse button down, move the cursor right or left.
6. Print results by clicking the "Print" button. A standard print dialog box is displayed so you can choose the printer and other print options; click "OK" to print.
7. Double-click an order to display that order on the main screen.


## Searching for Job Orders by Process Description

To search for job orders by the process description, perform the following steps:

1. Use the second Search button  next to the "Description" field just below the Process field in the Select Bill of Material Item and Process section of the screen.
2. Select the type of search you want using the dropdown provided. The default is to search for orders with process descriptions "starting with" the value you entered.
3. Enter the process description you want to use in the field provided or make it blank to search by all process descriptions.
4. Click the "Search" button. The results of your search are displayed in the pop-up.
5. You can re-size the columns and re-size the search window by moving the cursor until a double-headed arrow appears, then clicking and while holding the mouse button down, move the cursor to re-size. You can re-position columns by clicking on them and while holding the mouse button down, move the cursor right or left.
6. Print results by clicking the "Print" button. A standard print dialog box is displayed so you can choose the printer and other print options; click "OK" to print.
7. Double-click an order to display that order on the main screen.



## Updating an Existing Job Order

To update a job order, perform the following steps:

1. Display the job order number you want to change. See "Displaying an Existing Job Order" above.
2. Change the desired information on the main screen.
3. Once finished, click the Save button  located on the toolbar.
4. If "Full BOM" is changed (checked/unchecked) or if the Bill of Material Item/Part has been changed and there is already a parts list on the job order, a box will pop up asking "The Job Order has a Bill of Material, do you want to delete or replace it?" If you click "Yes" and the new Bill of Material Item/Part has a bill of material (TFG4000 Inventory Management must be installed), the parts list on the job order is deleted and replaced with a new parts list. If you click "Yes" and either TFG4000 Inventory Management is not installed or the Bill of Material Item/Part does not have a bill of material, the job order parts list is deleted. If you click "No", the Bill of Material Item/Part is not updated on the job order and the parts list is not changed.
5. If the Process has been changed and there are already job order operations on the job order, a box will pop up asking "Job Order has a Process, do you want to replace or delete it?" If you click "Yes" and the new Process has operations, the job order operations are deleted and the new operations are added. If you click "Yes" and the new Process does not have any operations, the job order operations are deleted. If you click "No", the Process name is not updated on the job order and the job order operations are not changed.


## Adding a New Job Order

To add a new job order:

1. Click the Erase button  located on the toolbar to clear the screen.
2. Enter any of the optional job order data you want.
3. When all of the data has been entered, click the Save button  located on the toolbar.

## Deleting a Job Order and its Associated Data


Perform the following steps to delete a job order and all of the data associated with it:

1. Display the job order you wish to delete. See "Displaying an Existing Job Order" above.
2. Click the Delete button  located on the toolbar.
3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to delete the job order click "No" on the "Confirm Action" pop up message.
4. The job order definition, job order information, job order parts, job order process, job order process information, job order process references, job order operations, job order operation information, job order operation references, job order picking data, and job order component history are deleted.

**Note:** Once a job order is deleted, it can no longer be displayed or updated.


## Displaying the Previous Job Order




To display the job order that precedes the job order currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous job order is displayed on the main screen.

## Displaying the Next Job Order


To display the job order that follows the job order currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next job order is displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

## Copying a Job Order

Use this procedure to copy a job order to a new job order.

1. Display the job order you wish to copy. See "Displaying an Existing Job Order" above.
2. Click the Copy button  located on the toolbar. The associated job order data (including job order parts, job order process, job order process information, job order process references, job order operations, job order operation information, and job order operation references) is copied to a new job order number generated by the system. **Note:** Job order information and job order component history are not copied.

## Job Order Reports

The Job Order screen has the following report available:

### Job Order Form

A formatted report of the job order.

The following Job Order information is displayed on the form:

<b>Job Order Data</b>	Job order number, description, required start date, required complete date, and status.
<b>Job Order Item/Part</b>	The product or service to be built or performed.
<b>Parts Kit Process</b>	A list of all parts needed for the job order Identifier, type, description, and list of all operational steps.
<b>Job Order text information</b>	Text entered on the Job order Information screen and selected to be printed on the job order form.
<b>Job Order external file(s)</b>	External references entered on the Job Order Information screen and selected to be printed on the job order form. Only the contents of files with a .txt extension can be printed.
<b>Process text information</b>	Text entered on the Job Order Process screen and selected to be printed on the job order form.
<b>Process external file(s)</b>	External references entered on the Job Order Process Information screen and selected to be printed on the job order form. Only the contents of files with a .txt extension can be printed.
<b>Operation test information</b>	Text entered on the Job Order Operation screen and selected to be printed on the job order form.
<b>Operation external file(s)</b>	External references entered on the Job Order Operation Information screen and selected to be printed on the job order form. Only the contents of files with a .txt extension can be printed.



For more information about viewing, modifying, and printing reports, see “Working with Reports” in the “Using TFG4000” section of this manual.

## Job Order Information Screen

This screen is used to create and maintain job order information text. This data may be any information you wish to store concerning the job order. Also, you can use this screen to reference any kind of external document such as spreadsheets, diagrams, books, websites, etc.

Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

### Current Job Order

<u>Field</u>	<u>Explanation</u>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Status	Identifies the job order status: Active, Closed, and Released.

### Information Table

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Type	Indicates the type of text information. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Print Job Order	This is a checkbox to indicate whether or not you want this information text to appear on the job order form.
Delete	This is a checkbox to indicate you want to delete this text record.

### Reference Table

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Reference Type	Indicates the type of external reference information. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Reference	Directory and file name for an electronic reference, URL

for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.

Print Job Order

This is a checkbox to indicate whether or not you want this external reference to appear on the job order form. Only files with a .txt extension can be printed.


Delete

This is a checkbox to indicate you want to delete this reference record.

### Message Line

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.

### Accessing the Job Order Information Screen

1. Click the plus (" + ") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".

-or-

Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".


2. If there is a job order in the "Job Order" field, the job order definition for that job order is displayed on the main screen.
3. Click "Information". The Job Order Information screen is then displayed.

## Using the Information Screen


Use these procedures to display, update, add, delete, display the previous, and display the next job order information and references.


### Displaying Existing Job Order Information and References

To display job order information and references, perform the following steps:

1. Enter a job order in the "Job Order" field and click the Open (Display) button  located on the toolbar or hit the Enter key.


-or-

Use the Search button  next to the "Job Order" field, "Description" field or the "Status" field to select a job order and double-click on the "Job Order" you would like to display in the "Search" screen table.

2. The information text types and references for the job order number are displayed on the main screen.
3. To display information text, click the Goto/Selection button  in the "Text Information" column of the Text table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
4. The text will be displayed in a pop-up window.
5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.
6. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

### Updating Existing Job Order Information

To update existing job order information, perform the following steps:

1. Display the job order number that has the data you want to change. See "Displaying Existing Job Order Information and References" above.
2. Click the "Type" column of the Information table for the row you want to update.
3. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document or not. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.
4. Change the desired information in the Text table in the center of the screen.
5. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Information and References at the same time.


## Updating Existing Job Order References

To update existing job order references, perform the following steps:

1. Display the job order number that has the data you want to change. See "Displaying Existing Job Order Information and References" above.
2. Enter the new reference in the "Reference" column of the Reference table for the row or rows you wish to update.

-or-


For an electronic reference, right click the reference you want to update. Choose "Select External File". A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.

3. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this reference to appear on the job order document or not. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Job Order Information and References at the same time.


## Adding Job Order Information

To enter job order information, perform the following steps:


1. Display the job order number you want. See "Displaying Existing Job Order Information and References" above.
2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

-or-

Using the dropdown list, select the Text Type in the "Info Type" column of the Information table.

4. Click the Goto/Selection button  in the "Text Information" column of the Information table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
5. The text will be displayed in a pop-up window.
6. Enter the desired information in the pop-up window and click "Ok" when done.
7. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document. When this


box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.

8. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Job Order Information and References at the same time.

### Adding Job Order References

To enter job order references, perform the following steps:

1. Display the job order number you want. See “Displaying Existing Job Order Information and References” above.
2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).


-or-

Using the dropdown list, select the Reference Type in the “Reference Type” column of the Reference table.

4. Enter the reference in the “Reference” column.

-or-

For an electronic reference, right click the reference you want to update. Choose “Select External File”. A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the “Open” button.


5. If necessary, click the checkbox  in the “Print Job Order” column to indicate if you want this reference to appear on the job order document. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
6. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Job Order Information and References at the same time.

### Deleting Existing Job Order Information and References

To delete existing job order information and references, perform the following steps:


1. Display the job order number that has the data you want to delete. See “Displaying Existing Information and References” above.
2. To delete text information, click the checkbox  in the “Delete” column of the Information table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.

3. To delete reference information, click the checkbox  in the "Delete" column of the Reference table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** Once job order information is deleted, it can no longer be displayed or updated.


### Displaying the Previous Job Order Information and References



To display the job order information and references that precede the job order information and references currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous job order information and references are displayed on the main screen.

### Displaying the Next Job Order Information and References

To display the job order information and references that follow the job order information and references currently displayed, perform the following steps:


1. Click the Next button  located on the toolbar.
2. The next job order information and references are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by blanking out the "Job Order" field, then click the Next button .

## Parts Screen

This screen is used to maintain job order bill of materials (BOM) component data. A bill of materials is used to list the parts needed to build an item in a production job order, or the items needed to complete a service order. You can add components to the list, change data for existing components, or delete components from the table. Any changes made to the bill of materials are for this job order only.

If TFG4000 Inventory Management is not installed, each bill of materials is associated with a specific job order. To use the bill of materials in other job orders it must be copied into the other job orders.

If TFG4000 Inventory Management is installed, the items and bills of materials can be pre-defined and accessed from any job order. Changes made to the source bill of material in TFG4000 Inventory Management are not reflected in existing job orders; however, the job order bill of materials can be replaced with the updated source bill by using the refresh button  located on the toolbar.

If TFG4000 Inventory Management is installed, and the "Full BOM" checkbox is selected on the "Job Order" screen, the "Job Order BOM" screen displays a summary of the items needed in a multi-level bill of material including any lower level bill of materials. Each item is listed once with the total quantity needed. If the "Full BOM" checkbox is not selected on the "Job Order" screen, the "Job Order BOM" screen displays the items needed for the selected bill of materials.

### Current Job Order Data

<u>Field</u>	<u>Explanation</u>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Required Start	The calendar date that determines when materials are required for the job order. It is the date when the job order should be started.
Required Complete	The calendar date on which the job order is required to be completed.
Job Order Type	Defines the job order type: Production or Service.
Job Order Status	Indicates the job order status: Active, Closed, and Released.

### BOM Item/Part

<u>Field</u>	<u>Explanation</u>
Item/Part	The item number for the Bill of Materials to be used for the job order. If TFG4000 Inventory Management is installed, the item does not have to exist on the Item Master and the Bill of Material can be modified on the job order if necessary without affecting the original Bill of Material.



Description The description of the Bill of Material item number to be used for this job order.

**Components Table** (Components and Description tabs)


<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Component	Unique identification of a service, assembly, purchased part, component, facility, tool, material, etc.
Quantity	This field is the quantity required to produce one unit of the parent Item/Part.
Unit of Measure	Defines how the item is counted or measured. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of units of measure are "Ounce", "Pound", and "Hour".
Component Type	Defines the component type. The type helps further define an item by giving it a classification. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Delete	This is a checkbox to indicate you want to delete a component from the job order bill of material.
Description	Contains information describing the item. This description can be as short as an abbreviation or a long detailed description of the item.

**Note:** If TFG4000 Inventory Management is installed, the components can be pre-defined using Item definition so that the component information does not have to be entered each time you use the component on a job order.

**Message Line**

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen

## Accessing the Parts Screen

1. Click the plus (“+”) next to “Process/Job Order” or double-click  “Process/Job Order” in the “NavTree”.

-or-

Click on the “View” menu. Select “Goto Screen”, then select “Process/Job Order”.


2. If there is a job order in the “Job Order” field, the job order definition for that job order is displayed on the main screen.
3. Click “Parts”. The Parts screen is then displayed.

## Using the Parts Screen


Use these procedures to display, update, add, delete, display previous, display next, and refresh parts on the job order.

### Displaying Parts on the Job Order

To display parts for a job order, perform the following steps:


1. Enter a job order in the “Job Order” field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. The parts for the job order number are displayed on the main screen.

-or-

1. Use the Search button  next to the “Job Order” field, “Description” field, “type” field or the “Status” field to select a job order.
2. Double-click on the “Job Order” you would like to display in the “Search” screen table.
3. The parts for the job order number are displayed on the main screen.




### Updating Existing Parts on the Job Order

To update existing parts on the job order, perform the following steps:

1. Display the job order number you want to change. See “Displaying Parts on the Job Order” above.
2. Make changes to the part information in the Components table
3. Once finished, click the Save button  located on the toolbar.


## Adding Parts to a Job Order

To enter parts on a job order, perform the following steps:

1. Display the job order number you want to change. See “Displaying Parts on the Job Order” above.
2. Click an empty row in the Components table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. In the Components table, enter or select the desired information. If TFG4000 Inventory Management is installed, you can use the Goto/Selection button  to select a component. The “Description”, “Unit of Measure”, and “Component Type” columns are filled in when you select an item.
4. Once finished, click the Save button  located on the toolbar.


## Deleting Existing Parts on the Job Order

To delete existing parts from the job order, perform the following steps:

1. Display the job order number you want to delete. See “Displaying Parts on the Job Order” above.
2. To delete component information, click the checkbox  in the “Delete” column of the Components table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
3. Once finished, click the Save button  located on the toolbar.

## Deleting All of the Parts on the Job Order


To delete all of the parts from the job order, perform the following steps:

1. Display the job order number parts list you want to delete. See “Displaying Parts on the Job Order” above.
2. Click the Delete button  located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the parts list, click “No” on the “Confirm Action” pop up message.

**Note:** Once the parts list is deleted, it can no longer be displayed or updated.


## Displaying the Previous Parts List



To display the parts on the job order that precedes the job order currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous job order parts are displayed on the main screen.

## Displaying the Next Parts List


To display the parts on the job order that follows the job order currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next job order parts are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by blanking out the "Job Order" field, then click the Next button .

## Refreshing All of the Parts on the Job Order

This procedure can be used only if TFG4000 Inventory Management is installed. To delete all of the parts on the job order and replace them with parts from the original bill of materials, perform the following steps:

1. Display the job order number parts list you want to refresh. See "Displaying Existing Parts on the Job Order" above.
2. Click the Refresh button  located on the toolbar.
3. Click the "Yes" button on the "Confirm Action" pop up message. If you do not want to refresh the parts list, click "No" on the "Confirm Action" pop up message.

**Note:** TFG4000 Inventory Management must be installed, the original bill of material must exist in TFG4000 Inventory Management, and it must be referenced by the job order on the "Job Order Maintenance" screen as the "Bill of Material Item/Part" before the parts list can be refreshed. If TFG4000 Inventory Management is not installed and the bill of materials does not exist or it is not referenced on the job order, the job order parts will be deleted and no parts will be added to replace them.

## Job Order Parts Reports

The Job Order Parts screen has the following report available:

### Job Order Parts List Report

Basically the same information displayed on the Job Order Parts screen.

For more information about viewing, modifying, and printing reports, see "Working with Reports" in the "Using TFG4000" section of this manual.

## Job Order Process Screen

This screen is used to maintain process operations for the displayed job order. You can change process information specific to the displayed job order. Operation data for the job order process is displayed in a table. Changes made to the source process (using Process Definition) are not reflected in the job order process unless the job order process is refreshed. Also, changes made to the process using the "Job Order Process" screen are not reflected in the source process.

### Current Job Order Data

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Required Start	The calendar date that determines when materials are required for the job order. It is the date when the job order should be started.
Required Complete	The calendar date on which the job order is required to be completed.
Type	Defines the job order type: Production or Service.
Status	Indicates the job order status: Active, Closed, and Released.

### Process

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Process	The process identifies the steps necessary to perform a service or build a product.
Type	Identifies the process type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).

### Operations Table (Primary and Secondary tabs)


<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Operation	The order/sequence that the operation should be performed in this process. This is also referred to as the operation number.
Type	Identifies the operation type: Custom (Unique), Master (Main Process), and Standard (Valid for Several Processes).

Status	The current status of the operation: Open, Running, or Completed.
Description	Short description of the activity or activities involved in this operation.
Run Time	Amount of time required to complete this operation.
Run Time Unit	The measure of time used to define the operation time. The values are: Seconds, Minutes, Hours, Days and Weeks.
Run Time Quantity	Standard quantity that can be accomplished in this operation.
Work Center	The unique identification of the work center where the operation is to take place.
Delete	This is a checkbox to indicate you want to delete an operation record.
Setup Time	The standard time required to prepare for this operation.
Setup Time Unit	The measure of time used to define the setup time. The values are: Seconds, Minutes, Hours, Days and Weeks.
Operator Time	The manpower (operator) time needed to complete this operation.
Operator Time Unit	The measure of time used to define the operator time. The values are: Seconds, Minutes, Hours, Days and Weeks.
Operator Time Quantity	Standard quantity that can be accomplished in this operation per operator (person)
Machine	The unique identification of the machine on which the operation is to take place.

## Message Line

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.

## Accessing the Process Screen

1. Click the plus (“+”) next to “Process/Job Order” or double-click  “Process/Job Order” in the “NavTree”.

-or-

Click on the “View” menu. Select “Goto Screen”, then select “Process/Job Order”.


2. If there is a job order in the "Job Order" field, the job order definition for that job order is displayed on the main screen.
3. Click "Process". The Job Order Process screen is then displayed.

## Using the Job Order Process Screen


Use these procedures to display, delete, view the previous, view the next, and refresh job order processes; and to display, update, add, and delete operations on a job order process.

### Displaying a Job Order Process and its Operations

To display a job order process and its operations, perform the following steps:


1. Enter a job order in the "Job Order" field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. The job order process and its operations are displayed on the main screen.
4. The job order operations are displayed in the Operations table. Use the scroll bar on the right to display more rows if necessary.


-or-

1. Use the Search button  next to the "Job Order" field, "Description" field, "Type" field or the "Status" field to select a job order.
2. Double-click on the "Job Order" you would like to display in the "Search" screen table.
3. The job order process and its operations are displayed on the main screen.
4. The job order operations are displayed in the Operations table. Use the scroll bar on the right to display more rows if necessary.

### Adding Job Order Operations




To add operations to a job order:

1. Display the job order process you wish to change. See "Displaying a Job Order Process and its Operations" above.
2. Select the appropriate type in the "Type" field, if desired (the default is Standard), and enter an optional process description in the "Description" field.
3. Enter the operation sequence data in the table for each of the tabs ("Run Time", "Setup Time", and "Operator Time"). You cannot change the "Operation Sequence" and "Type" entries once the data has been saved. Leave gaps in your numbering sequence to allow for the insertion of additional steps.
4. Click the Add Rows button  located on the lower right corner of the table to add more rows for operations if necessary.

5. When all of the operation data has been entered, click the Save button  located on the toolbar.


### Deleting Job Order Operations

Perform the following steps to delete job order operations:

1. Display the job order process you wish to change. See “Displaying a Job Order Process and its Operations” above.
2. Click the “Delete” checkbox  next to the row(s) you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
3. When all of the appropriate rows are selected, click the Save button  located on the toolbar.

### Deleting a Job Order Process Definition and its Associated Data


Perform the following steps to delete the job order process including job order operations, job order process information, job order process references, job order operation information, and job order operation references:

1. Display the job order process you wish to delete. See “Displaying a Job Order Process and its Operations” above.
2. Click the Delete button  located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the job order process click “No” on the “Confirm Action” pop up message.
4. The job order process, job order process information, job order process information, job order process references, job order operations, job order operation information, and job order operation references are deleted.

**Note:** Once job order process data is deleted, it can no longer be displayed or updated.

### Displaying the Previous Job Order Process


To display the job order process that precedes the job order process currently displayed, perform the following steps:




1. Click the Previous button  located on the toolbar.
2. The previous job order process and its operations are displayed on the main screen.



## Displaying the Next Job Order Process


To display the job order process that follows the job order process currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next job order process and its operations are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

## Refreshing Job Order Operations

To delete the operations on the job order and replace them with the operations from the original process, perform the following steps:

1. Display the job order process you wish to refresh. See “Displaying a Job Order Process and its Operations” above.
2. Click the Refresh button  located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to refresh the operations, click “No” on the “Confirm Action” pop up message.

**Note:** The process and operations must be defined with the “Process Definition” screen for the job order operations to be refreshed. If the process and/or operations do not exist, the job order operations will be deleted and will not be replaced.

## Job Order Process Reports

The Job Order Process screen has the following report available:

### Job Order Process Report

Basically the same information displayed on the Job Order Process screen.

For more information about viewing, modifying, and printing reports, see “Working with Reports” in the “Using TFG4000” section of this manual.

## Job Order Process Information Screen

Use this screen to enter additional text information concerning the displayed job order process. The data may be any information you wish to store concerning the job order process, and multiple types of information can be stored. Changes made to the source process information (using Process Definition) are not reflected in the job order process information, unless the job order process is refreshed. Also, changes made to the job order process information using the "Job Order Process Information" screen are not reflected in the source process.

The Reference table provides a means to attach or view external documents. You can either view the documents by using the appropriate application or select the file and place it in the Reference table.

Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

### Current Job Order

<u>Field</u>	<u>Explanation</u>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Status	Indicates the job order status: Active, Closed, and Released.

### Information Table

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Type	Indicates the type of text information. Additional text types may be added using the Dropdown Control screen.
Text Information	This is where you enter text information or view text that has already been entered.
Print Job Order	This is a checkbox to indicate whether or not you want this information text to appear on the job order form.
Delete	This is a checkbox to indicate you want to delete this text record.

### Reference Table

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience.


You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Print Job Order	This is a checkbox to indicate whether or not you want this reference to appear on the job order form. Only files with a .txt extension can be printed.
Delete	This is a checkbox to indicate you want to delete this reference record.

### Message Line

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Message	Displays information about the current status of the screen.

### Accessing the Job Order Process Information Screen

1. Click the plus (" + ") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".

-or-

Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".


2. If there is a job order in the "Job Order" field, the job order definition for that job order is displayed on the main screen.
3. Click "Process Information". The Job Order Process Information screen is then displayed.

## Using the Job Order Process Information Screen


Use these procedures to display, update, add, delete, display the previous, and display the next job order process information or references.


### Displaying Existing Job Order Process Information and References

To display job order process information and references, perform the following steps:

1. Enter a job order in the "Job Order" field and click the Open (Display) button  located on the toolbar or hit the Enter key.


-or-


Use the Search button  next to the "Job Order" field, "Description" field or the "Status" field to select a job order and double-click on the "Job Order" you would like to display in the "Search" screen table.

3. The information text types and references for the job order process are displayed on the main screen.
4. To display information text, click the Goto/Selection button  in the "Text Information" column of the Information table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
5. The text will be displayed in a pop-up window.
6. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.
7. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

### Updating Existing Job Order Process Information

To update existing job order process information, perform the following steps:

1. Display the job order process you want to change. See "Displaying Existing Job Order Process Information and References" above.
2. Click the Goto/Selection button  in the "Text Information" column of the Information table for the row you want to update and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
3. The text will be displayed in a pop-up window.
4. Change the desired information in the pop-up window and click "Ok" when done.
5. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document or not. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.

6. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Job Order Process Information and References at the same time.


### Updating Existing Job Order Process References

To update existing job order process references, perform the following steps:

1. Display the job order process you want to change. See “Displaying Existing Job Order Process Information and References” above.
2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

-or-

For an electronic reference, right click the reference you want to update. Choose “Select External File”. A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the “Open” button.


4. If necessary, click the checkbox  in the “Print Job Order” column to indicate if you want this reference to appear on the job order document or not. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
5. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Job Order Process Information and References at the same time.

### Adding Job Order Process Information



To enter job order process information, perform the following steps:

To enter job order process information, perform the following steps:

1. Display the job order process you want to change. See “Displaying Existing Job Order Process Information and References” above.
2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

-or-


Using the dropdown list, select the Text Type in the “Info Type” column of the Information table.

4. Click the Goto/Selection button  in the "Text Information" column of the Information table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
5. The text will be displayed in a pop-up window.
6. Enter the desired information in the pop-up window and click "Ok" when done.
7. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.
8. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Job Order Process Information and References at the same time.

### Adding Job Order Process References

To enter job order process references, perform the following steps:

1. Display the job order process you want to change. See "Displaying Existing Job Order Process Information and References" above.
2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).


-or-

Using the dropdown list, select the Reference Type in the "Reference Type" column of the Reference table.

4. Enter the reference in the "Reference" column.

-or-


For an electronic reference, right click the reference you want to update. Choose "Select External File". A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.

5. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this reference to appear on the job order document. When this box is checked, the text will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
6. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Process Information and References at the same time.

## Deleting Existing Job Order Process Information and References


To delete existing job order process information and references, perform the following steps:

1. Display the job order reference you want to delete. See “Displaying Existing Job Order Process Information and References” above.
2. To delete text information, click the checkbox  in the “Delete” column of the Information table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
3. To delete reference information, click the checkbox  in the “Delete” column of the Reference table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** Once job order process information is deleted, it can no longer be displayed or updated.


## Displaying the Previous Job Order Process Information and References



To display the job order process information and references that precede the job order process currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous job order process information and references are displayed on the main screen.

## Displaying the Next Job Order Process Information and References

To display the job order process information and references that follow the job order process currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next job order process information and references are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by blanking out the “Job Order” field, then click the Next button .

## Job Order Operation Information Screen

Use this screen to enter text information for operation steps associated with a job order process. This data may be any information you wish to store concerning the operation, such as safety issues, specific tools required, and unique material requirements. Changes made to the source operation information (Using Process Definition) are not reflected in the job order operation information, unless the process is refreshed from the original process. Also, changes made to the job order process information using the "Job Order Operation Information" screen are not reflected in the source operation information.

The Reference table provides a means to attach or view external documents. You can either view the documents by using the appropriate application or select the file and place it in the Reference table.

Information text can be selected to print on the job order form. External references may also be selected to print on the job order form; however, only external reference files with a .txt extension can be printed.

### Current Job Order

<u>Field</u>	<u>Explanation</u>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Status	Indicates the job order status: Active, Closed, and Released.
Operation	The order that the operation should be performed in this process. Also referred to as operation number.

### Information Table

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Type	Indicates the type of text information. Additional text types may be added using the Dropdown Control screen.
Text Information	This is where you enter text information or view text that has already been entered.
Print Job Order	This is a checkbox to indicate whether or not you want this information text to appear on the job order form.
Delete	This is a checkbox to indicate you want to delete this text record.




## Reference Table

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Print Job Order	This is a checkbox to indicate whether or not you want this reference to appear on the job order form. Only files with a .txt extension can be printed.
Delete	This is a checkbox to indicate you want to delete this reference record.

## Message Line

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.

## Accessing the Operation Information Screen


1. Click the plus (" + ") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".  
  
-or-  
  
Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".
2. If there is a job order in the "Job Order" field, the job order definition for that job order is displayed on the main screen.
3. Click "Operation Information". The Job Order Operation Information screen is then displayed.

## Using the Job Order Operation Information Screen


Use these procedures to display, update, add, delete, display the previous, and display the next job order operation information and references.


### Displaying Existing Job Order Operation Information and References

To display job order operation information and references, perform the following steps:

1. Enter a job order in the "Job Order" field and a job order operation number in the "Operation" field then click the Open (Display) button  located on the toolbar or hit the Enter key.


-or-


Use the Search button  next to the "Job Order" field, "Description" field or the "Status" field to select a job order. In the search screen table, double-click on the "Job Order" you would like to display. Then enter a job order operation number in the "Operation" field.

2. The information text types and references for the job order operation are displayed on the main screen.
3. To display information text, click the Goto/Selection button  in the "Text Information" column of the Information table for the row you want to display and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
4. The text will be displayed in a pop-up window.
5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.
6. To view electronic references, right click on the reference you would like to display. Choose "Goto External Application" from the menu.

### Updating Existing Job Order Operation Information

To update existing job order operation information, perform the following steps:

1. Display the job order operation you want to change. See "Displaying Existing Job Order Operation Information and References" above.
2. Click the Goto/Selection button  in the "Text Information" column of the Information table for the row you want to update and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
3. The text will be displayed in a pop-up window.
4. Change the desired information in the pop-up window and click "Ok" when done.

5. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document or not. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.
6. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Job Order Operation Information and References at the same time.


### Updating Existing Job Order Operation References

To update existing job order operation references, perform the following steps:

1. Display the job order operation you want to change. See "Displaying Existing Job Order Operation Information and References" above.
2. Enter the new reference in the "Reference" column of the Reference table for the row or rows you wish to update.

-or-


For an electronic reference, right click the reference you want to update. Choose "Select External File". A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.

3. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this reference to appear on the job order document or not. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** You can update Job Order Operation Information and References at the same time.



### Adding Job Order Operation Information

To enter job order operation information, perform the following steps:

1. Display the job order operation you want to change. See "Displaying Existing Job Order Operation Information and References" above.
2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

-or-


Using the dropdown list, select the Text Type in the "Info Type" column of the Information table.

4. Click the Goto/Selection button  in the "Text Information" column of the Information table for the row you want and select "Edit Information Text" on the menu that appears. Use the scroll bar on the right to display more rows if necessary.
5. The text will be displayed in a pop-up window.
6. Enter the desired information in the pop-up window and click "Ok" when done.
7. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this information text to appear on the job order document. When this box is checked, the text will appear on the job order document. Click the checkbox  again to remove the print flag.
8. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Job Order Operation Information and References at the same time.

### Adding Job Order Operation References

To enter job order operation references, perform the following steps:

1. Display the job order operation you want to change. See "Displaying Existing Job Order Operation Information and References" above.
2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button  in the lower right corner of the table.
3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).


-or-

Using the dropdown list, select the Reference Type in the "Reference Type" column of the Reference table.

4. Enter the reference in the "Reference" column.

-or-

For an electronic reference, right click the reference you want to update. Choose "Select External File". A file selection dialog will appear so you can locate the directory that contains the file you want. Select the file you want and click the "Open" button.


4. If necessary, click the checkbox  in the "Print Job Order" column to indicate if you want this reference to appear on the job order document. When this box is checked, the reference will appear on the job order document if possible. Click the checkbox  again to remove the print flag.
5. Once finished, click the Save button  located on the toolbar.

**Note:** You can add Job Order Operation Information and References at the same

time.

### Deleting Job Order Operation Information and References


To delete existing job order operation information and references, perform the following steps:

1. Display the job order operation information and references you want to delete. See "Displaying Existing Job Order Operation Information and References" above.
2. To delete text information, click the checkbox  in the "Delete" column of the Information table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
3. To delete reference information, click the checkbox  in the "Delete" column of the Reference table for the row you want to delete. You may select more than one row to be deleted at one time. Click the checkbox  again to remove the deletion flag.
4. Once finished, click the Save button  located on the toolbar.

**Note:** Once job order operation information is deleted, it can no longer be displayed or updated.


### Displaying the Previous Job Order Operation Information and References



To display the job order operation information and references that precede the job order operation currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. The previous job order operation information and references are displayed on the main screen.

### Displaying the Next Job Order Operation Information and References

To display the job order operation information and references that follow the job order operation currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next job order operation information and references are displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by blanking out the "Job Order" field, then click the Next button .

## Picking Screen

This screen is used to display what is still needed to complete the job order and to issue the quantity of a component used for the job order. Each component needed in the job order is displayed in a table. The "Quantity Required" field shows the remaining quantity needed for the job order. When the "Issue Quantity" field is used, the "Quantity Required" field is decremented by the value in the "Issue Quantity" field and a component history audit trail record is written. Also, if TFG4000 Inventory Management is installed, the on hand inventory for the component is updated and an inventory transaction audit trail record is written.

### Current Job Order Data

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Quantity	The total quantity of the Job Order Item/Part required to complete this job order.
Status	Indicates the job order status: Active, Closed, and Released.
Required Start	The calendar date that determines when materials are required for the job order. It is the date when the job order should be started.
Type	Defines the job order type: Production or Service.
Due Date	The calendar date on which the job order is planned to be completed.
Quantity Complete	The quantity of the Job Order Item/Part that has been completed for a job order.

### Picking Table ( Primary and Secondary tabs)


<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Component	Unique identification of a service, assembly, purchased part, component, facility, tool, material, etc.
Quantity Required	The number of units of the component remaining to be picked, retrieved, or selected (issued) for this job order.
Location	Identification of the inventory location where inventory is stored for this Component. (Displayed only if TFG4000 Inventory Management is installed.)
Onhand Quantity	The number of units that are on hand in this inventory location for this Component. (Displayed only if TFG4000 Inventory Management is installed.)

Issue Quantity	The number of units of the component to be picked, retrieved, or selected (issued) for this job order.
Description	Short description of the item needed to be picked, retrieved, or selected (issued) for this job order.
Job Quantity	The total quantity of the component required to complete this job order.
Unit of Measure	Defines how the item is counted or measured. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of units of measure are "Ounce", "Pound", and "Hour".
Type	Defines the component type. The type helps further define an item by giving it a classification. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.

## Message Line

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Message	Displays information about the current status of the screen.

## Accessing the Picking Screen


1. Click the plus ("+") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".
- or-
- Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".
2. If there is a job order in the "Job Order" field, the job order definition for that job order is displayed on the main screen.
  3. Click "Picking". The Picking screen is then displayed.

## Using the Picking Screen


Use these procedures to display job order picking data, pick (issue) components for a job order, display the previous job order pick list, and display the next job order pick list.

### Displaying Job Order Picking Data

To display job order picking data, perform the following steps:

1. Enter a job order in the "Job Order" field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. The job order picking data displayed on the main screen.

-or-

1. Use the Search button  next to the "Job Order" field, "Description" field, "Type" field or the "Status" field to select a job order.
2. Double-click on the "Job Order" you would like to display in the "Search" screen table.
3. The job order picking data displayed on the main screen.


### Picking Components

To pick (issue) components for a job order, perform the following steps:

1. Display the job order number you need. See "Displaying Job Order Picking Data" above.
2. Enter the quantity you wish to pick for a component in the "Issue Quantity" column of the Picking table


-or-

Click the "Pick All" button to issue the remaining quantity for all components.

3. Once finished, click the Save button  located on the toolbar.

### Displaying the Previous Job Order Picking Data


To display the job order picking data that precedes the job order picking data currently displayed, perform the following steps:



1. Click the Previous button  located on the toolbar.
2. The previous job order picking data is displayed on the main screen.



## Displaying the Next Job Order Picking Data

To display the job order picking data that follows the job order picking data currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. The next job order picking data is displayed on the main screen.

**Tip:** You can use the Next button  as a convenient way to locate the first record in the database. Start by blanking out the "Job Order" field, then click the Next button .

## Job Order Picking Reports

The Job Order Picking screen has the following report available:

### **Job Order Picking Report**

Basically the same information displayed on the Job Order Picking screen.

For more information about viewing, modifying, and printing reports, see "Working with Reports" in the "Using TFG4000" section of this manual.

## Component History Screen

This screen is used to display the history information for components used in a job order.

### Current Job Order Data

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Quantity	The total quantity of the Job Order Item/Part required to complete this job order.
Status	Indicates the job order status: Active, Closed, and Released.
Required Start	The calendar date that determines when materials are required for the job order. It is the date when the job order should be started.
Type	Defines the job order type: Production or Service.
Due Date	The calendar date on which the job order is planned to be completed.
Quantity Complete	The quantity of the Job Order Item/Part that has been completed for a job order.

### Component Table (Component and Description tabs)


<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Component	Unique identification of a service, assembly, purchased part, component, facility, tool, material, etc.
Issued Quantity	The number of units of the component that were used or consumed (issued) for this job order.
Returned Quantity	The number of units of the component that were returned to inventory for this job order.
Scrapped Quantity	The number of units of the component that were not usable and could not be returned to inventory for this job order.
Unit of Measure	Defines how the item is counted or measured. Some examples of units of measure are Bag", "Carton" and "Feet".

Status	The most recent activity for this component on this job order. The values are: Issued, Returned, Scrapped, Deleted and Updated.
Job Quantity	The total quantity of the Component required to complete this job order.
Description	A short description of the job order or its use.

### Message Line

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.


### Accessing the Component History Screen

1. Click the plus (“+”) next to “Process/Job Order” or double-click  “Process/Job Order” in the “NavTree”.
- or-
- Click on the “View” menu. Select “Goto Screen”, then select “Process/Job Order”.
2. If there is a job order in the “Job Order” field, the job order definition for that job order is displayed on the main screen.
  3. Click “Component History”. The Component History screen is then displayed.


## Using the Component History Screen

### Displaying Component History

To view component history, perform the following steps:

1. Enter a job order in the "Job Order" field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. The job order component history is displayed on the main screen.

-or-

1. Use the Search button  next to the "Job Order" field, "Description" field, "Type" field or the "Status" field to select a job order.
2. Double-click on the "Job Order" you would like to display in the "Search" screen table.
3. The job order component history is displayed on the main screen.

### Job Order Component History Reports

The Job Order Component History screen has the following report available:

#### **Job Order Component History Report**

Basically the same information displayed on the Job Order Component History screen.

For more information about viewing, modifying, and printing reports, see "Working with Reports" in the "Using TFG4000" section of this manual.

## Job Order Summary Screen

This screen is used to display a list of job orders associated with the item/part in the "Item/Part" field.

### Selection Criteria

<u>Field</u>	<u>Explanation</u>
Item/Part	Unique identification of a service, assembly, purchased part, component, facility, tool, material, etc.
Job Order Type	Defines the job order type: Production or Service.
Job Order Status	Indicates the job order status: Active, Closed, and Released.
Number of Items to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.


### Summary Table (Primary and Secondary)

<u>Column</u>	<u>Explanation</u>
Row	The line number of the row in the table.
Job Order	A system generated number that identifies a job order.
Item/Part	Job Order Item/Part. It is a unique identification of a service, assembly, purchased part, component, facility, tool, material, etc.
Job Order Description	A short description of the job order or its use.
Job Order Type	The type helps further define a job order by giving it a classification. Some examples of types are: "Production" and "Service".
Job Order Status	Indicates the status of the job order. The values are: "Active", "Closed", and "Released".
Current Quantity	The total quantity of the Job Order Item/Part required to complete this job order.
Unit of Measure	Defines how the item is counted or measured. Some examples of units of measure are Bag", "Carton" and "Feet".

## Message Line

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.



## Accessing the Job Order Summary Screen

1. Click the plus (“+”) next to “Process/Job Order” or double-click  “Process/Job Order” in the “NavTree”.
- or-
- Click on the “View” menu. Select “Goto Screen”, then select “Process/Job Order”.
2. If there is a job order in the “Job Order” field, the job order definition for that job order is displayed on the main screen.
3. Click “Summary”. The Summary screen is then displayed.

## Using the Job Order Summary Screen

### Displaying the Job Order Summary

To view the job order summary, perform the following steps (Steps 1, 2, 3, and 4 are optional):

1. Enter all or part of a and item number in the “Item/Part” field, or use the Search button  next to the “Item Part” field to select an item number.
2. Select the type of job order you want to display in the “Job Order Type” field or leave that field blank to select any type of job order.
3. Select the status of the job orders you want to display in the “Job Order Status” field or leave that field blank to select job orders with any status.
4. Enter the number of items you wish to view in the “Number of Items to Display” field.
5. Click the Open (Display) button  located on the toolbar.
6. View the Job Order Summary information displayed on the screen.

## Job Order Summary Reports

The Job Order Summary screen has the following report available:

### Job Order Summary Report

Basically the same information displayed on the Job Order Summary screen.

For more information about viewing, modifying, and printing reports, see “Working with Reports” in the “Using TFG4000” section of this manual.

## Shortage Screen

This screen is used to display the components on a job order with current inventory and reserve quantities so you can determine if you have enough inventory available to complete the job order.

**Note:** This screen is applicable only if TFG4000 Inventory Management is installed and used.

### Selection Criteria

<b><u>Field</u></b>	<b><u>Explanation</u></b>
Job Order	A system generated number that identifies a job order.
Description	A short description of the job order or its use.
Quantity	The total quantity of the job order Item/Part required to complete this job order.
Status	Identifies the job order status: Active, Closed, and Released.
Required Start	The calendar date that determines when materials are required for the job order. It is the date when the job order should be started.
Type	Defines the job order type: Production or Service.
Due Date	The calendar date on which the job order is planned to be completed.
Quantity Complete	The quantity of the job order Item/Part that has been completed for the job order.
Reserve Material	Indicates if the Reserve Material option was selected for this order.

### Summary Table (Primary and Secondary)


<b><u>Column</u></b>	<b><u>Explanation</u></b>
Row	The line number of the row in the table.
Component	Unique identification of a service, assembly, purchased part, component, facility, tool, material, etc.
Onhand Quantity	Current inventory level for this item.
Required Quantity	The number of units of this component remaining to be picked.
Reserve Quantity	Total quantity of the component reserved.

Available/Short	How much of the on hand quantity may be available for this job order. If the quantity is negative, there is a shortage.
Component Description	Contains information describing the component item.
Component Type	Defines the component type. The type helps further define an item by giving it a classification. Some examples of types are: "Assembly" something you build, "Service" for a service you provide, "Tool" for something you use in your operation.
Job Quantity	The number of units of this component needed to complete the job order.
Unit of Measure	Defines how the item is counted or measured. Some examples of units of measure are "Ounce", "Pound", and "Hour".

## Message Line

<u>Field</u>	<u>Explanation</u>
Message	Displays information about the current status of the screen.


## Accessing the Shortage Screen

1. Click the plus (" + ") next to "Process/Job Order" or double-click  "Process/Job Order" in the "NavTree".
- or-
- Click on the "View" menu. Select "Goto Screen", then select "Process/Job Order".
2. If there is a job order in the "Job Order" field, the job order definition for that job order is displayed on the main screen.
  3. Click "Shortage". The Shortage screen is then displayed.



## Using the Shortage Screen


### Erasing the Screen

To erase the data from the screen click the Erase button  located on the toolbar.


**Note:** Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

### Displaying an Existing Job Order

To display a job order, perform the following steps:


1. Enter a job order in the "Job Order" field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. The job order data is displayed on the main screen.

-or-


1. Use the Search button  next to the "Job Order" field, "Description" field or the "Status" field to select a job order.
2. Double-click on the "Job Order" you would like to display in the "Search" screen table.
3. The job order data is displayed on the main screen.

### Displaying the Job Order Shortage Information

To view the job order shortage information, perform the following steps (Steps 1, 2, 3, and 4 are optional):


1. Enter a job order in the "Job Order" field.
2. Click the Open (Display) button  located on the toolbar or hit the Enter key.
3. View the job order shortage information displayed on the screen.

-or-

1. Use the Search button  next to the "Job Order" field, "Description" field, "Status" field, or the "Type" field to select a job order.
2. Double-click on the "Job Order" you would like to display in the "Search" screen table.
3. View the job order shortage information displayed on the screen.


## **Displaying Shortage Information for the Previous Job Order**

To display the shortage information for the job order that precedes the job order currently displayed, perform the following steps:

1. Click the Previous button  located on the toolbar.
2. Shortage information for the previous job order is displayed on the main screen.

## **Displaying Shortage Information for the Next Job Order**

To display the shortage information for the job order that follows the job order currently displayed, perform the following steps:

1. Click the Next button  located on the toolbar.
2. Shortage information for the next job order is displayed on the main screen.

## **Job Order Shortage Reports**

The Job Order Shortage screen has the following report available:

### **Job Order Shortage Report**

Basically the same information displayed on the Job Order Shortage screen.

For more information about viewing, modifying, and printing reports, see "Working with Reports" in the "Using TFG4000" section of this manual.

## Advanced Installation

TFG4000 provides some advanced installation functionality such as: font sizes, system variables, server start up options, BAT file options for single user and multi user modes.

Please refer to the System Administration User Guide for more information.

## Documentation

TFG4000 documentation (in PDF format) is available online at [www.tfg4000.com](http://www.tfg4000.com), through the "Documentation" menu on each screen, or from the Windows "Start" menu. Simply click "Start", then "Programs", then "TFG4000 V1.4", and then "Documentation".

**Note:** PDF files require Adobe® Acrobat® Reader. The reader is available at [www.adobe.com](http://www.adobe.com) free of charge.

## Registration

**Quick & Easy Online:** After installation, you can go to our web page at [www.tfg4000.com](http://www.tfg4000.com) to register the product. Click on "Register" and follow the instructions.

## Suggestions

We are eager to improve TFG4000, and we urge you to tell us what you think of the software and how it could be improved to better suit your needs. We have taken many suggestions from our customers and incorporated them into our products. If you have suggestions or comments, please send an e-mail to [tfg4000@fredrickgroup.com](mailto:tfg4000@fredrickgroup.com). We want to hear from you!

## Services

The Fredrick Group, Inc. offers assistance in data conversion. For more information, contact The Fredrick Group, Inc. directly by either:

**E-mail** Send an e-mail to [tfg4000@fredrickgroup.com](mailto:tfg4000@fredrickgroup.com), with 'Services' in the subject line.

**Phone** Call **770-844-8516** between 8:30 AM - 5:00 PM ET.

## Support

**Note:** You must be registered in order to receive support.

### Initial Installation Support

The Fredrick Group, Inc. provides free initial installation support via e-mail. Installation support is available for 30 days, and is activated when you send your first message. You may also receive installation support by calling, but you must pay the cost of the call. Technicians are available on a limited basis Monday through Friday from 8:30 am to 5:00 pm Eastern time. The TFG4000 product technical support number is **770-844-8516**.

### Pay-As-You-Go Support

Additional fee-based support is available. You pay the cost of the call plus an additional fee. Credit card information must be provided and confirmed before a call is accepted. Technicians are available on a limited basis Monday through Friday from 8:30 am to 5:00 pm Eastern time. The TFG4000 product technical support number is **770-844-8516**.

Contact The Fredrick Group, Inc. at [tfg4000@fredrickgroup.com](mailto:tfg4000@fredrickgroup.com) for more details.

### Other Support Options

Other support options are available.

Contact The Fredrick Group, Inc. at [tfg4000@fredrickgroup.com](mailto:tfg4000@fredrickgroup.com) for more details.

**Note:** Support plans and fees are subject to change without notice.

## TFG4000 Software Series

You can obtain the following TFG4000 applications by visiting your nearest retailer:

- Inventory Management
- Job Order Management
- Sales Order Management
- Purchasing Management

For more information go to [www.tfg4000.com](http://www.tfg4000.com).