

## **ARC 6342: Modify 5988 to add Work Order Comments (Plus other features)**

### **Sunbelt Design and Development**

#### **Description:**

Sunbelt needed modifications made to custom PO dashboard 5988 as a “one stop shop” for purchasing. Goal of the dashboard is to effectively replace core APOG dashboard, as loading time for that is too long.

#### **List of Changes:**

(All changes were made to Purchase to Job tab, as that’s what Sunbelt uses)

- Handful of bug fixes w 5988, including PO auto numbering not getting assigned to correct number, not saving user selection on PO creation options, and ordinals not being read from all selected rows after selecting then creating a PO via right click context menu.
- Display comments from Work order material sequences
  - Make these Editable, write back to PO line when generated
- Display long part instead of short part on Purchase to Job tab
- Made due date editable (Does not write back to core, but will write to PO when created)
- Keep work order sequence lines on the dashboard (sequences were dropping off before once commitments were being met. Now stays until the entire job is closed via WIP > FG)
  - Added check to not allow user to create PO if sequence is flagged as closed
- Have browse vendor checkbox checked automatically
- Anchoring outside service requests grid (resize w/ window)
- Added “Load Cost” Button. This significantly improves loading time of Purchase to job tab
  - User will need to apply filter to the grid and then load cost
- Changed default PO creation option to be “Group by Vendor” (still saves last selection user made)
- Added row coloring to selected lines (selected if select box is checked)
- Clicking on WO Suffix will bring up core issue material screen if the “Issue Material” Checkbox is checked, otherwise just opens up the Work Order in view mode.
- Added row coloring rules (yellow, white, or red) depending on the state of the WO being closed or not
- Add “Estimated Unit Cost” Column (reads in “Burden” field from JOB\_OPERATIONS)

## Features:

- Display comments from Work order material sequences
  - Make these Editable & write back to WO sequence & to PO line when generated

The screenshot displays the 'Purchasing Dashboard (PLA)' interface of Global Shop Solutions ERP Software. The main table lists work order material sequences with columns for Select, Long Part, Description, Loc, GL Acct, Mfg Part, Mfg Name, Comments, and Notes. A red box highlights the 'Comments' column, and a red arrow points to a modal window titled 'WO Comments: 45-0131 000400 (PLA)'. The modal contains a text area for 'Test comments' and 'Save' and 'Exit' buttons. Below the main table, there are sections for 'Demand' and 'Vendors'.

**Global Shop SOLUTIONS ERP SOFTWARE**

Completed. Cutoff Date: 1/18/2022

Purchase To Stock Drop Ship POs Requisitions Purchase To Jobs Outside Service Requests

Options: PO History Cost Group POs by Ven... Do Not Email

Open PO Maintenance after Auto PO Grouped Created Load Cost Purch Action Req

Select	Long Part	Description	Loc	GL Acct	Mfg Part	Mfg Name	Comments	Notes
→	45-0131	ASSY: AUSPEX HARNESS					Test com...	
	45-0131	ASSY: AUSPEX HARNESS						
	45-0131	ASSY: AUSPEX HARNESS						
	45-0131	ASSY: AUSPEX HARNESS						
	45-0131	ASSY: AUSPEX HARNESS						
	45-0131	ASSY: AUSPEX HARNESS						
	45-0131	ASSY: AUSPEX HARNESS						

**WO Comments: 45-0131 000400 (PLA)**

Test comments

Save Exit

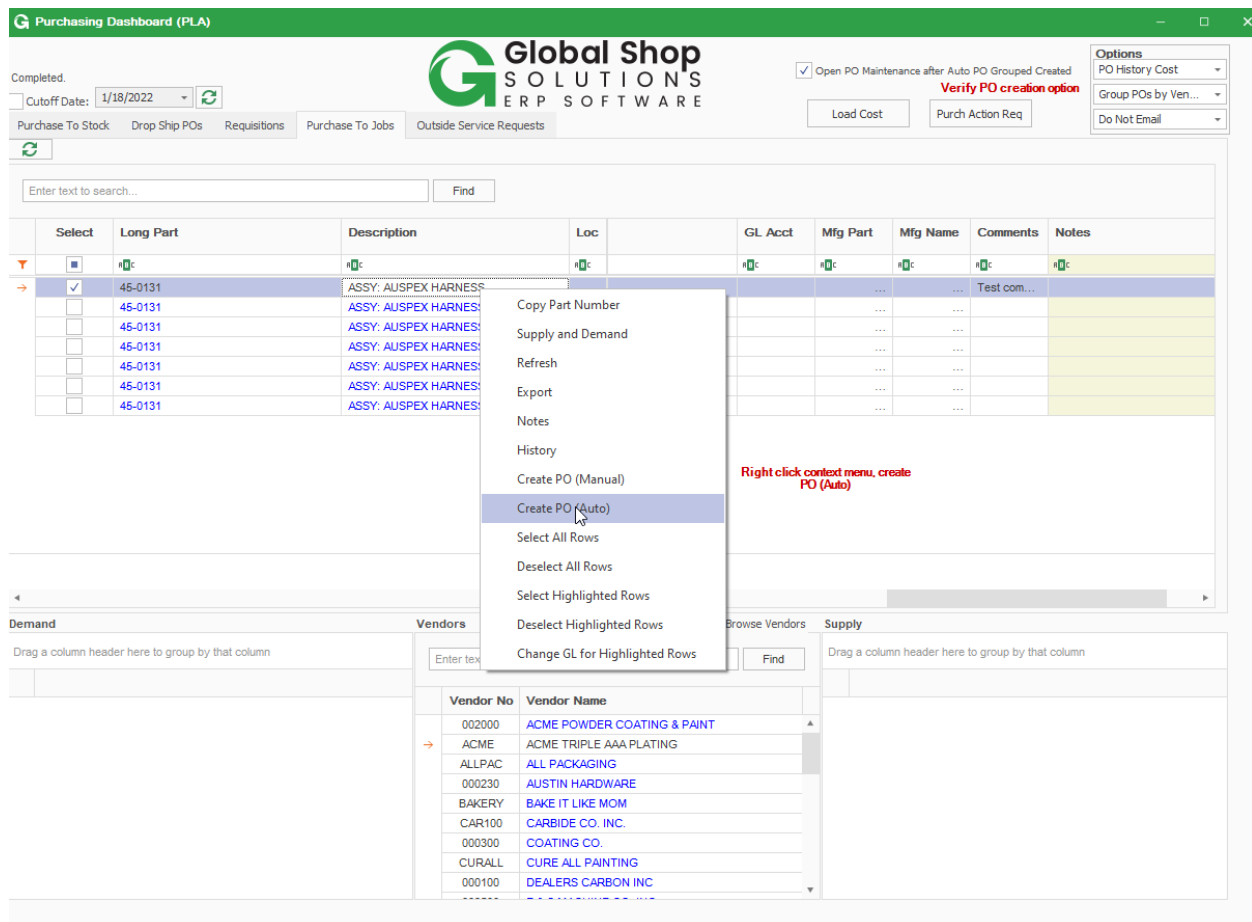
**Demand**

Drag a column header here to group by that column

**Vendors**

Drag a column header here to group by that column

Vendor No	Vendor Name
002000	ACME POWDER COATING & PAINT
→ ACME	ACME TRIPLE AAA PLATING
ALLPAC	ALL PACKAGING
000230	AUSTIN HARDWARE
BAKERY	BAKE IT LIKE MOM
CAR100	CARBIDE CO. INC.
000300	COATING CO.
CURALL	CURE ALL PAINTING
000100	DEALERS CARBON INC



- **\*\*NOTE\*\*:** Ensure that all lines selected has the “Vendor Name” column filled out prior to creating a PO, otherwise, program will not create one for it
- Core PO Edit screen will pop up after. Any edits can be made to this PO here, but regardless if user saves on this core screen or not, PO will be created.
- **PO Creation Options:**
  - Group POs by Vendor
    - All selected POs will be created grouped by vendors i.e. having multiple lines selected with the same vendor will add a line to the same PO, and bring up a new PO for each unique vendor.
  - Individual POs
    - All lines, regardless of which vendors are chosen, will have a PO created for them, each with one line
- Added “Load Cost” Button. This significantly improves loading time of Purchase to job tab
  - User will need to apply filter to the grid and then load cost

Before Load Cost (No filter applied, means all lines on screen will have cost loaded, just set a filter prior to running cost to have it only run for those).

**Purchasing Dashboard (PLA)**

Completed. Cutoff Date: 1/18/2022

**Global Shop SOLUTIONS ERP SOFTWARE**

☒ Open PO Maintenance after Auto PO Grouped Created

Options: PO History Cost, Group POs by Ven..., Do Not Email

Purchase To Stock Drop Ship POs Requisitions Purchase To Jobs Outside Service Requests

Load Cost Purch Action Req

Enter text to search... Find

Select	Long Part	Description	Loc	red	Cost	Extension	Vendor	Vendor Name	POs
→	45-0131	ASSY: AUSPEX HARNESS		1.00	0.00	0.00	AUSTIN H...		
	45-0131	ASSY: AUSPEX HARNESS		0.00	0.00	0.00	AUSTIN H...		0000041-001
	45-0131	ASSY: AUSPEX HARNESS		0.00	0.00	0.00	AUSTIN H...		0000020-001,000
	45-0131	ASSY: AUSPEX HARNESS		0.00	0.00	0.00	AUSTIN H...		0000044-001
	45-0131	ASSY: AUSPEX HARNESS		0.00	0.00	0.00	AUSTIN H...		
	45-0131	ASSY: AUSPEX HARNESS		0.00	0.00	0.00	AUSTIN H...		
	45-0131	ASSY: AUSPEX HARNESS		0.00	0.00	0.00	AUSTIN H...		
	45-0131	ASSY: AUSPEX HARNESS		0.00	0.00	0.00	AUSTIN H...		

\$ 0.00

Demand Vendor ☒ Browse Vendors Supply

Drag a column header here to group by that column

Enter text to search... Find

Vendor No	Vendor Name
→ 002000	ACME POWDER COATING & PAINT
ACME	ACME TRIPLE AAA PLATING
ALLPAC	ALL PACKAGING
000230	AUSTIN HARDWARE
BAKERY	BAKE IT LIKE MOM
CAR100	CARBIDE CO. INC.
000300	COATING CO.
CURALL	CURE ALL PAINTING
000100	DEALERS CARBON INC

Drag a column header here to group by that column

After Load Cost

**Purchasing Dashboard (PLA)**

Completed. Cutoff Date: 1/18/2022

**Global Shop SOLUTIONS ERP SOFTWARE**

☒ Open PO Maintenance after Auto PO Grouped Created

Options: PO History Cost, Group POs by Ven..., Do Not Email

Purchase To Stock Drop Ship POs Requisitions Purchase To Jobs Outside Service Requests

Load Cost Purch Action Req

Enter text to search... Find

Select	Long Part	Description	Loc	sued	Required	Cost	Extension	Vendor	Vendor Name
→	45-0131	ASSY: AUSPEX HARNESS		0.00	1.00	26.50	26.50	AUSTIN H...	
	45-0131	ASSY: AUSPEX HARNESS		00.00	500.00	26.50	13,250.00	AUSTIN H...	
	45-0131	ASSY: AUSPEX HARNESS		0.00	100.00	26.50	2,650.00	AUSTIN H...	
	45-0131	ASSY: AUSPEX HARNESS		0.00	500.00	26.50	13,250.00	AUSTIN H...	
	45-0131	ASSY: AUSPEX HARNESS		0.00	250.00	26.50	6,625.00	AUSTIN H...	
	45-0131	ASSY: AUSPEX HARNESS		0.00	500.00	26.50	13,250.00	AUSTIN H...	
	45-0131	ASSY: AUSPEX HARNESS		0.00	500.00	26.50	13,250.00	AUSTIN H...	

\$ 62,301.50

Demand Vendor ☒ Browse Vendors Supply

Drag a column header here to group by that column

Enter text to search... Find

Vendor No	Vendor Name
→ 002000	ACME POWDER COATING & PAINT
ACME	ACME TRIPLE AAA PLATING
ALLPAC	ALL PACKAGING
000230	AUSTIN HARDWARE
BAKERY	BAKE IT LIKE MOM
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000300	COATING CO.
CURALL	CURE ALL PAINTING
000100	DEALERS CARBON INC

Drag a column header here to group by that column

Cost column is editable, and these three columns are connected via formula

$[Required] * [Cost] = [Extension]$

### **Rules for Coloring of Rows**

- Script brings in a new column called "FLAG\_CLOSED", which is read from the core JOB\_OPERATIONS table. Value can be Y, N, blank, or null, so there is an expression column, NewFLAG\_CLOSED, that gets rid of the null condition (since GAB can't recognize that)
- Coloring gets set as either, yellow, green, or white i.e. no color according to the following rules
  - I am first seeing if the FLAG\_CLOSED value (from the core table) is 'Y', and if so stops there and colors it green (this way it takes precedence over yellow). Then it moves on to try and make it yellow by comparing if qty required >= (greater than or equal to) qty issued. If that's not true, then again it reads the FLAG\_CLOSED value and if it's 'N', colors it yellow. Finally, if none of those apply i.e. qty issued > qty required and no value exists in the FLAG\_CLOSED column, then the row gets no color.

## Non-Exhaustive list of subroutine changes for Programmers:

- Load\_Purchase\_To\_Jobs
  - Add Flag Closed column
  - Removed call to load cost
  - POs column is POLineNum
  - Now removed previous work, and removed merge, using job header and job operations instead.
    - Removed QTY\_Committed per customer request, grabbing due date from Job\_Operations
  - Add Flag closed column from Job\_Operations
- FillPOData
  - Added analog entries from V\_JOB\_DETAIL and merged with original datatable
  - Add additional distinct datatable and filter to create dataview in loop. Fixes issue with duplicated PO numbers in column
  - Remove merge, and only do join on PO\_LINES and JOB\_HEADER
- LoadgvPJ
  - Add invisible formatting to Flag\_Closed column
  - Add conditional row formatting for any closed sequences
  - Remove previous work
- LoadPJCost
  - Had it commented out
    - Mod loop to go over what is in dataview created from what the user has filtered to show
    - Add line at the end of loop to set the extension after cost is set
- cmdLoadCost\_click
  - Check which tab is active, call appropriate sub for P2S or P2J
- PJ\_MenuClickNewAuto
  - Move select button workaround to outside if statement, this makes it so code isn't repeated when reading which PO creation option is selected
  - Add logic to create V.local.sSelect variable excluding those lines selected that are marked as closed
    - Tell user about how many records will not be made into POs (will come up with either individual or grouped by vendor POs)
    - Uncheck those lines that are closed during the looping
  - Mod previous error message. Used to give ordinals of PO records attempted, instead just list how many there were with partial info written (WO comments and descriptions)
  - After PO created for individual option and desc and wo comment updated/written, refresh grid by calling cmdPJRefreshClick
  - Switch away from using callwrapper 175100 for the individual option
    - Use Purchasing,PurchaseOrderUpload callwrapper
    - Call PJ\_GenerateGroupedPOs subroutine
      - Ensure to run it each time it loops and that it only contains one line (the one selected by user)
      - Increment PO number
- PJ\_MenuClickCreateAutoPOs
  - This sub uses a dataview with to get selected lines, with a non-blank vendor field
    - Added to filter to exclude those that are closed

- Purchasing.PurchaseOrderUpload
  - Callwrapper must have undergone a change in available modes. Used to be 0, now changed it to "append" (works in customer, not in mine...)
- GsGCVendQte\_RowCellClick
  - When setting value vendor quote gird, sets it to all matching parts because the setvalue line has row index set to "-1" should it just be the line user selected?
- Preflight
  - Added global variable for gvOSV
- Serialize
  - Added gvOSV and GSGCOSV as elements to serialize