WIP Set Up Guidelines

The following matrix is designed to provide a quick hit on what areas to access when setting up a feature or function for WIP. For more detail on how to do the specific set up, see the WIP Set Up chapter.

Feature/Function	Tools > Options	WIP Setup (Product)	Process/Operation	Other
BOMs	WIP > BOM Look Ups	None	Enable Consume Step – Choose BOM LookUp or BOM	Create BOMs in Inventory
Holds	WIP > Hold Reasons, WIP > Hold Release Codes	None	1. Set up Future Hold at Process 2. Set up Hold via Conditions Step 3. Set ability to Hold on Operation Revision screen	1. Create Variable Groups in Settings 2. Set up Attributes for Work Order or Product if enabling Conditions
Inspection	WIP > Inspection Positions, Inventory > Scrap Groups/ Codes	Associate Scrap Group to Product	1. Enable Inspection Step 2. Associate identical Scrap Group to Operation	None
Auto Batch# Rules	WIP to set up rules	Set Defaults	None	None
Auto Serial# Rules	WIP to set up rules	Set Defaults	None	None
Conversion	None	Associate resulting Products to Initial Product	Enable Convert Step	Create Initial and Conversion Products in Inventory
Operation Categories	WIP to set up Categories	None	Select Category at Operation	None
Attributes: Operations	WIP > Operation Attributes	None	Entry of values on Attributes tab at Operation Revision screen	Create Variable Groups in Settings
Attributes: Processes	WIP > Process Attributes	None	Entry of values on Attributes tab at Process Revision screen	Create Variable Groups in Settings

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Feature/Function	Tools > Options	WIP Setup (Product)	Process/Operation	Other
Attributes: Work Order	None	None	1. Attribute Setup on Process Revision screen 2. Set Attribute on Step screen 3. Auto Set Attribute on Step Screen 4. Conditions on Step Screen 5. Message Type: Work Order Attribute on Step Screen	Create Variable Groups in Settings
Attributes: Products	Inventory > Attributes (All Items); Inventory > Categories/ SubCategories > Attribute Setup	None	1. Message Type: Product Attribute on Step Screen 2. Conditions on Step Screen	1. Create Variable Groups in Settings 2. Attribute Setup on Inventory Item Detail Screen
Recipes	WIP > Recipe Look Ups		1. Enable Assets on Step Screen 2. Select Use Recipes; choose Operator Selectable or Look Up 3. Add Recipes/ Look Ups on Tools tab	Create Recipes in WIP > Recipes
Tools	WIP > Tool Look Ups	None	1. Enable Assets on Step Screen 2. Select Use Tools; choose Operator Selectable or Look Up 3. Add Tools/ Look Ups on Tools tab	Create Tools as Assets in Asset Mgt
Scrap	WIP > Scrap Locales, Inventory > Scrap Groups/ Codes	Associate Scrap Group to Product	1. Set ability to Scrap on Operation Revision screen 2. Associate identical Scrap Group to Operation	Set up Locales in Settings
Splits	WIP > Split Types	None	Set ability to Split on Operation Revision screen	None
WIP Types	WIP > WIP Types	None	Set default WIP Type at Process	None

Feature/Function	Tools > Options	WIP Setup (Product)	Process/Operation	Other
Work Order Categories/ SubCategories	WIP > Work Order Categories/ SubCategories	None	Set default Work Order Category/ SubCategory at Process	None
Close Codes	WIP > Close Codes	None	None	None
Release Quantity	None	Set default Release Quantity, Set "Can Adjust" and "Strict Adjust"	None	None
Associate Product with WIP Process	None	Associate and set default Process on WIP Processes link	Associate and set default Process on Products link	None
Permissions	None	None	Permissions link on Steps, Operation and Process screens to restrict what Steps and Work Orders Users can work on	Permissions link on Inventory Item detail screen to restrict selection of Product to WIP Work Order
Documents	None	None	Can be attached to Step, Operation and/or Process and accessible in Work Order accordingly	Can be attached to Inventory Item, but not accessible in WIP

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