

SQLWorks

Title of document	How to set up engineering docs for Work Orders
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Purpose

This procedure explains the settings and preferences that need to be set so that engineering documents will be automatically attached to work orders and be available to print alongside work sheets.

Engineering documents can be saved in 2 places; in the 'Documents' section on the parent stock item and/or the 'CRM' tab of the customer order. Any works order created for this item, where a document has been saved against it with the 'Engineering' tag, will be automatically available to print alongside the works order.

Scope

This procedure applies to any users that need to create Works Orders, print or use engineering documents within your company.

Table of Contents

Settings requirements.....	3
Accounts Prefs.....	4
Where to save Engineering Documents:.....	5
Option 1 - Stock item in Stock Ledger.....	5
Option 2 - Customer order in Sales Ledger	6
Default Engineering notes.....	8
WO Notes and Schedule notes tab on Work Order	9

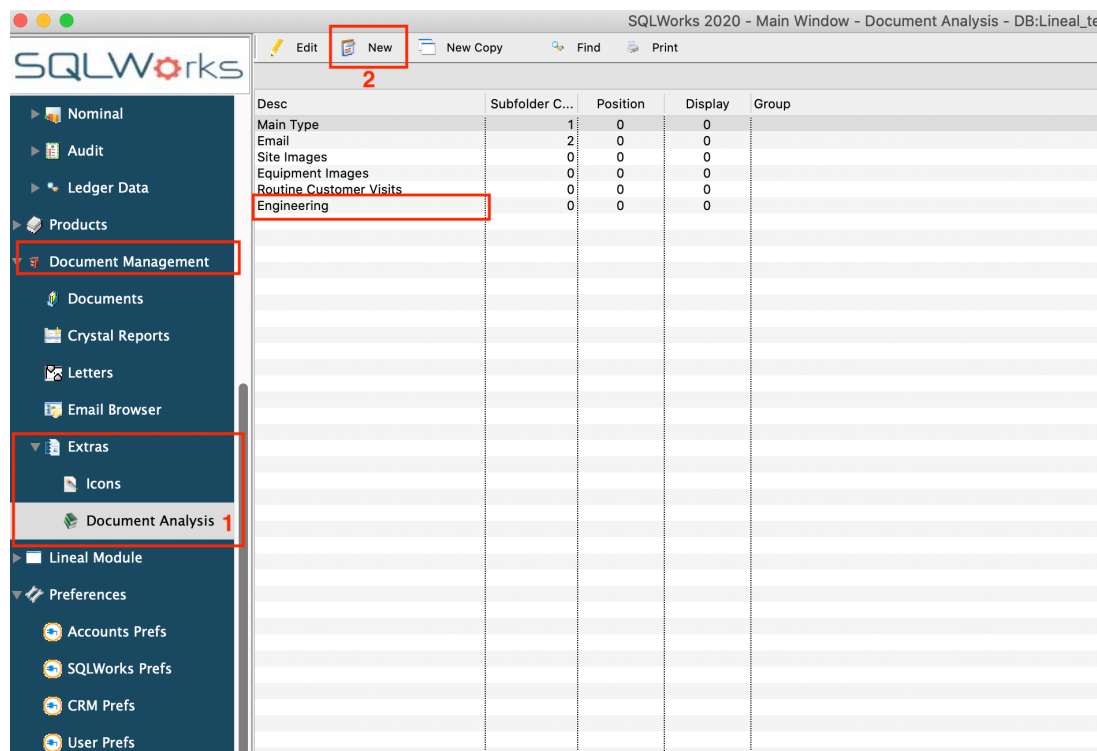
Change History:

Date	Version	Created by	Description of change	Approved by
26.07.2020	1	Naomi Williams		
07.12.2020	2	Naomi Williams	Added option to add engineering docs to Sales Order in SL	

Settings requirements

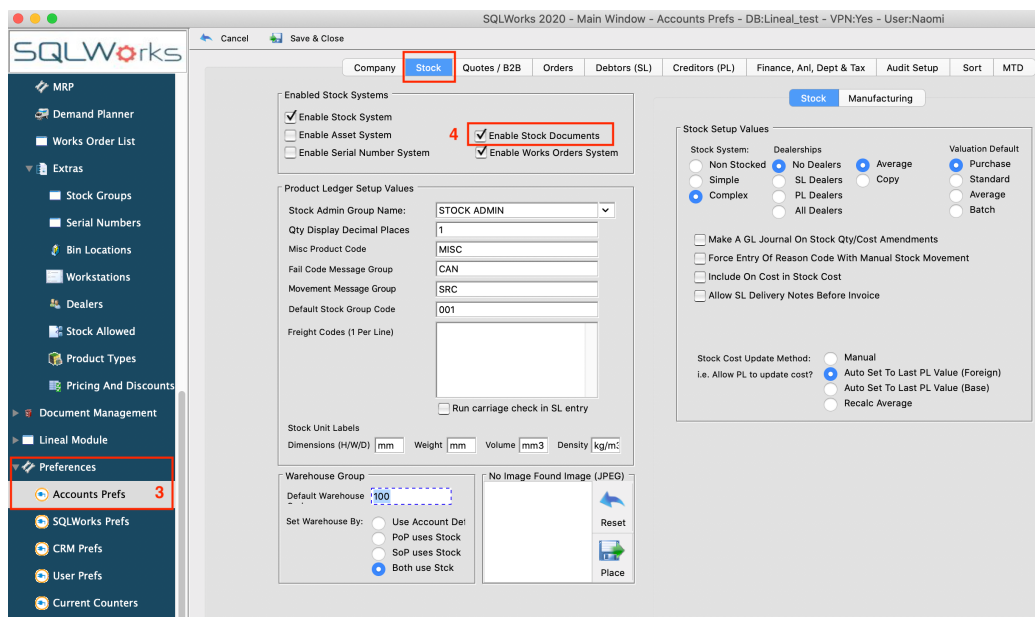
The process of creating Work orders is normally to produce a work sheet that can be given to staff on the shop floor to make a parent component.

In specific instances this work sheet may need to be accompanied with additional instructions, or engineering documents to help make that item. SQLWorks can have preferences set so that 'Engineering' type documents saved to a stock item in the Stock Ledger, will automatically appear on subsequent Work orders for this parent component item, and be available to print alongside the work sheet.

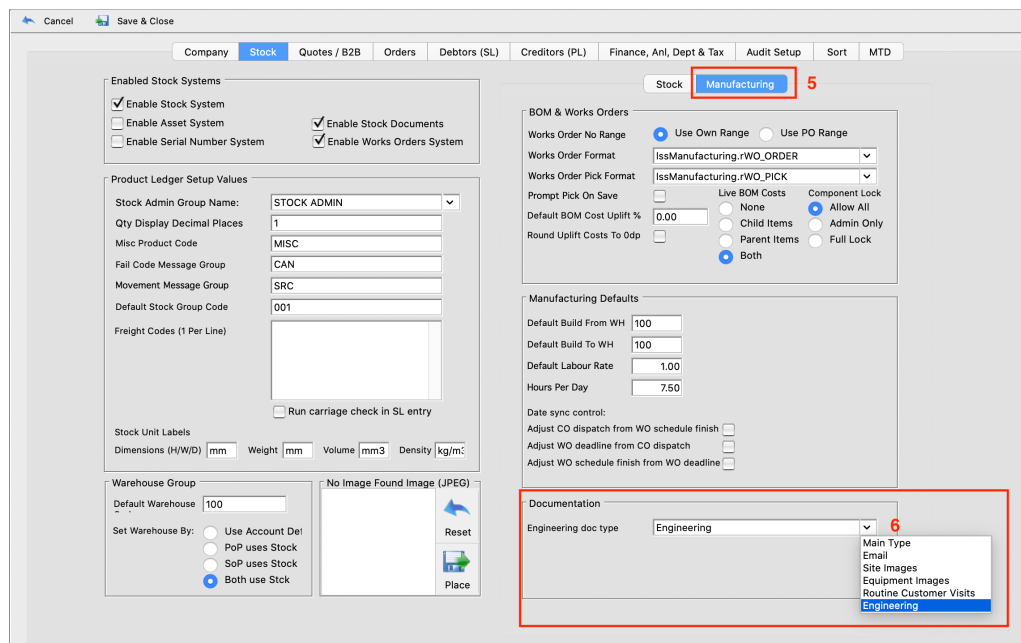


1. To set these preferences firstly need to navigate to the 'Documents Analysis' module which can be found in the navigation bar Via the 'Extras' section under 'Document Management'.
2. In the table on the right there should be an Engineering option in the list, if this does not show here, you can click on New and add this description. This will be needed when you set the required Accounts Prefs.

Accounts Prefs



3. 'Accounts Prefs' can be found in the Navigation bar Via 'Preferences'.
4. Open the 'Stock' tab and ensure that the tick box next to 'Enable Stock Documents' is checked.

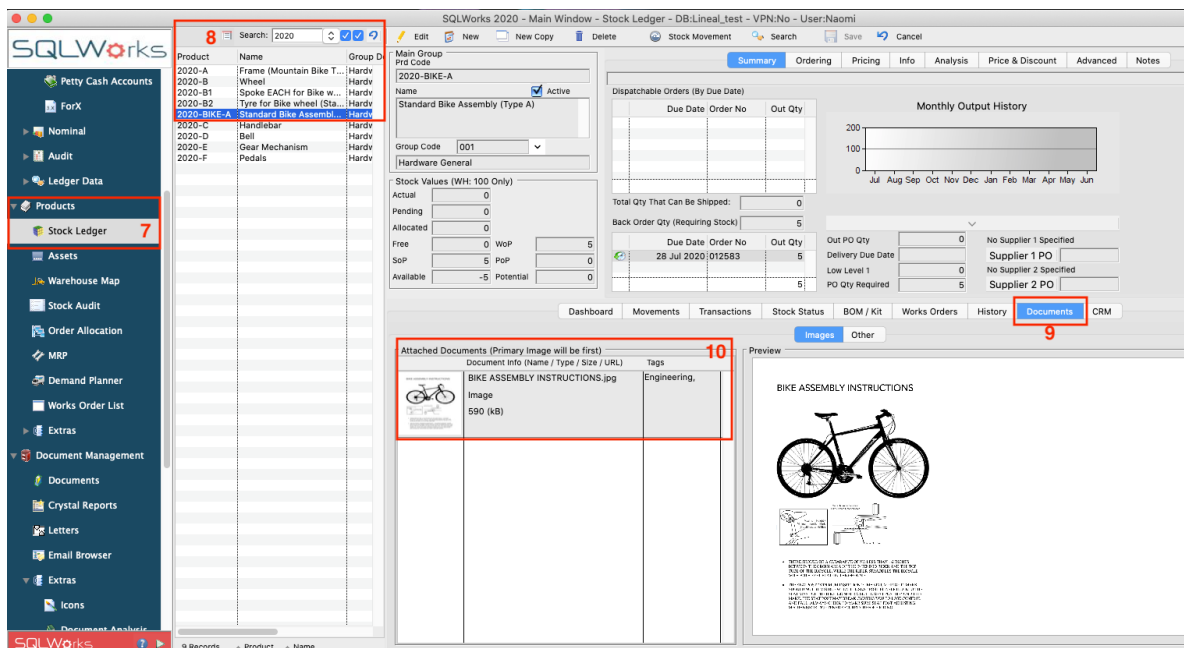


5. In the same Window click on the 'Manufacturing' tab on the right.
6. At the bottom of this window you will see a Documentation section for Engineering doc types, from this dropdown menu select 'Engineering'.

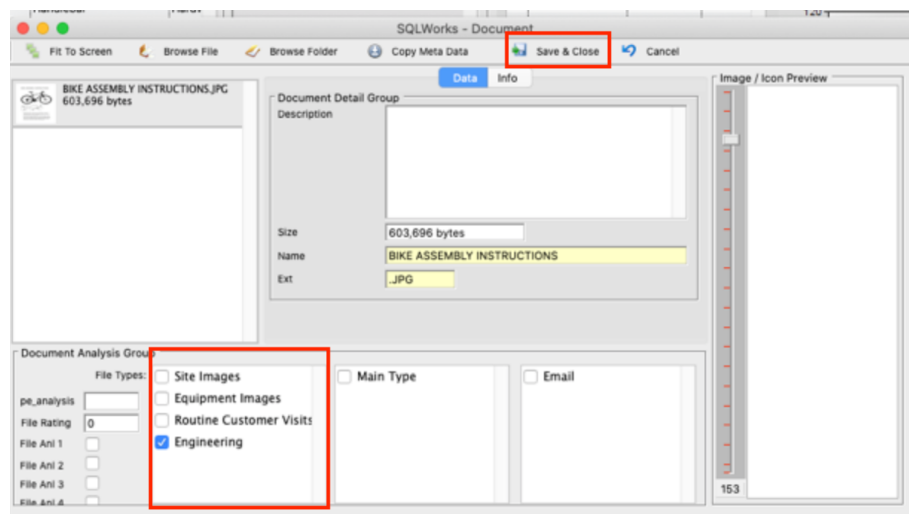
The preferences have now been set so that the 'Documents' tab will now appear as an option on the stock item in the Stock Ledger, to which Engineering documents you wish to be available at the point you print the Work Order sheet can be saved.

Where to save Engineering Documents:

Option 1 - Stock item in Stock Ledger

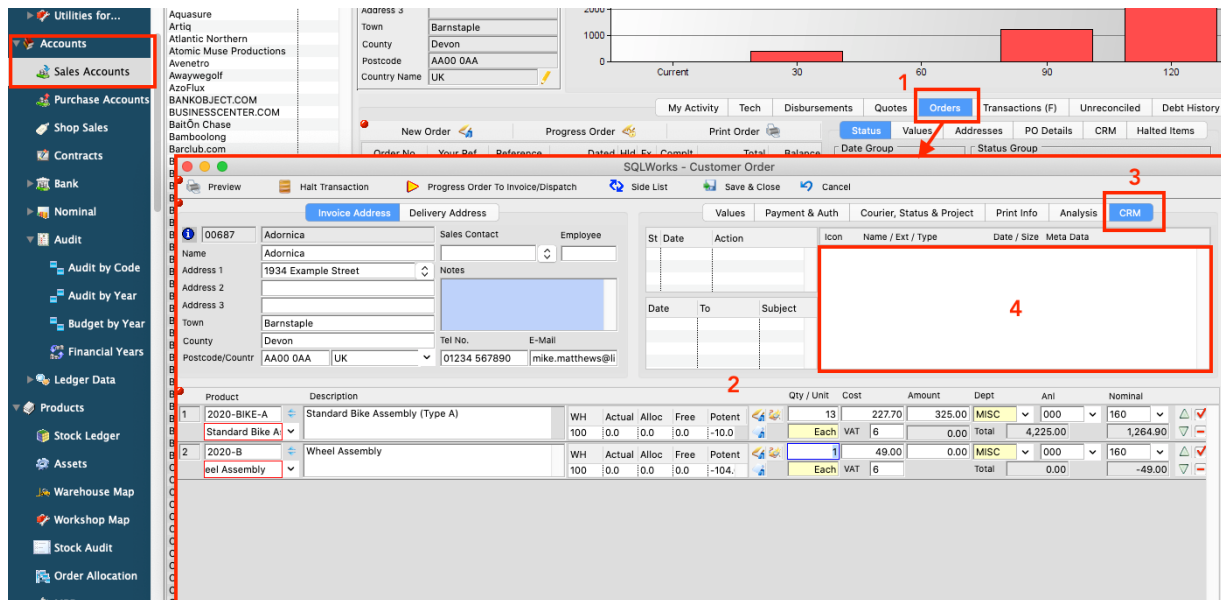


7. Go to the 'Stock Ledger' which can be found in the Navigation Bar via 'Products'.
8. Enter the Product code for the parent component item in the Search field and select the item you would like to save the Engineering document against.
9. There is now a 'Documents' tab in the lower section, select this tab.
10. Documents can be added here by simply dragging and dropping. If the 'Images' tab is selected only image files can be saved here. If the 'Other' tab is selected any type of document can be saved; such as .pdf, if it is a .jpeg or .png file these will automatically be stored on the 'Images' tab.
11. When saving the document, the following pop up box will appear; ensure the box is ticked next to 'Engineering' and then click Save & Close.

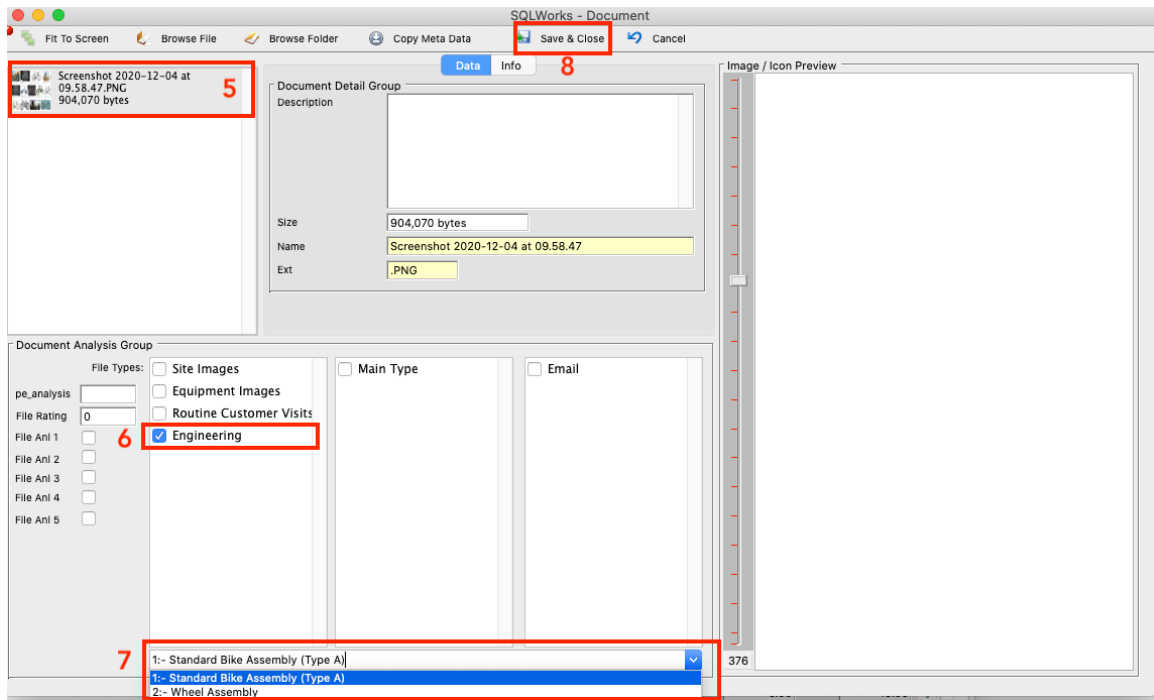


Option 2 - Customer order in Sales Ledger

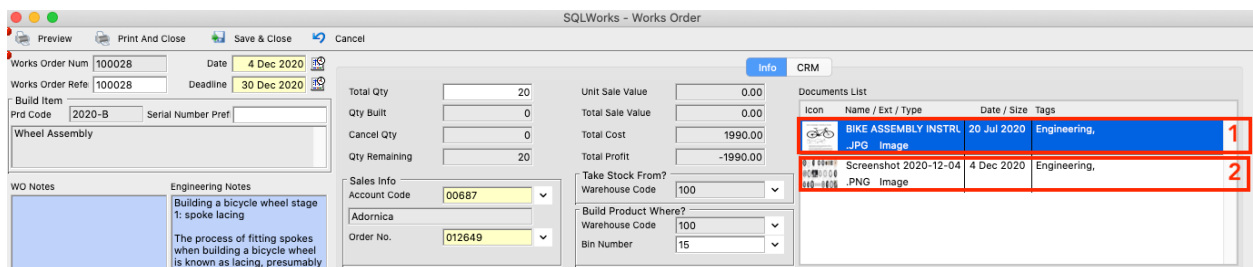
You can also add engineering documents to a customer order. The Sales Ledger aka 'Sales Accounts' can be found under the 'Accounts' master menu on the Nav bar.



1. To create a new order, you select the 'Orders' tab and either right click and select new order from the drop-down menu, or click the new order button, this will open your customer order window.
2. Here you add the line items to your order. You can add multiple lines to your customer order, and if the product requires a WO to be completed the engineering documents added at this stage will be carried through to the WO.
3. To add engineering documents, click and open the CRM tab.
4. Simply drag and drop the document into this box, any documents added here will remain attached to the order should you need to view it later. You will receive the following pop-up box where you will need to apply the 'Engineering' tag.



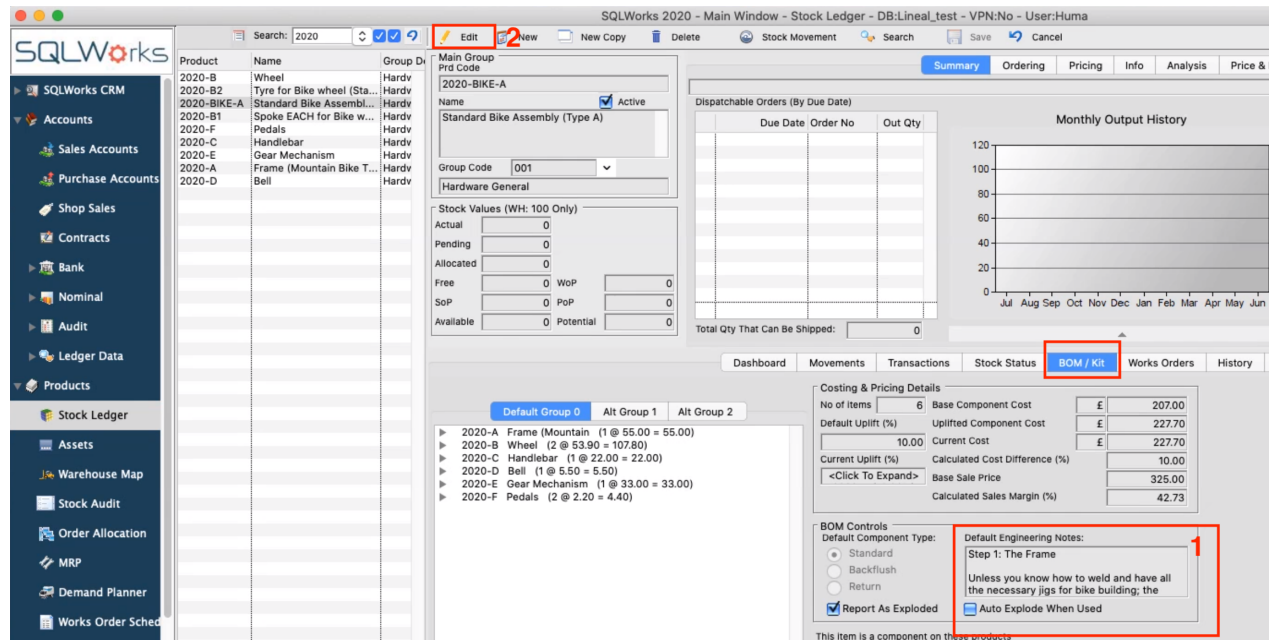
5. The document added to the order can be seen here on the left.
6. To ensure the document appears on the work order for this item, tag the document with 'Engineering' by ticking the check box.
7. The drop box at the bottom allows you to select the order line that the document refers to. You may have multiple order lines per order, as well as multiple documents for order line item.
8. To finish the process of linking the document to the sales order, click 'Save & Close' at the top.
9. When you open the work order that has been created for the item, any documents saved to either:
 1. the stock item in the 'Documents' tab, or
 2. the sales order item in the CRM tab, will show in the Documents List in the top right, and you will be prompted to print alongside your work order.



Works orders are created during the MRP run process, or via a right click option on the item to be built, in the lower table of the Sales order and selecting 'Send to Works Order'.

Default Engineering notes

SQLWorks has not just got a section for documents for Work Orders but also a 'Default Engineering Notes' section, where assembly notes can be added within the 'BOM Controls' on a parent stock item that will appear on the Work Order when printed.



1. Any notes written here, will show at the top left of the Work Order Schedule by Default when an Active Work Order is created.

2. To add text to this section select Edit at the top. This text box is collapsible, so will open a larger window when editing.

This text will appear in the Work Order window in the top left section and on the printed Work Order underneath the product list.

WO Notes and Schedule notes tab on Work Order

When you open a Work Order there are a number of sections where you can add additional notes for your production team.

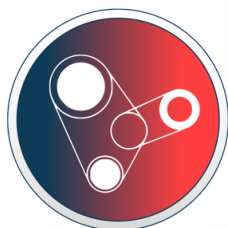
As well as the Engineering Notes section which is set by default to any WO for that item, there are a couple of other Notes sections for each WO specifically.

The screenshot displays the 'SQLWorks - Works Order' window. It features a top menu bar with 'Preview', 'Print And Close', 'Save & Close', and 'Cancel'. Below this, there are input fields for 'Works Order Num' (010073), 'Order Date' (5 Aug 2020), 'Works Order Refe' (010073), and 'Deadline'. A 'Build Item' section shows 'Prd Code' (2020-B) and 'Serial Number Pref'. To the right, there are fields for 'Total Qty' (10), 'Qty Built' (0), 'Cancel Qty' (0), and 'Qty Remaining' (10). Further right, there are 'Unit Sale Value' (0.00), 'Total Sale Value' (0.00), 'Total Cost' (995.00), and 'Total Profit' (-995.00). A 'Documents List' table is also present. The 'WO Notes' section is highlighted with a red box and a red '1', showing a note about building a bicycle wheel stage 1: spoke lacing. The 'Engineering Notes' section is also visible. The 'Schedule Notes' tab is highlighted with a red box and a red '2'. The 'Schedule Plan' section shows 'Reference' (Schedule 1), 'Total Qty' (10), 'Build Qty' (10), 'Remaining Qty' (10), 'Start Date' (5 Aug 2020), 'Min Hours / Days' (55.00 / 7.33), 'Finish Date' (12 Aug 2020), and 'Scheduled Days' (8.00).

1. WO note section for the whole WO, these notes will appear at the very top of the printed Works Order.
2. If required there is a Schedule Notes tab on the Work Order itself where additional notes can be added.

These Notes may be specific to this particular order so these notes will appear for this Work Order only, at the top of the printout.

For more information on Works orders see our Introduction to Works order guide on our website <https://www.sqlworks.co.uk/brochures/Introduction-to-Works-orders.pdf>. There are a number of other guides on our Help page <https://www.sqlworks.co.uk/help/> which you may find useful.



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