

Work Instruction: Creating an Engineering Job

1. Audience

Engineering Department

2. Objective:

Creating a job from a Sales Order for the Engineering Department

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	5/31/2018	Original issue.	Wagner
001	09/30/2019	Updated sticker graphic.	Wagner
002	6/1/2022	Update for V9 and new processes.	Wagner
003	5/10/2023	Added note to Step 5	Rigotti

4. Scope

The job is created to keep engineering aware of its workload and to track progress of jobs.

5. Prerequisites

M1

6. Records

- Job Record (Electronic)

7. Associated Documents

- Engineering Job Status Report
- Elec Engineering Job Status Report
- Engineering Operations

8. Evaluative Factors

- Power BI Reports for On Time measurements

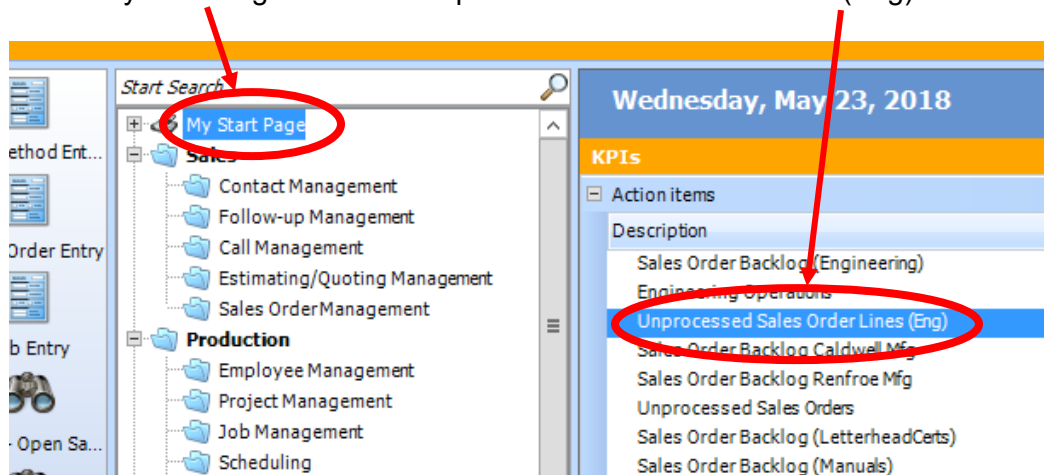
9. Responsibility

Engineering Scheduler

10. Instructions

Step 1

Go to "My Start Page" and the "Unprocessed Sales Order Lines (Eng)" KPI.



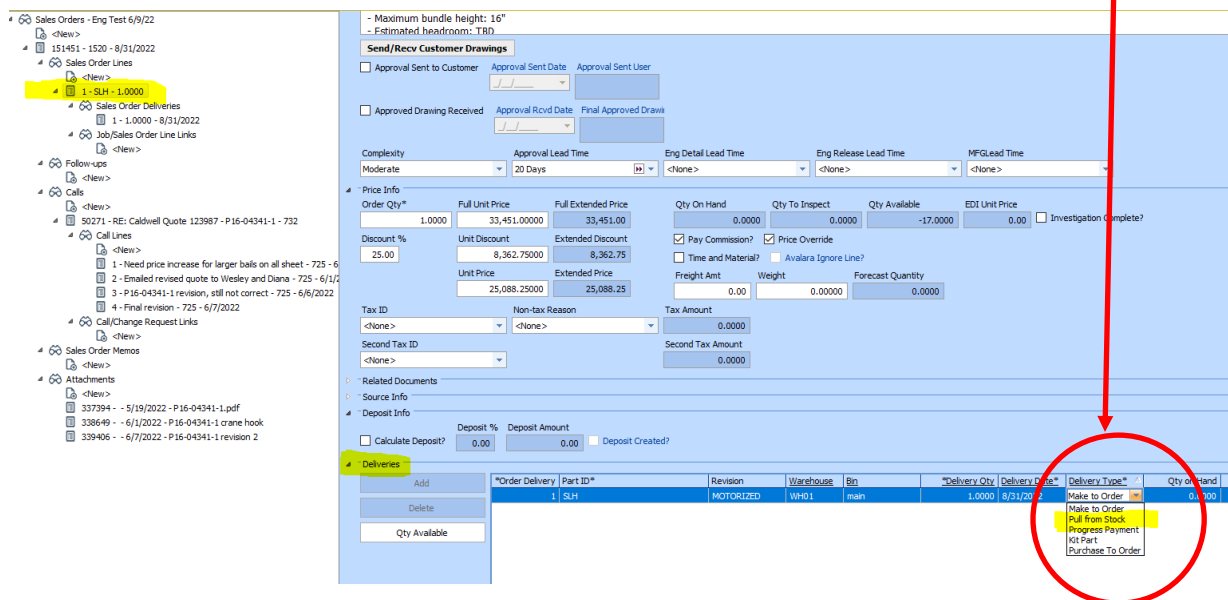
Step 2

Choose an order from the list. E-mail the designer you are going to assign the job to and ask them to review the order and suggest estimated hours to schedule for approvals. Once the designer responds, double click on the order you wish to open.

151431	6/7/2022 2:05:55 PM	7/6/2022	2	PT	Proof Testing	Prc
151451	6/7/2022 3:26:48 PM	8/31/2022	1	SLH	60MS-10-72, Heavy Duty Sheet Li...	- C
151469	6/8/2022 6:50:34 AM	8/18/2022	1	SLS	Model 62, Small Bundle Sheet Lifter	- C

Step 3

Change the "Delivery Type*" on the Sales Order Line you are going to schedule to "Pull from Stock".



Step 4

To create the job, click on “New” under Job/Sales Order Line Links under the Sales Order Line you wish to schedule.

The screenshot shows a software interface with a left-hand navigation pane and a right-hand data entry pane. In the left pane, under 'Sales Orders - Eng Test 6/9/22', the 'Job/Sales Order Line Links' section is highlighted with a red circle. A red arrow points from the text 'To create the job, click on “New” under Job/Sales Order Line Links under the Sales Order Line you wish to schedule.' to the '<New>' button within this section. The right pane shows fields for 'ID Info' (Order ID: 151451, Order Line: 1), 'Part Info' (Part ID: SLH, Part Description: 60MS-10-72, Heavy Duty Sheet Lifter), and a 'Long Description' with details like capacity and dimensions. There is also a 'Send/Recv Customer Drawings' button and an 'Approval Sent to Customer' checkbox.

Step 5

Uncheck “Pull part method into job” and click on the “Save Link and Create Job” button.

The screenshot shows the 'Create Job Info' section of the software interface. The 'Pull part method into job?' checkbox is unchecked and highlighted with a red circle. Below it, the 'Part to pull' is set to 'SLH'. The 'Save Link and Create Job' button is also highlighted with a red circle. The left navigation pane shows the 'Job/Sales Order Line Links' section expanded, with '1 -' selected. The right pane shows fields for 'Link Info' (Order Delivery: 0, Link Type: Direct Link), 'Create Job Info' (Job ID: 151451-01-01, Part ID: SLH, Production Qty: 1.0000, Prod Due Date: 8/31/2022), and 'Job Header Info'.

The screenshot shows a 'Confirm' dialog box with a yellow warning triangle icon. The text inside reads: 'You are attempting to create a direct link to a sales order line that has no make to order deliveries. Do you want to continue?'. There are 'Yes' and 'No' buttons at the bottom. A red arrow points from the text 'Click “YES” in the Confirm box that pops up .' to the 'Yes' button.

Click “YES” in the Confirm box that pops up .

Step 6

- Click on the job you just created.
- Move the "Order Qty" to "Inventory Qty". The "Order Qty" should now be "0". Make sure the "Inventory Qty" matches what the "Order Qty" was originally.

The image contains two screenshots of a software interface. The left screenshot shows a tree view on the left with a job selected, and a main window on the right. The right screenshot shows the same main window with the 'Order Qty' field circled in red, and the 'Inventory Qty' field also circled in red. The 'Order Qty' field has a value of 1.0000, and the 'Inventory Qty' field has a value of 0.0000. The 'Scrap Qty' field has a value of 0.0000, and the 'Rework Qty' field has a value of 0.0000. The 'Prod Due Date' is 8/31/2022.

Job Details:

- Complexity: Moderate
- Approval Lead Time: 20 Days
- Eng Detail Lead Time: <None>

Job Functions:

- Get Part Method
- Get Job Method
- Save Method
- Move Top Level Assemblies to Materials
- Configure Part

Planning/Progress Info:

- Engineering Review
- Approval Drawing Rcvd
- Engineering Final Review Complete
- Eng Pre Orders Complete

Order Qty: 1.0000
Inventory Qty: 0.0000
Scrap Qty: 0.0000
Rework Qty: 0.0000
Prod Due Date: 8/31/2022

Step 7

Each job that requires a special manual will need a sales order line added for the manual. See WI-20-25, Managing Instruction Manuals for Engineered Jobs.

Step 8

- If a new job requires approvals, reference WI-20-041, Assigning Designer and Setting Approval Date.
- If a new job does not require approvals, reference WI-20-011, Assigning Designer and Release Due Date.