

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

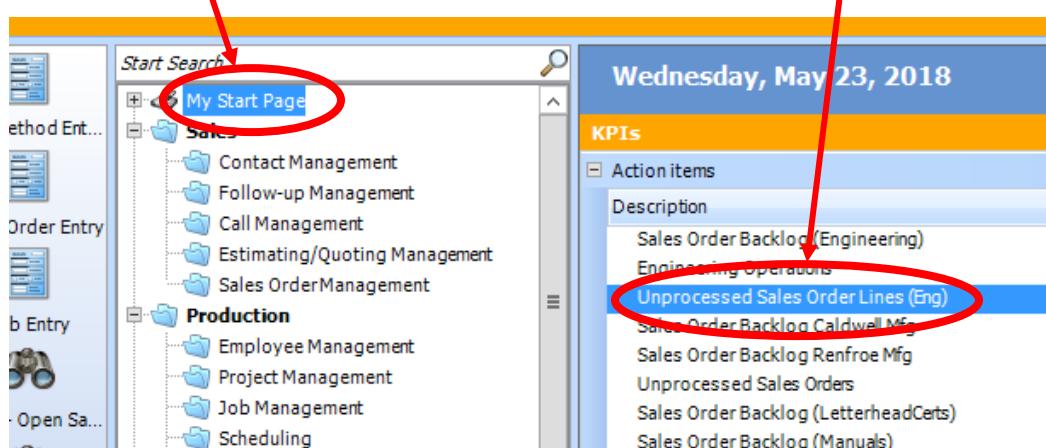
9. Responsibility

Engineering Scheduler

10. Instructions

Step 1

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



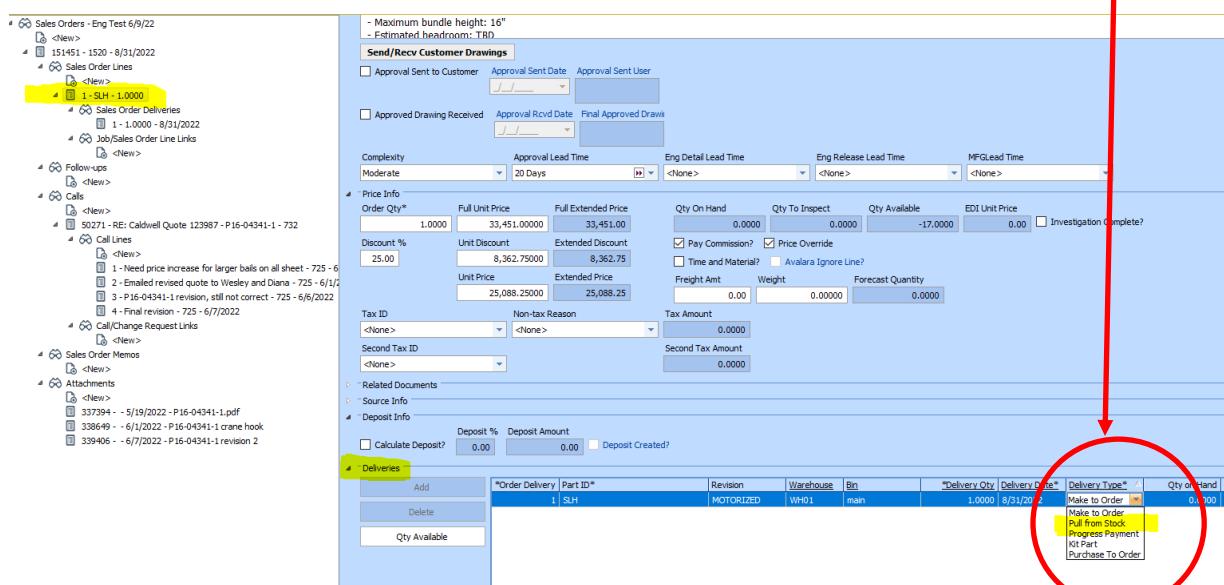
Step 2

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	Pr...
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

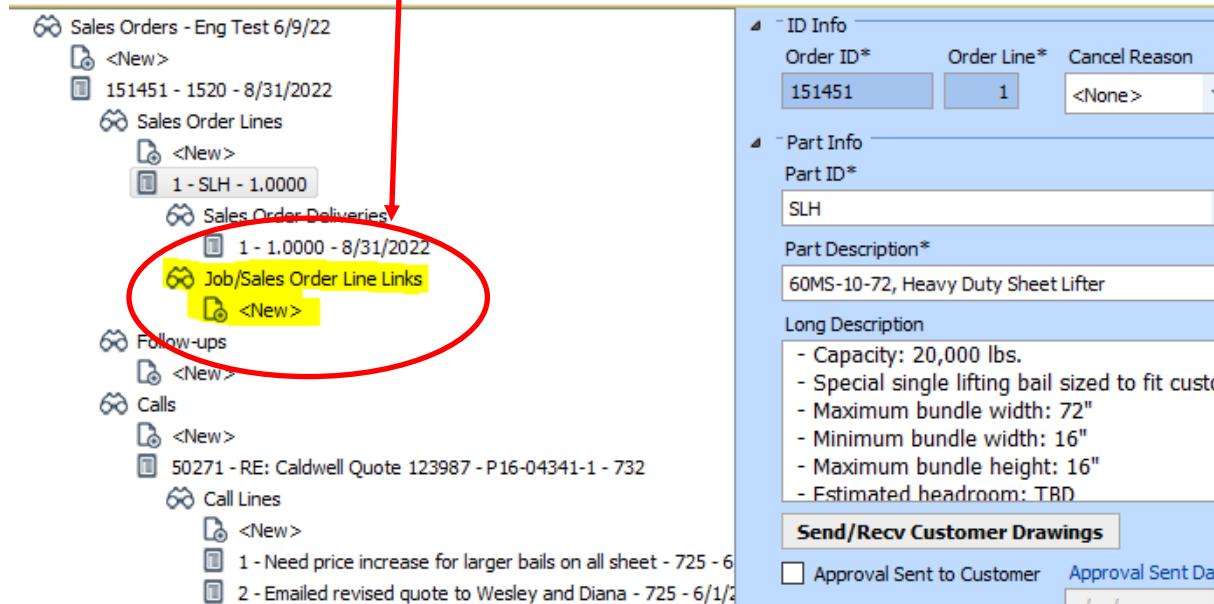
Step 3

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



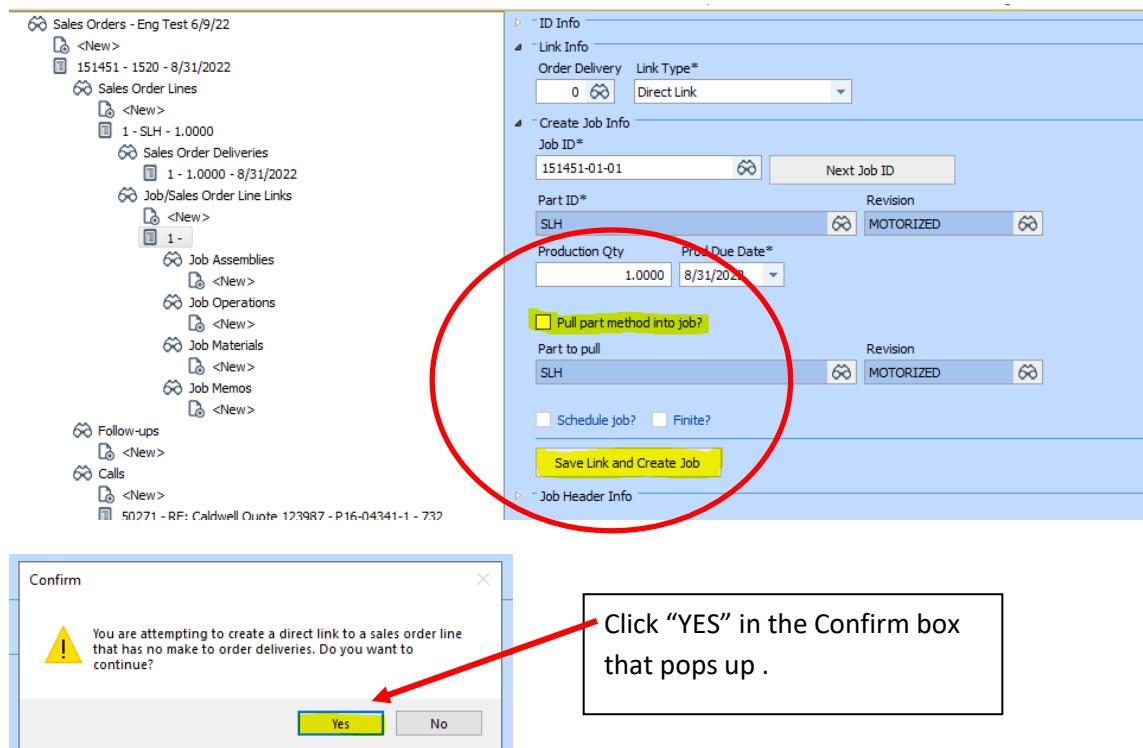
Step 4

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



Step 5

Uncheck “Pull part method into job” and click on the “Save Link and Create Job” 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 screenshot shows two views of the Job Details screen for job 151451-01-01. The left view shows the initial state with Order Qty at 1.0000 and Inventory Qty at 0.0000. The right view shows the state after Step 6, where Order Qty is now 0.0000 and Inventory Qty is 1.0000. A red oval highlights the 'Order Qty' and 'Inventory Qty' fields in both views.

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.