8.4.0

Relates to version
Tags: 8.4

Dispatch Orders

Enhancements in **Dispatch Orders** screen in 8.4:

- **Re-open Cancelled Orders**: You can now re-open dispatch orders that were previously cancelled.
- **Improved Search Functionality**: The search function now allows you to filter results by selecting specific statuses.

Numeric Values Formatted Based on Localisation Settings

Localisation settings affect each user's experience when they are working with numbers. For example, in UK, one thousand five hundred point 5 looks like 1,500.5 but in France the same number looks like 1.500,5.

Localisation settings come from the user account language setting.

When displaying numbers larger than 999, the format displayed is defined by localisation settings.

The remaining text in this section covers the use of the screen designer tool – most customers will not use this tool.

This is for awareness for advanced users only.

In 8.4, if the format isn't defined for a numeric column in the designer, then the publisher defaults to {0:#,#.#####}, which means "use culture-specific number format with flexible precision up to 5 decimal places", which for en-GB is 123,456.78123.

Default: {0:#,#.#####}

| No format	en-GB	lt-LT	fr-FR
1	1	1	1
123456789	123,456,789	123.456.789	123.456.789
1000.5	1,000.5	1 000,5	1.000,5
1000000000.5556668	1,000,000,000.55567	1 000 000 000,55567	1.000.000.000,55567
-0.001	-0.001	-0,001	-0,001

For DataType = Number:

1. If you leave the format blank, then at runtime the page will display raw numbers coming from the data source without any formatting or rounding.

2. Description of the meaning of available formats is included in the suggestions; in most cases the highlighted one should be suitable.
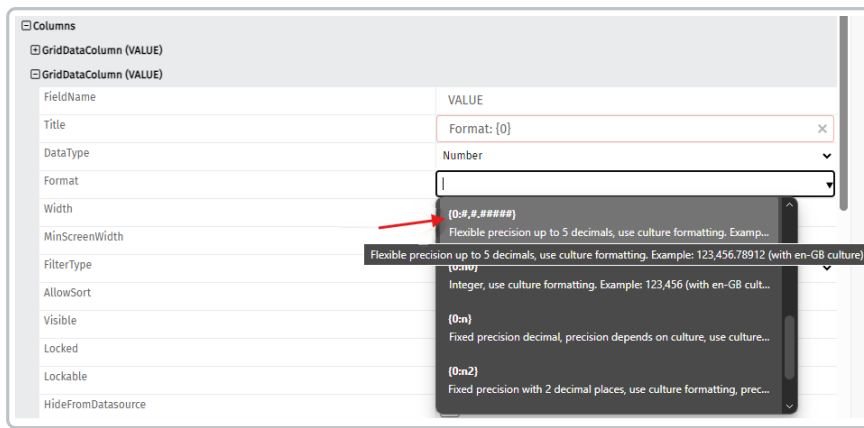
View Job Documents from Workstation Screen

Operators weren't able to view job documents from the workstation screen without first booking onto the job/item.

In 8.4, the **Documents** button will be displayed when you select a job with documentation attached without needing to book onto the job. Click the button to display the **Documents** screen. Here you can view any file/document attached to the job and its operations.
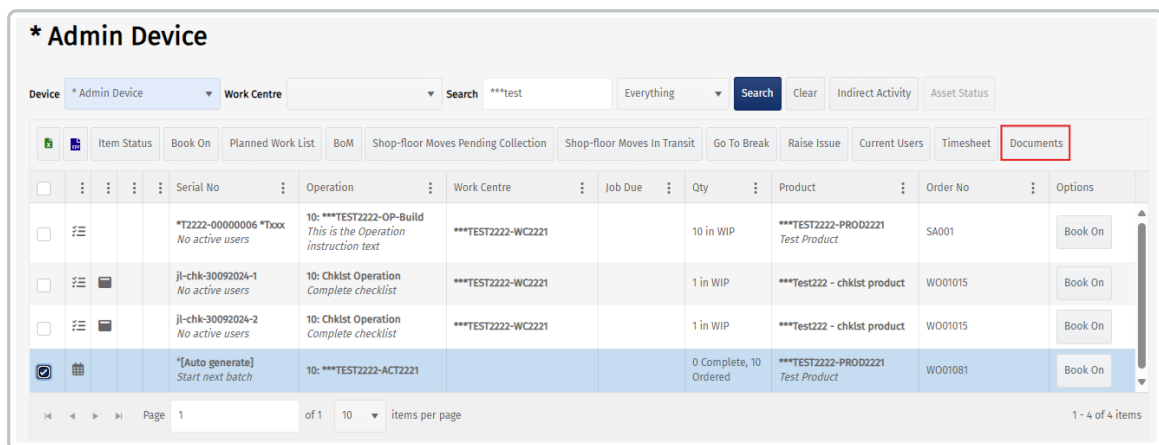
Public API

The **Document API** was extended in 8.4. The 'upsert' and 'list' functionalities were added, and URL uploads are now supported.

Document versioning can be managed via the API in 8.4.

	DocumentVersion	Show/Hide	List Operations	Expand Operations
POST	/api/DocumentVersion/List			List Document versions by filter
POST	/api/DocumentVersion/Upsert		Insert or Update Document Version. Requests should be sent as FormData	

The **Schedule API** now supports assigning documents from the Document Manager to scheduled jobs.

	Schedule	Show/Hide	List Operations	Expand Operations
PUT	/api/Schedule/Upsert			Insert or Update work order
PUT	/api/Schedule/AssignDocument			
	Assigns a document to a job. Major and Minor versions are optional. If major and minor are not set then it'll use the latest version. If major is specified and minor is not then it'll use lates minor for the spefified major version. If major and minor are specified then it'll use the specified version.			
POST	/api/Schedule/List			List work order by search filter
DELETE	/api/Schedule/Delete			Delete an existing work order

Recipe

The RecipeList API was enhanced to support filtering by the following parameters:
- recipe.suid
- workflow.name
- workflow.suid
- workflowversion.suid
- workflowversion.majorversion
- workflowversion.minorversion
- bom.name
- bom.suid
- bomversion.suid
- bomversion.majorversion
- Bomversion.minorversion

Workflow

As of 8.4 it is possible to copy a template workflow into a product via the Public API.

Sync Service

The New SQL To File Task screen allows you to configure an outbound data export task to retrieve data using a SQL statement and lets you save a file with a delimiter and extension in the specified, on-premises folder location. This enhancement means that this capability can now be achieved through configuring a single task without requiring customisation.

PDF Functionality in Custom File Viewer

Note that this functionality is only available for the Chrome browser in 8.4.

It used to be difficult for an action to access a specific piece of information contained in a PDF. For example, a single PDF may have contained several work instructions required by several workflow actions. Historically, the approach was to split the PDF into separate documents and to reference those. Each time the primary source, the PDF, was updated, the process needed to be repeated.

This was resolved in 8.4 where it is possible to configure a custom action to open a PDF on a specific page. This gets rid of the cumbersome tasks associated with splitting and maintaining several documents.
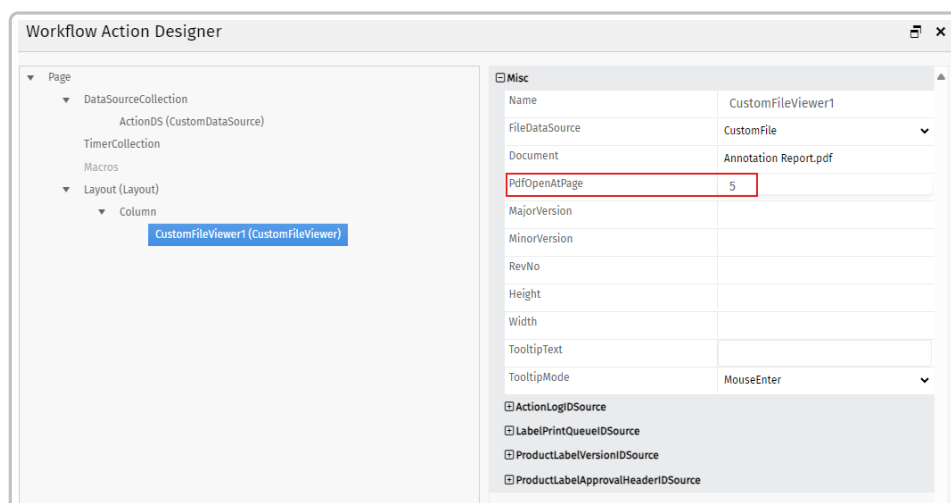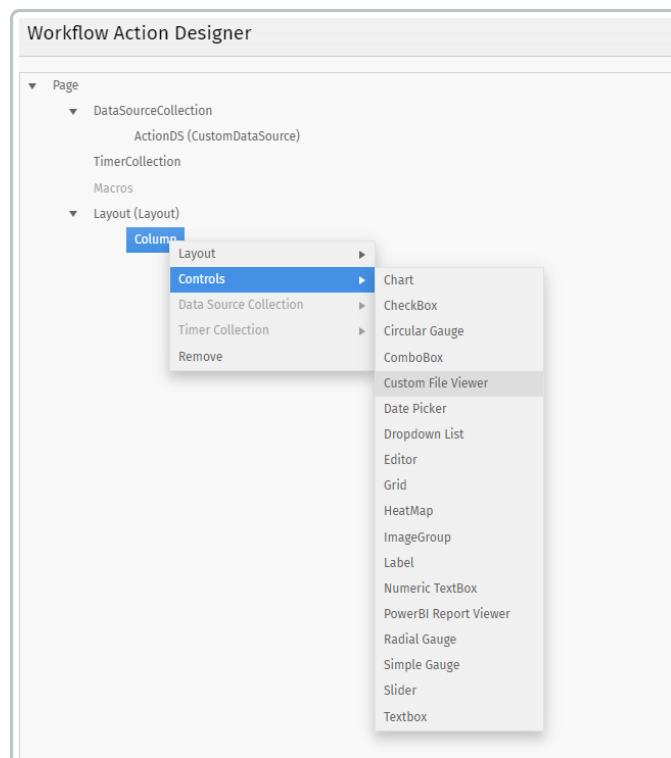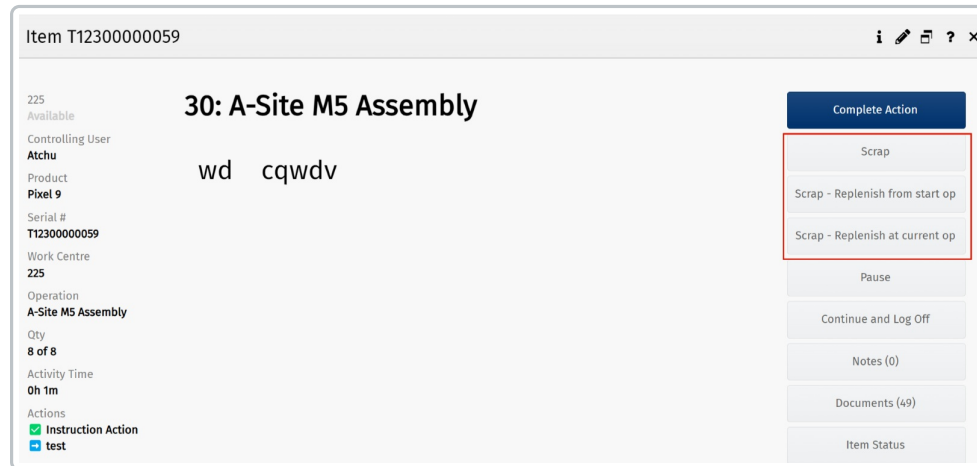

Append Options on Scrap

Typically, when a quantity of a manufactured batch is scrapped, the output from the process is reduced. For example, if an

operator is working on a batch of 10 and scraps 2, we expect to only complete 8. However, there are business cases where the works order quantity must be hit, therefore, you have to make up the quantity (i.e., append the quantity).

Historically, you could only manually perform an append or adjust transaction to make up a shortage when you scrapped a quantity, and this would always enter the workflow at the first operation.

In 8.4 users have more control over where in the workflow a new quantity can replace the scrapped quantity and if this should happen automatically.

The image shows the following options when booked onto an operation where scrap is allowed:

Scrap: The scrapped quantity will not be automatically replenished. You can manually append (if the workflow version and the operation scrap mode allow) which will start the appended quantity at the first operation in the workflow.

Scrap – Replenish from start op: A quantity equivalent to the scrapped quantity will automatically be appended and starts at the first operation in the workflow. For example, an operator is working on a batch of 10 (for example chairs), scraps 2, starts another 2 at the first operation to replace the 2 that were scrapped.

Scrap – Replenish at current op: A quantity equivalent to the scrapped quantity will automatically be adjusted at the current operation in the workflow. For example, an operator is working on a batch of 1000 (for example cakes), scraps 2 and then continues to make 1000 at the current operation. In this scenario, the WIP quantity (cake mix) for making 1000 is readily available at the operation where the scrap occurred.

Audit Trail for Deleted Entities

The recycle bin was extended in 8.4 so that it covers many more entities. You can now see all deleted items and the revision history of deleted items.

The recycle bin now covers everything with revision history tracking. Users can view deleted workflow nodes, actions, operation properties, skills, and document links, providing a comprehensive view of all deletions.

It also shows deleted items for things that were linked to the thing that was deleted. For example, deleting a workflow node would also delete its actions, operation properties, skills, document links, etc.

The screenshots show the levels accessible for entities from the recycle bin.

Recycle Bin

Record Type
[WORKFLOWNODE ✕]
[WORKFLOWACTION ✕]

From [01/09/2024 📅] **To** [24/01/2025 📅] **Name** [ ]

[Refresh]

[Revision History] [Recycle Bin For Linked Records]

Type	⋮	Deleted On	⋮	Deleted By	⋮	Name
WORKFLOWNODE		29/10/2024 09:10:21		Gopal Gaurav		Convert
WORKFLOWNODE		29/10/2024 09:30:37		Gopal Gaurav		Convert
WORKFLOWNODE		29/10/2024 11:56:13		Gopal Gaurav		Convert
WORKFLOWNODE		29/10/2024 09:05:52		Gopal Gaurav		Convert
WORKFLOWNODE		31/10/2024 12:22:02		Arturs Kupce		TEST1

History

Rev No	⋮	Activity	⋮	Name	⋮	Default Asse...	⋮	Op #	⋮	Work Centre Group	⋮	Last Edit User	⋮	Edit	⋮
3		Assy		Assy		Available		25		PC Work Centre		Arnav (Mestec Support)		09/10/2024 17:33	
2		Assy		Assy		Available		25		PC Work Centre		Arnav (Mestec Support)		09/10/2024 17:33	
1		Assy		Assy		Available		25		PC Work Centre		Arnav (Mestec Support)		09/10/2024 17:31	

Pegging Inventory for Dispatch by Sales Order Number

In the Dispatch Orders screen, the **Is Restricted By Sales Order Reference** field lets you choose if material for a sales order should be restricted to a specific job.

The setting has been added in 8.4 and only applies to material items that are created from works orders. It is to ensure that only material items created from works orders with a sales order reference matching the dispatch order line item's sales order reference, can be picked.

Options for the **Is Restricted By Sales Order Reference** field are:
- *Yes* and a sales order reference IS provided: It restricts your picking list to only material items from a works order with a matching sales reference.
- *Yes* and a sales order reference is NOT provided: It restricts your picking list to only material items from a works order with no sales order reference.
- *No*: It would operate as it has in the past where all material items would be available to be picked.

Purchase Order Receipt

Purchase Order receipt was enhanced in 8.4. Multiple items can now be received for the same serial number prefix in one receipt transaction. The serial number assigned will append "-x" for each item received.

For example, receiving 3 items against serial number prefix "xyz" in one transaction, the items would have the following serial numbers assigned: "xyz-1", "xyz-2" and "xyz-3".

Note that if you receive one item in a receipt transaction (regardless of the quantity of this item), this will not add any suffix.

Shift and Team Selection in the UI

The shift and team selection UI was enhanced to provide a better user experience. When you access the Select Shift screen, you are presented with a list of the teams you are assigned to with their associated shifts. Your selected team is always displayed at the top of the list of teams.

Tool Reporting

The following enhancements were made to tool reporting:

Improved Where Used

The **Where Used** screens include a **Product** column for *Tool Type, Tools* and *Tool Groups*, to enable the user to quickly find out where these are referenced in product workflows.

Tool Use Analysis page

The **Tool Use Analysis** page is a new feature that provides comprehensive data on tools and their usage. This page allows users to drill down into detailed information about tool utilization, giving insights into how often and in what capacity each tool is being used.

The analysis can help identify patterns, calibration cycles, inefficiencies, and areas for improvement, making it a valuable resource for optimizing tool management and operational efficiency.