

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
100000000.5556668	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.

GridDataColumn (VALUE)	
GridDataColumn (VALUE)	
FieldName	VALUE
Title	Format: {0}
DataType	Number
Format	1
Width	(0:#,#,#####)
MinScreenWidth	Flexible precision up to 5 decimals, use culture formatting. Examp
FilterType	Flexible precision up to 5 decimals, use culture formatting. Example: 123,456.78912 (with en-GB
AllowSort	Integer, use culture formatting. Example: 123,456 (with en-GB cult
Visible	{0:n}
Locked	Fixed precision decimal, precision depends on culture, use culture
Lockable	{0:n2}

### 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.

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#### **Public API**

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

Document	Show/Hide   List Operations   Expand Operations
рит /api/Document/Upsert	Insert or Update Document
Post /api/Document/List	List Documents by filter
POST /api/Document/Upload	Requests should be sent as FormData
Post /api/Document/Download	responses are sent as binary content

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 se minor is not then it'll use lates minor for the spefified major version. If major and minor are specif	t then it'll use the latest version. If major is specified and fied 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.

	Sync	Service	S				
	Refresh	New File Task	New Table Task		New Snapshot Task	New Api	Task S
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l		Name					
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## 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.

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### **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.

Item T12300000059			i 🖉 🖻 ? ×
	30: A	-Site M5 Assembly	Complete Action
Controlling User Atchu Product Pixel 9	wd	cqwdv	Scrap Scrap - Replenish from start op
Serial # <b>T12300000059</b>			Scrap - Replenish at current op
Work Centre 225 Operation			Pause
A-Site M5 Assembly Qty 8 of 8			Continue and Log Off
Activity Time Oh 1m			Notes (0)
Actions Instruction Action test			Documents (49) Item Status

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.

Recyc	le I	Bin						
Record Type	WORK	FLOWNODE >	¢		From 01/09/2024	<b>To</b> 24/01/2025	Fi I	Name
	WORKFLOWACTION ×		×					lane
Refresh								
Revision H	listory	Recycle Bin Fo	r Linked Records					
Туре		:	Deleted On	:	Deleted By		:	Name
WORKFLOW	NODE		29/10/2024 09:10:2	1	Gopal Gaurav			Convert
WORKFLOW	NODE		29/10/2024 09:30:3	37	Gopal Gaurav			Convert
WORKFLOW	NODE		29/10/2024 11:56:1	3	Gopal Gaurav			Convert
WORKFLOW	NODE		29/10/2024 09:05:	52	Gopal Gaurav			Convert
WORKFLOW	IODE		31/10/2024 12:22:0	2	Arturs Kupce			TEST1

istory											
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

Recycle I	Bin For Linked I	Records					
	ISSUEITEM ×						
	WORKFLOWOPERA	TIONPROP ×					
	WORKFLOWNODE_	SKILL ×					
Record Type	WORKFLOWNODE_	CUSTOMFILE ×		From	E		
	WORKFLOWNODER	ESOURCEREQ ×					
	WORKFLOWACTION	×					
	JOBOPERATIONPLA	N ×					
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WORKFLOW	ACTION	09/10/2024 17:33:15		Arnav (Mestec Support)			
WORKFLOW	OPERATIONPROP	09/10/2024 17:33:16		Arnav (Mestec Support)			
WORKFLOW	OPERATIONPROP	09/10/2024 17:33:16		Arnav (Mestec Support)			
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WORKFLOW	OPERATIONPROP	09/10/2024 17:33:16		Arnav (Mestec Support)			

#### 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.

Edit Dispatch C	Order Line Item	i 🖋 ? ×
Product	**D4**Product 001	× •
I 3rd Party Part No		
* Line No	1	*
A Qty Ordered	100.000000000	*
A Min Qty	100.000000000	*
C Max Qty	100.000000000	*
Unit Of Measure	EA	Ŧ
Planned	11/12/2024	Ť.
Customer Po		
Sales Order		
Pallet Ref		
Comment		
Is Restricted By Sales Order Reference	No	<i>/</i> ,
	Yes	
4	No	Cancel

#### **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.

Purchase Orde	rs													
Search	Search Include Closed													
					Purchase Orders									
Add Edit Delete Print														
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Lucy	Purchase Orders Only	lucy												Yes
DEMO PO	Purchase Orders Only													Yes
**D4**POnumberD	**D4**Organization													Yes
P0021112	**D4**Organization													Yes
GG02	**D4**Organization													Yes
AJ21112024	Amit Industries													Yes
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#### 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.

	nu Search									
Select Shift									i 🖋 🗆	? ×
If you are already clocked in, this wi	ll edit your existing at	tendance log. If yo	u want	to create a ne	w atten	dance log then c	lock o	ut and clock back in		
Team Name		Work Pattern	:	Shift	:	Start	:	End	Clocked In	
Drms_Team2	:	24 hour	:	24 Hours	:	06/01/2025 00:		06/01/2025 23:30	06/01/2025 16:2	: 0.20
Default		24 hour		24 Hours		07/01/2025 00:		07/01/2025 23:30	00/01/2023 10:2	9:20
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### **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.

