

CAUTION !! All new procedures and processes should be checked in the 'Test' environment before being applied to the 'Live' business system.

ARCHIVING BOM COSTINGS – Ver 2

1. INTRODUCTION

The situation sometimes arises where it is necessary to keep a record of product structure and costs prior to BOM amendments. This datasheet describes a method to retain BOM's and associated costings for reference purposes within the standard system.

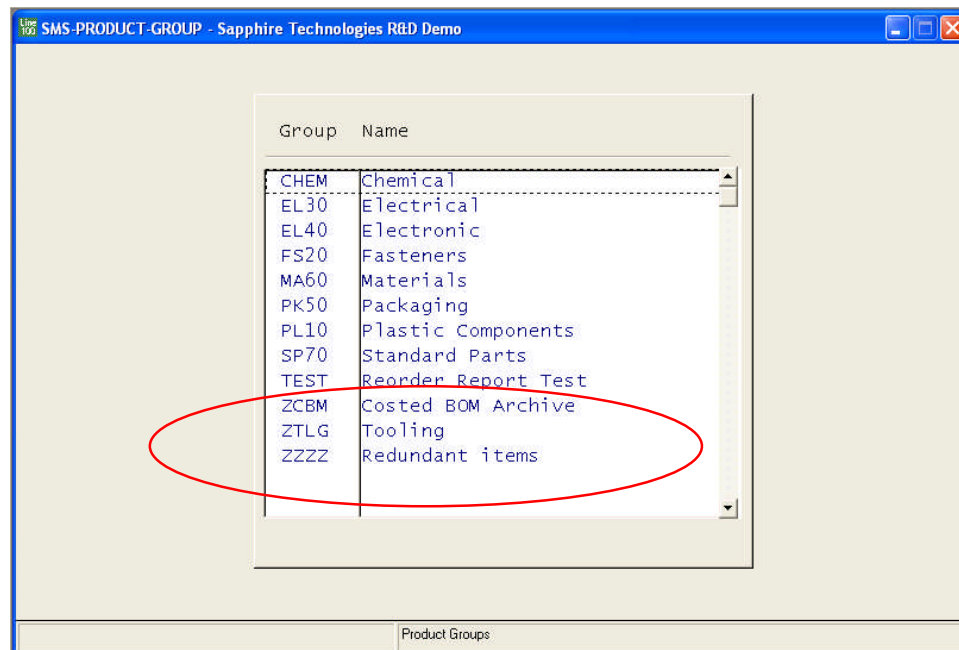
2. SET UP REQUIREMENTS

The process operates by copying the BOM to a new Item Number and associated BOM, held in a separate Product Group.

Product Groups prefixed with the letter 'Z' can easily be excluded from the various selection filters used throughout the system, and the 'Costed BOM Archive' Product Group should be in this section. An example is shown below

2.1 PRODUCT GROUP

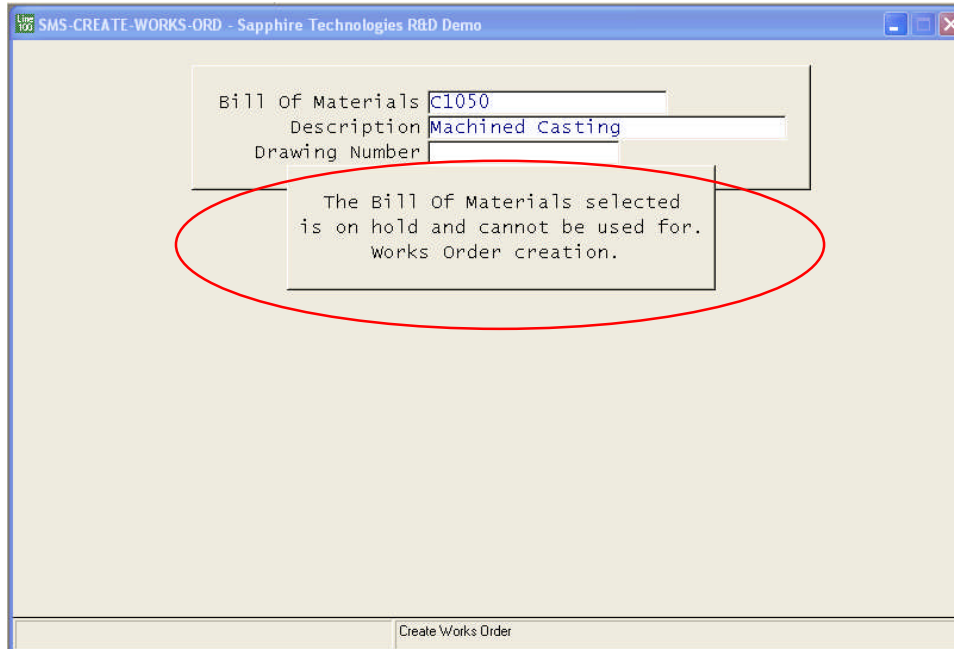
Stock Control, Utilities, Parameters, Product Groups



2.2 BOM Hold

Bill of Materials, Transaction Entry, Place BOM On Hold

All BOM's in the (for example) ZCBM Product Group should be placed 'On Hold'. This will prevent them from being manufactured by inhibiting the creation of a Works Order – see below.



Consideration should be given to which users will have the authority (menu option) to Place BOM's On Hold, and equally importantly, Release BOM's from Hold

Note !!

Whilst not essential, but as an option, the Stock Item could also be made redundant. (See *Stock Control, Stock Item Maintenance, Stock Redundancy*) This would generate a warning message if a user tried to raise a Sales Order for the item.

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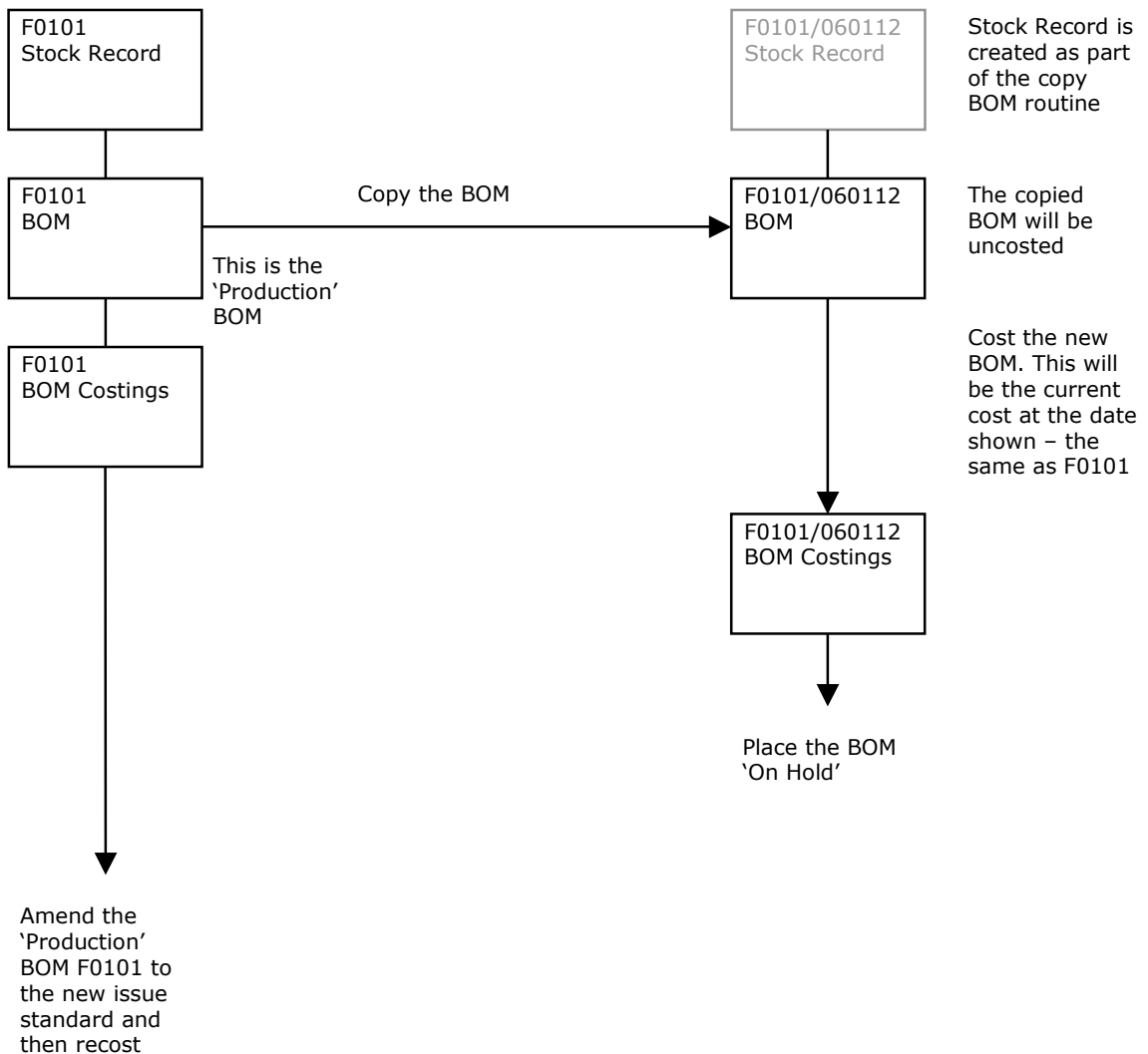
Unit A, Tayside Software Centre, Dundee Technology Park, Dundee, DD2 1TY
Tel: 0870 086 9055 Fax: 0870 086 9056 Email: sales@bluestone-solutions.co.uk www.bluestone-solutions.co.uk
South West office 2430/2440 The Quadrant, Aztec West, Almondsbury, Bristol, BS32 4AQ Tel 01454 877695
Midlands office Imperial House, St Nicholas Circle, Leicester LE1 4LF Tel 0116 242 4023

3. PROCESS

As an example, assume that item number F0101 is the BOM that is to be amended and then recosted. The current/original costing as at say the 12th January 2006 is to be retained.

The Item Number of the archived part could be changed to show the date that it was amended/archived. By entering the date in YY/MM/DD format the item records will be sorted correctly in any enquiries or reports (ascending date order). In this example the Item Number would be F0101/060112.

Alternatively the item could be suffixed with the version number, for example F0101/1. It could also be prefixed to ensure that it is shown at the end of the Stock File/BOM listing and separated from Production items. For example, Z/F0101/060112



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Tel: 0870 086 9055 Fax: 0870 086 9056 Email: sales@bluestone-solutions.co.uk www.bluestone-solutions.co.uk

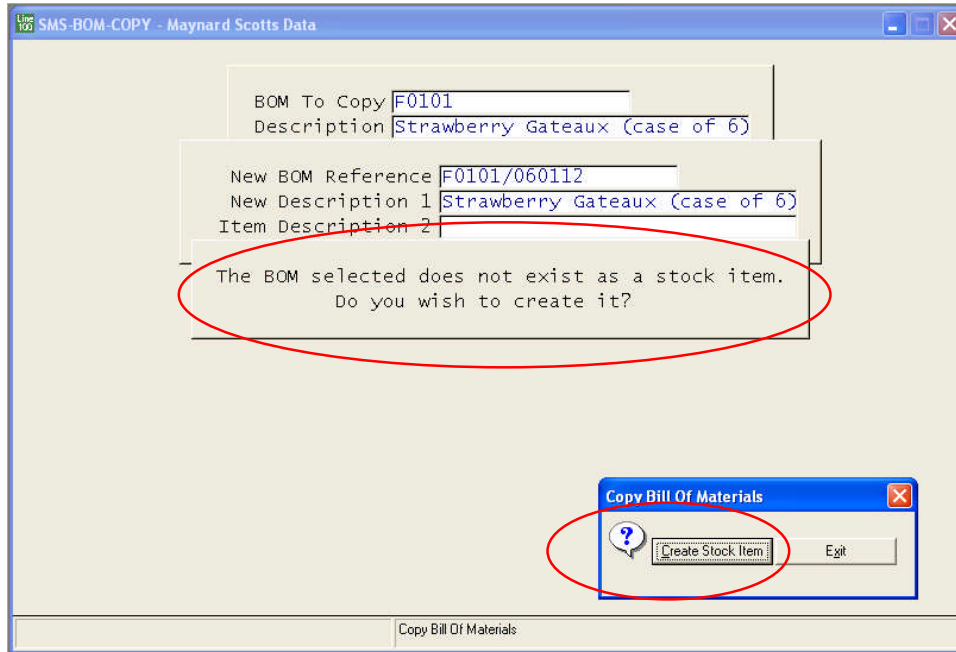
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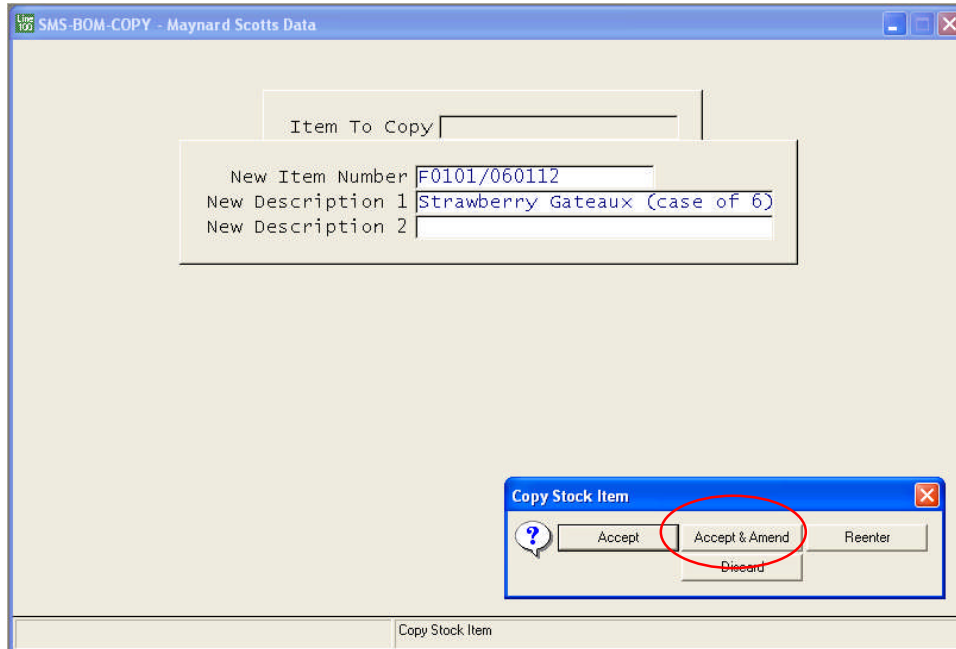
4. EXAMPLE OF THE ABOVE PROCESS

4.1 Bill of Materials, BOM Maintenance, Copy BOM

Select the BOM to copy **FROM** (F0101), and then enter the New BOM Reference to copy **TO** (F0101/060112). The system will recognise that the Stock Item does not exist and prompt the user to create it. Select 'Create Stock Item'.



4.2 At the Copy Stock Item screen, select Accept & Amend



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Data Sheet for Archived BOM Costings

Change all of the Copy Options to 'N' and then Accept

The screenshot shows the 'SMS-BOM-COPY - Maynard Scotts Data' window. The 'Copy Options' dialog box is open, listing several options to be copied: Depots, Attributes, Prices, Notes, Approved Suppliers, Supplier's Item No, and Qty/Price Details. All these options are currently set to 'NO'. A red circle highlights the 'NO' values in the 'Copy Options' dialog box.

Copy Option	Value
Depots	NO
Attributes	NO
Prices	NO
Notes	NO
Approved Suppliers	NO
Supplier's Item No	NO
Qty/Price Details	NO

Change the Product Group to the Costed BOM Archive and then Continue

The screenshot shows the 'SMS-BOM-COPY - Maynard Scotts Data' window. The 'Product Group' is set to 'ZCBM Costed BOM Archive', which is circled in red. The 'Stock Item Maintenance' dialog box is open, showing 'Update Gims' and 'Continue' buttons. The 'Continue' button is circled in red.

Field	Value
Item Number	F0101/060112
Description	Strawberry Gateaux (case of 6)
Product Group	ZCBM Costed BOM Archive
Product Family	
Sector	
Serialised Stock	NO
Default Depot	
Bin	
Use Quantity In	1 Each
In Stock	0.0000 Each
Promised (SO/WO/TR)	0.0000 Each
On Order (WO/PO/TR)	0.0000 Each
Last Order Entered	
Next Order Due	
Last Stock Take	

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Data Sheet for Archived BOM Costings

ESC, ESC and then Accept to display the Depot warning message. Click OK, and then 'Add Default Depot' followed by Exit. The Stock Item has now been created.

SMS-BOM-COPY - Maynard Scotts Data

Item Number: F0101/060112
Description: Strawberry Gateaux (case of 6)

Product Group: ZCB
Product Family:
Serialised Stock: NO
Default Depot: Bin

Use Quantity In: 1 Each

In Stock	0.0000	Each
Promised (SO/WO/TR)	0.0000	Each
On Order (WO/PO/TR)	0.0000	Each

Last Order Entered:
Next Order Due:
Last Stock Take:

Stock Item Maintenance

Stock Item Maintenance

Click OK to Continue

OK

4.3 The 'Copy BOM Options screen' is now displayed. Return over all the options to leave them set as 'YES' and then press Accept, followed by OK to Continue. The screen will then close as the BOM has now been copied.

SMS-BOM-COPY - Maynard Scotts Data

BOM To Copy: F0101
Description: Strawberry Gateaux (case of 6)

New BOM Reference: F0101/060112
New Description 1: Strawberry Gateaux (case of 6)
Item Description 2:

Copy BOM Options

BOM Header Notes	YES
Components	YES
Component Notes	YES
Operations	YES
Operation Notes	YES
Resources	YES

Copy Bill Of Materials

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- 4.4 The new BOM (F0101/060112) can now be costed. (See separate datasheet)
- 4.5 Place the new BOM on Hold.
- 4.6 The original BOM (F0101) can now be modified/amended and recosted as required.

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