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Purpose: To properly maintain Item Form fields based upon the source of an item changing (Source can be Manufactured, Purchased or Transferred)

Related Documents:

PL1034 User Guide: S8 Supply Chain Items Basic

# Responsible:

Maintained by: Supply Chain Continuous Improvement (SCCI) Coordinator

Approved by: Production Planning and Inventory Control (PPIC) Manager or Supply Chain Manager;

Executed by: Planners

# Rules:

1. As needed
2. If Sytelean item, notify SCCI to ensure Sytelean is updated by removing the item, etc.
3. The recipient of the request is responsible to communicate the change to any other planners or buyers affected by the change.

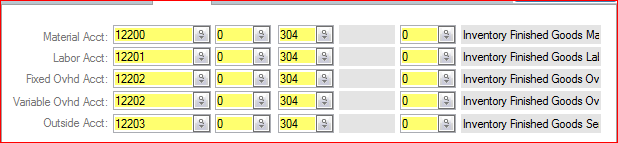
# Instructions:

1. Upon request Open the Items Form and filter for the item to be changed
2. Make initial decision on whether item should have SS or not (this decision needed for variety of update decisions. Basic rules (for components)
   1. FG Type Stock or Standard– all item with sufficient usage should have SS.
   2. FG Type Special – should have 0 SS.
3. Matrix Columns:
   * 1. C&S- PLN Responsible for planning of Micro, HCD and/or Crystals departments
     2. MS-PLN Responsible for planning of Machine Shop
     3. PROD-PLN Responsible for planning one or more production assembly cells
4. Matrix Legend:
   * 1. R = Responsible
     2. V = Verify
     3. O = Optional
     4. X = Information needed for other field decision

|  |  |  |  |
| --- | --- | --- | --- |
|  | C&S-PLN | MS-PLN | PROD-PLN |
| FG Type | X | X | X |
| Product Code | V | V | V |
| Buyer | O | O | O |
| Lot Size | V | V | V |
| Safety Stock | V | V | V |
| Planner Code | R | R | R |
| Supply Site | R | R | R |
| Family Code | R | R | R |
| Lead-Time | R | R | R |
| Time Fence Rule | R | R | R |
| Order Minimum | R | R | R |
| Order Multiple | R | R | R |
| Order Maximum | R | R | R |
| Days Supply | N/A | N/A | R |
| Contractual | X | X | X |

# Field Level Instructions:

1. FG Type: (X) Used to review / update:
   1. Lot Size, Safety Stock, Time Fence, Order Min/Mult/Max, Day Supply.
2. Product Code: **(V).** 
   1. Notes:
      1. When the FG Type is changed the system:
         1. assumes the current product code is correct and
         2. automatically updates the last digit of the UC2 G/L Account Code through the BOM via the nightly sync program.
      2. The product code is independent of the Source (purchased, manufactured, transferred If a lower level item and has a PCB drawing then it is an SA or an MS. Ex: a purchased circuit board is an SA, a purchased MS component is an MS. RM is used for ‘catalog’ items – items with no PCB drawing, purchased as an ‘off the shelf’ item to the suppliers specification/drawing.
   2. Determine if the Product Code prefix is correct – RM, SA, MS, 0 (FG) based upon Notes. If not, change the product code prefix ONLY and update the G/L codes in the Stock / Loc (see c. i. below)
      1. If you believe based on sales market assignments that the UC2 value is incorrect then getconsensus / approval from the Product Manager before changing.
   3. If the Product Code needs to be changed:
      1. Open Items Form: change ITEM to the correct Product Code, Save (do not close out of Items Form)
      2. Update the G/L accounts for the stockroom locations
         1. Select the Stockroom Loc button
            1. Select the Accounts tab
            2. Copy and past the correct G/L information from the grid or
            3. Manually update the G/L information per the grid.



GL Account

UC1

UC2

UC4









1. Buyer: **(O) )** 
   1. Can use this field to link multiple planner codes; identify ‘special’ groups of item (e.g. platinum items) for the purpose of working in a more efficient manner.
   2. To use an existing Buyer Code simply type it in. If you want to create a new Buyer Code, Open PL1034, select “Buyer” from Table of Contents for the format to use.
2. Lot Size: **(V)** Syteline uses the lot size to calculate cost for manufactured items that **have setup hours** in current operations. 
   1. C&S / PMC Planners: The lot size should equal the standard run size (job size) so actual and standard cost relate.
   2. Production Planners – should be set to 1 unless there are set-up hours in the router for the Item
3. Planner Code: (R)
   1. Update the planner code to correspond with the new source.
   2. If the original planner code was a SyteLean planner code (begins with K), notify SCCI to remove the item from *SyteLean* and recalculated safety stock.
4. Supply Site: (R)
   1. If source is changing to Transferred, enter the transfer site and warehouse that supplies the item to the current site.
   2. If source is changing from Transferred, remove the transfer site and warehouse information.
5. Family Code: (R)
   1. In the PCB site, if blank select a Family Code from the drop down using the following rules:
      1. If the item is a configured child, set the family code the same as the parent
      2. Transfer in PCB and Manufactured in NC - match the NC site or get approval if different
      3. Transfer in PCB and Purchased in NC – Blank
      4. Manufactured in PCB and a Finished Good - based as work center
      5. Manufactured in PCB and a Subassembly that DOES count as T - based as work center - family code same as finished goods
      6. Manufactured in PCB and a Subassembly that DOES NOT count as T - based as work center with a -1 or -2. Family codes of -1 or -2 do not count as SA or T
      7. Manufactured in PCB and a C&S item - based as work center
      8. Manufactured in PCB and an Machine Shop item - based as work center – SHOP
      9. Purchased in PCB – Blank
   2. In the PCB site, to Delete/Modify a Family Code use the following rules:
      1. Transfer in PCB and Manufactured in NC - match the NC site or get approval if different
      2. Transfer in PCB and Purchased in NC – Blank
      3. Manufactured in PCB - requires approval
      4. Purchased in PCB – Blank
   3. In the NC site, to Select/Delete or Modify a Family Code use the following rules:
      1. Manufactured in NC - always requires approval
      2. Purchased in NC – Blank
      3. Transfer in NC but Manufactured in PCB - Match Depews Family Code or get approval
      4. Transfer in NC but Purchased in PCB – Blank
6. Lead-Time: (R)
   1. ***Paperwork Lead Time:*** (R)
      1. Set to 0
   2. ***Fixed Leadtime: (R)***
      1. If manufactured and no Router then enter 20. (APS will use fixed leadtime until a Router is entered).
      2. If purchased, use purchasing lead-time in business days.
      3. If transferred, use transfer site lead-time.
   3. ***Expedited Fixed Lead Time: (R)***
      1. Set to 0 for manufactured and transferred items.
   4. ***Dock-to-Stock Lead Time: (V)*** 
      1. Set to 0 (for manufactured and transferred items, purchasing has different ruleset)
   5. ***Expedited Variable Lead Time (R)***
      1. **Set to 0**
7. Time Fence Rule: **(R)**
   1. If item has/should have Safety Stock – set rule to Lead Time
   2. If item has no/should have no Safety Stock – set rule to “No Time Fence”
8. Order Mult: **(R)** 
   1. If Item must be run in a certain quantity (due to fixture capacity or some other ‘batch’ size constraint) set the Order Mult to that quantity.
   2. Otherwise set to 1.
9. Order Min: **(R)** (Must be set to at least 1, must be divisible by Order Mult.)
   1. If Order Mult is greater than 1, Order Min must be equal to Order Mult. OR be divisible by Order Mult. (e.g. if Mult is 50, the Order Min can be 50, 100, 150, etc.)
   2. If Order Mult is 1 and
      1. FG Type = Stock or Standard, set the order min to normal production job quantity or 1
      2. FG Type Special
         1. If Contractual with SS assigned – set to normal production job quantity
         2. Otherwise set to 1
10. Order Max: **(R)**  DO NOT USE – Set to 0
11. Days Supply: **(R)**
    1. Set to 0 for non-SyteLean manufactured items
    2. For SyteLean items which are manufactured set to Order Maximum divided by Average Daily Usage (ADU).
    3. For Transferred Items set Days Supply to:
       1. FG Type Stock : 5
       2. FG Type Standard: 10
       3. FG Type Special: 1
12. Contractual: **(X)** Used to review Saftey Stock

1. Safety Stock: **(V)**
   1. If FG Type is Special (P) - planner must check to see if the Contractual Flag is checked for the Item.
      1. If Contractual Flag is set – do not modify SS.
      2. If Contractual Flag is not set - change SS to 0. (Items Form, Select Item Warehouse Link, change value of Safety Stock to 0, Save.).
   2. If FG Type is Stock (S) or Standard (D) and is a component review the current SS
      1. If Safety Stock quantity does not seem correct:
         1. Verify that your Order Modifiers are correct
         2. If the order modifiers are correct, send a request to the Supply Chain Continuous Improvement Coordinator (SCCI) to review and respond.