

SOP ISSUE TO FLOOR STOCK (IFL)
TASKS

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AIM

To issue inventory in bulk from a designated issuing warehouse to the factory floor. This process begins with the creation of a wave of issue to floor tasks, continues with task reporting, and ends with the creation of the relevant inventory document (Issues to Floor Stock).

Note: The instructions in this document are only relevant when issuing parts in bulk. To issue parts to a kit (for a specific work order), see the SOP for issues to kits.

WORKING ASSUMPTIONS

- The necessary setups have been performed for the WMS module (see the relevant standard operating procedure).
- A Status has been defined which is assigned automatically to inventory documents prepared upon completion of an issue to floor task (in the Document Types per Task Type form, a sub-level of Warehouse Task Types). Otherwise, the default initial status is assigned to these documents.
- The IFloorInv constant has been defined in the Logistic Constants form with the value that is appropriate to your factory's production methods. To have issues prepared automatically on the basis of minimum stock levels, specify 1. To have issues prepared on the basis of open, released work orders, specify 2. To have them prepared on the basis of production planning or MRP, specify 0.
- Minimum floor stock levels or released, open work orders (depending on the value of the IFloorInv constant) have been recorded for parts whose required child part(s) are flagged for issuing to the plant floor.

PROCEDURE

STAGE ONE: CREATING AN ISSUE TO FLOOR STOCK WAVE

Aim: To create IFL tasks, with which to issue inventory in bulk to the plant floor.

1. Run the Create Bulk Issues to Floor Wave program.
2. In the first input screen, fill in the following details:
 - Source Warehouse – Specify the warehouse from which inventory will be issued.
 - For Floor Warehouse – Specify the floor warehouse in which inventory is required.
 - Task Date – Designate the date on which tasks generated by this wave will be opened. Today's date is filled in automatically but can be revised.
 - Priority – Indicate the relative importance to be assigned to warehouse tasks created by this wave.
 - Indicate the Max No. of Lines that can be included in each issue task created by this wave. This value affects the number of tasks created by the wave.
 - Make sure the Auto Release column is flagged, and the Auto Flagging and No Auto Flag Check columns are *not* flagged.

3. In the next input screen, fill in the following details:
 - From Zone/Main Zone – Specify the storage zone from which inventory will be issued.
 - From Velocity – To issue inventory only from those bins with a specific part velocity, designate the velocity in question. Alternatively, leave this column blank to issue inventory from bins with different velocities.
4. The Issues to Floor Stock form opens. Retrieve the issue document for which issue tasks are to be created and exit the form.
5. The Flag Inv for Bulk Issues to Flr form opens, displaying inventory in the specified source warehouse that is available for issue to the plant floor (calculated using the method indicated by the value of the IFloorInv constant). You can perform a query, if desired, in order to display only the desired issue items. For each item, do one of the following:
 - To include the entire issue quantity listed for the current item, flag the Select column.
 - To issue only part of this quantity, specify the desired quantity in the Qty (Factory Units) column.
6. Exit the form to finish creating the issues wave.

RESULT

Issue to Floor Stock (IFL) tasks have been opened with the "Execute" status.

STAGE TWO: MANUALLY REPORTING TO AN IFL TASK

Aim: To report performance of an Issue to Floor Stock (IFL) task.

Note: This stage is relevant for warehouse personnel who do not use mobile devices for reporting.

1. Enter the Warehouse Tasks form.
2. Retrieve the task assigned to you with the "Execute" Status.
3. If necessary, you can print the task by selecting Print Warehouse Tasks from the list of Direct Activations.
4. Enter the Warehouse Task Items sub-level form.
5. In the Actual Qty column, specify the issued quantity for each part.
6. In the upper-level form, change the task Status to "Fully Reported".

RESULT

Issued quantities have been reported, but inventory balances have not yet been updated in the system.

STAGE THREE: PREPARING INVENTORY DOCUMENTS

Aim: To update inventory balances in the system, as a result of the task reported by warehouse personnel.

Note: This stage is relevant for warehouse personnel who do not use mobile devices to prepare inventory documents.

1. Enter the Warehouse Tasks form.
2. Retrieve the task assigned to you with the "Fully Reported" Status.
3. To create an Issues to Floor Stock document, select Prepare Documents from the list of Direct Activations.

Note: The issue document will be finalized if a final status was defined for inventory documents prepared upon completion of an Issue to Floor Stock task (in the Document Types per Task Type sub-level of the Warehouse Task Types form). Otherwise, see the relevant standard operating procedure for further instructions on handling this document.

RESULT

Inventory balances have been updated in the system, and an Issues to Floor Stock document has been created, recording the issue of goods from the issuing warehouse to the floor warehouse.

PROCESS SUMMARY

As a result of the reported Issue to Floor Stock (IFL) tasks, inventory has been issued to the plant floor on the basis of actual task reports.