

PERCEPTION[®] MAT-PAC

Starting From Scratch

Material Planning, Purchasing & Inventory Control

A Training Tutorial

This training tutorial outlines the basic preliminary steps necessary to use *PERCEPTION MAT-PAC* for material planning, purchasing & inventory control.

It is a supplement to the user manual entitled “*PERCEPTION Material Planning, Purchasing & Inventory Control*,” which provides more details for the user.

Before using this tutorial, the user should first view the preliminary *PERCEPTION* training tutorial, “Getting Started.”

Other related training tutorials for material control are the following:

- 1. Starting A New Project**
- 2. Managing Drawings & Bills of Materials**
- 3. Material Requisitions**
- 4. Purchase Orders**
- 5. Work Order Pallets**
- 6. Tool Room Control**
- 7. Developing A Parts Catalog**
- 8. Managing Stock Inventories**
- 9. Receiving & Warehousing**
- 10. Withdrawing Material to Production**
- 11. Managing Vendor Invoices**
- 12. Managing Customer Billings**

Training Directory

-  **Continue**
-  **Vendor Catalog**
-  **Phone Numbers**
-  **Standard Terms**
-  **Clauses**
-  **Foreign Currency**
-  **Stores Management**
-  **Material Control Documents**
-  **Material Cost Management**
-  **Scheduling Material Requirements**

When *PERCEPTION* is first installed, the following tables in the database should be defined prior to beginning any production use of the system:

- 1. Defining general company operations parameters.**
- 2. Defining company work centers (areas of responsibility and process stages).**
- 3. Defining units of measure.**

The above files are described and instructions on how to define and manage them are provided in the training tutorial “*PERCEPTION - Getting Started.*”

If the Parts Catalog is to be used for stock and standard parts items, this catalog should be set up beforehand.

The training tutorial “*PERCEPTION MAT-PAC - Developing A Parts Catalog*” provides details.

Purchasing Database Files

For purchasing, the following database files need to be established:

- **Vendor catalog**
(Click on *Library/Vendor Catalog*)
- **Standard Terms & Conditions**
(Click on *Environment/Purchasing/Terms*)
- **Standard Purchase Order Clauses**
(Click on *Environment/Purchasing/Clauses*)
- **Purchase Order Distribution Lists**
(Click on *Reports/Maintain Recipient Lists*)
- **Foreign Currency Table**
(Click on *Library/Currency*)

Vendor Catalog

The Vendor Catalog stores all vendors and suppliers used to issue purchase orders.

To access the Vendor Catalog worksheet, select *Library/Vendor Catalog* from the main menu.

	Vendor	Vendor Name
1	A111	ABB CE Power Products Mfg
2	A110	Aeroquip Corp
3	A108	A-J Marine, Inc.
4	A103	Albacore Research LTD
5	A112	Ampco Pumps
6	A113	Aqua Dyne Inc.
7	A104	Band Lavis & Associates
8	A105	Canadian Shipbuilding & Engineering
9	A106	Designers & Planners
10	A109	Hopeman Brothers
11	A102	Kvaerner Masa Marine, Inc.
12	A107	Proteus Engineering
13	A101	SPAR Associates, Inc.

Vendor Catalog Worksheet

The Detail Vendor Tab Window can be displayed by double clicking the selected vendor.

**Vendor ID &
Name Tab
Window:**

The screenshot shows a window titled "\$ Vendor Information Detail" with two tabs: "Vendor" and "Vendor Details". The "Vendor Details" tab is active, displaying a form with the following fields:

Vendor:	A101	Vendor Name:	SPAR Associates, Inc.
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The screenshot shows a window titled "\$ Vendor Information Detail" with two tabs: "Vendor" and "Vendor Details". The "Vendor Details" tab is active, displaying a table with the following data:

Vendor	Vendor Detail ID	Company Name	Address Line 2	Address Line 3	City	State	Country
1A101	Main Office	SPAR Associates, Inc	927 West Street	Suite 101	Annapolis	MD	USA
2A101	Accounting Department	SPAR Associates, Inc	927 West Street	Suite 102	Annapolis	MD	USA
3A101	Sales Office	SPAR Associates, Inc	927 West Street	Suite 103	Annapolis	MD	USA

Vendor Address(s) Tab Window:

Double click on a selected Vendor Detail ID to display detail information about the vendor.

Vendor Information Detail				
Vendor	A101	Vendor Detail ID	Main Office	
Company Name	SPAR Associates, Inc	Point of Contact		
Addr 1	927 West Street	Phone	(410) 263-8593	
Addr 2		Fax	(410) 267-0503	
City	Annapolis	Int'l Phone Code		
State	MD	Zip	21401	
Country	USA	Email Address	info@sparusa.com	
		WEB Site Address	www.sparusa.com	
Payment Terms	2%10, NET 30 DAYS		Currency	US \$

Vendor Detail Information

The currency for each vendor defaults to the currency on the Company Defaults table (*Library/Company Parameters/Company Defaults*).

If the vendor is located in a country that uses currency other than the company's domestic currency, change the currency on the Vendor Detail Information table to one that matches in the foreign currency table (*Library/Currency*).

The currency that is defined with the vendor will become the default currency when a purchase order is created.

Users may manually change the currency for a PO.

Default terms and conditions for the vendor can be defined for each vendor from the valid terms defined in the terms and conditions table (*Environment/Purchasing/Terms*).

The system will default to these terms when a purchase order is created, although the user may change them for an individual purchase order.

Phone Number Format

The system uses a phone number format programmed according to the international standard format:

1. Country Code: 3 digits
2. Area/City Code: 4 digits
3. Local Code: [2 or 3-digits] + [3, 4 or 5-digits]

If the local code has a format of xx-nnnnn, type in the initial 2-digits, then use the right arrow key on the keyboard to complete the code. The software always inserts the “-“ after the first 3 characters, which in this case would include a trailing blank.

Country Code	Area/City Code	Local Phone #
011	410	263-8593
011	4102	263-85934
011	4102	263-859345
011	4102	26 -859345

Standard Terms & Conditions

The Terms Table may store standard terms and conditions for purchase orders.

By cataloging them into a database table, purchase orders can be generated by selecting from the pre-defined terms.

Any purchase order can have non-standard terms as well using the system's editing functions on the purchase order header or footer.

To access the Terms Table worksheet, select *Environment/Purchasing/Terms* from the main menu

\$ Terms Information					
	Terms ID	Description	Discount	Discount Days	Days Due
1	1%10,NET	1% 10 , NET 30	0.00%	10	30
2	15	NET 15 DAYS	0.00%	0	0
3	2%10/30	2%10, NET 30 DAYS	2.00%	10	30
4	2%15/30	2% 15, NET 30 DAYS	2.00%	15	30
5	2%20NET3	2%20, NET 30 DAYS	2.00%	20	30
6	30	30 Day's Term for delivery	0.00%	0	30
7	60	60 Days Term Delivery with early 10% discount	10.00%	30	60
8	BELOW	SEE BELOW	0.00%	0	0
9	Demo 30	Net 30 Days	10.00%	10	30
10	MONTHLY	MONTHLY	0.00%	0	0
11	Net 60	Net 60 Days	3.00%	5	60
12	Net10	Net 10 Days	2.00%	2	10
13	Net30	Net 30 Days	10.00%	10	30
14	Net30/10	Net 30 Days with 10 days discount	2.00%	10	30

Standard Purchase Order Terms Table

The Terms ID can be any 8-character string (or less) that easily identifies the specific terms.

The “Discount,” the “Discount Days” and “Days Due” are information used by the Vendor Invoice processing functions (*Environment/Accounting/Vendor Invoices*).

- **The discount data are terms offered by a vendor that discounts the vendor’s invoiced amounts if the shipyard pays the invoice within the specified number of (discount) days.**
- **The “Days Due” is the number of days after receipt of a vendor’s invoice that the vendor will consider the invoice in arrears.**

Purchase Order Clauses

Purchase orders may use clauses for headers and/or footer information to provide additional guidance to the vendor.

By defining PO clauses, such as QA requirements, special terms, contract specifications, etc., they can be incorporated into the PO as headers or footers, without repeated typing.

Purchase order clauses may be defined by selecting *Environment/Purchasing/Clauses* from the main menu.

Clauses			
Clause ID	Clause	Clause Flag	
1	CERT DRW CERTIFIED DRAWINGS: FOUR (4) COPIES OF FULLY CERTIFIED WORKING PLANS SH	Material	▼
2	CERTIF CERTIFICATES SHALL BE SUPPLIED IN QUADRUPPLICATE FREE ISSUE TO P.W.D.D..	Material	▼
3	Confirm THIS PO IS CONFIRMATION OF VERBAL ORDER GIVEN TO	Material	▼
4	DEL PEN DELIVERY PENALTY: IF THE TIME FIXED FOR DELIVERY IS NOT ADHERED TO AND TH	Material	▼
5	DELIVERY DELIVERY: ALL MATERIAL SHALL BE DELIVERED IN P.W.D.D. NO LATER THAN	Material	▼
6	Demo This purchase order is subject to verification and acknowledgment from vendor prior to any an	Material	▼
7	DESPATCH DESPATCH: ALL MATERIAL SHALL BE F.O. B.	Material	▼
8	DUTY DUTY: ANY APPLICABLE DUTY SHALL BE TO	Material	▼
9	FAX THIS PO IS CONFIRMATION OF PWDD FAX DATED	Material	▼
10	FIRM PRC FIRM PRICE: THE PRICE QUOTED BELOW IS FIRM FOR THE DELIVERY DATE.	Material	▼
11	GEN NOTE GENERAL NOTE: SHOULD ANY ADVERSE SITUATION ARISE WHICH MAY DELAY DELI	Material	▼
12	INST.MAN INSTRUCTION MANUALS: FOUR (4) COPIES OF FULLY CERTIFIED SPARE PARTS, MAI	Material	▼
13	PO Foot This purchase order must be acknowledged prior to shipments. If this PO is not acknowledge	Material	▼
14	PO Head This purchase Order is subject to verification and acknowledgement from vendor prior to any d	Material	▼
15	PROG.REP PROGRESS REPORT: A BI-WEEKLY PROGRESS REPORT SHALL BE SUBMITTED DUR	Material	▼
16	SALES TX SALES TAX: ALL EQUIPMENT SHALL BE EXCLUSIVE OF P.S.T..	Material	▼
17	TERM PAY TERMS OF PAYMENT:	Material	▼
18	TITLE TITLE OF GOODS: P.W.D.D. SHALL HAVE TITLE TO GOODS ON PAYMENT OF FINAL IN	Material	▼
19	WARRANTY WARRANTY: ALL MATERIAL SHALL BE GUARANTEED FOR A PERIOD OF TWELVE (12	Material	▼

Purchase Order Clauses Worksheet

The Clause ID is character based and will allow up to eight characters.

The clause itself can be an unlimited number of characters.

Foreign Currency Exchange Table

Foreign currency exchange rates are used on purchase orders when the purchase order is to be issued in foreign currency funds.

The system automatically converts all foreign currency funds to equivalent domestic currency:

Equivalent Domestic Currency =

Purchase Order Foreign Currency x Exchange Rate

The foreign currency conversions are applied to provide domestic currency equivalent costs to the following:

- 1. Purchase order total cost**
- 2. Unit price on the Parts Catalog**
- 3. The weighted average unit price of a requisition item**
- 4. Total purchased cost at the project WBS levels**

The foreign exchange rates are available from a number of different sources. The following web site provides exchange rates:

<http://finance.yahoo.com>

To access the Foreign Currency Exchange worksheet, select *Library/Currency* from the main menu.

\$ Foreign Currency Exchange				
	Currency	Description	Exchange Rate	Exchange Date
1	ARP	Argentina Pesos	1.0060	11/13/2001
2	ATS	Austria Schillings	0.0641	11/13/2001
3	AUD	Australia Dollars	0.5201	11/13/2001
4	BBD	Barbados Dollars	0.5051	11/13/2001
5	BEF	Belgium Francs	0.0218	11/13/2001
6	BGL	Bulgaria Leva	0.4531	11/13/2001
7	BMD	Bermuda Dollars	1.0000	11/13/2001
8	BRL	Brazil Reals	0.4034	11/13/2001
9	BSD	Bahamas Dollars	1.0000	11/13/2001
10	CAD	Canada Dollars	0.6257	11/13/2001

Foreign Currency Exchange Worksheet

The Currency identification field is character based and will allow up to eight characters.

When the exchange rate is entered, the *Exchange Date* is set by the system to the current date.

Stores Management Files

For Stores Management, the Location database file needs to be established (*Environment/Stores Management/Locations*).

Stores Location Directory

PERCEPTION requires that all storage locations be formally identified in the storage location table. These locations are required to indicate where material is to be put:

1. When received,
2. When collected for pallets (if pallets are used),
and
3. When manufactured items are put into stores
before formal withdraw back to production.

***PERCEPTION* allows stock items and standard parts having the same Part IDs to be stored in multiple locations.**

To access the Storage Locations Directory, select *Environment/Stores Management/ Locations* from the main menu.

Storage Locations			
	Location	Control Date	Description
1	Bldg A	00/00/0000	Main Stores
2	Bldg B	00/00/0000	Stores Annex B
3	Bldg Berth	00/00/0000	Building Berth Buffer Area
4	Bldg C	00/00/0000	Stores Annex C
5	Demo	04/12/2000	Storage Location for MAT-PAC Training
6	Elect. Shop	00/00/0000	Electrical Shop
7	Fab Shop	00/00/0000	Steel Fab Shop
8	Joiner Shop	00/00/0000	Joiner Shop
9	Mach. Shop	00/00/0000	Machine Shop
10	Outside Pipe	00/00/0000	Outside Pipe Stores
11	Pipe Shop	00/00/0000	Pipe Shop
12	Platten I	00/00/0000	Platten I Buffer Area
13	Platten II	00/00/0000	Platten II Buffer Area
14	Platten III	00/00/0000	Platten III Buffer Area
15	Sheet Metal	00/00/0000	Sheet Metal Shop
16	SPARHOLDER	03/08/1999	Location automatically created by Perception - MATPAC to prevent adjustment of non-existent location.
17	Steel Yard	00/00/0000	Steel Plate Yard
18	Tool Room	00/00/0000	Tool Room
19	Wet Berth	00/00/0000	Wet berth Buffer Area

Storage Locations Directory Worksheet

Ultimately, when a Parts Catalog has been set up, the availability of these parts (stock, standard purchase and manufactured) can be displayed for any of these locations by double clicking on the desired location to review.

For material that is processed without a location specified, the system will assign a location “SPARHOLDER” automatically.

The user may wish to transfer the quantities of the material from SPARHOLDER to a correct location(s).

Material Control Documents

There are different documents that identify material requirements for different purposes:

- Cost Estimate Material Requirements List
- Drawing Bills of Material (BOMs)
- Material Requisitions
- Purchase Orders
- Work Order Pallets
- Vendor Invoices
- Customer Bills

Cost Estimate Bills of Material

If detailed by the cost estimate, bills of material can be transferred from within *PERCEPTION* to generate project material requisitions.

Engineering Drawing Bills of Material

Engineering Drawing Bills of Material (BOMs) is an optional means for defining material requirements.

Material items are listed by drawing and may be downloaded from CAD systems.

Material Requisitions

A requisition is a listing/bill of material that defines some portion of the project's material requirements.

The requisition is the basis for all project purchases and production usage (including subcontracted services) whether direct purchased or withdrawn from general stock inventory.

All purchase orders must relate to one or more a material requisitions.

Requisitions normally proceed into procurement phases, although they also may source material items from general stock inventory, including manufactured parts and assemblies.

A single requisition can source all types of items.

Items in a requisition can be developed six different ways:

- 1. Manually, item by item**
- 2. From a Cost Estimate list of materials**
- 3. From Engineering Drawing BOMs**
- 4. From production Work Order Pallets**
- 5. From “Quick Stock Withdraws”**
- 6. Copied from similar material requirements already on the database.**

Purchase Orders

Purchase Orders are formal commitments to vendors to purchase material and services.

***PERCEPTION* has special provisions for purchasing contract material versus general stock inventory material.**

Features allow use of foreign currencies and units of measure conversions as well as functions for defining various taxes and duties.

Quick Stock Withdraws

A Quick Stock Withdraw is requisition for stock material, which is normally generated spontaneously to satisfy an immediate production requirement.

This type of requisition is not quite so formal in terms of pre-planning and can be entered into the system real-time at the time the material is issued to production.

Work Order Pallets

Pallets are optional methods for managing production material.

Work order pallets are pre-planned bills of material that allow for pre-marshalling by stores personnel.

Pallets may be created from requisitions, or from engineering drawing bills of material, or extemporaneously.

Vendor Invoices

Vendor invoices can be cross-checked and controlled by *PERCEPTION*.

Normally, they must correlate with delivered purchased items, purchased prices, terms and conditions.

However, *PERCEPTION* also allows purchase orders to be generated automatically from authorized vendor invoices where formal purchase orders have not been issued to the vendor.

Customer Bills

Customer bills can be generated by *PERCEPTION*. They can be a mix of different types of charges made against a contract:

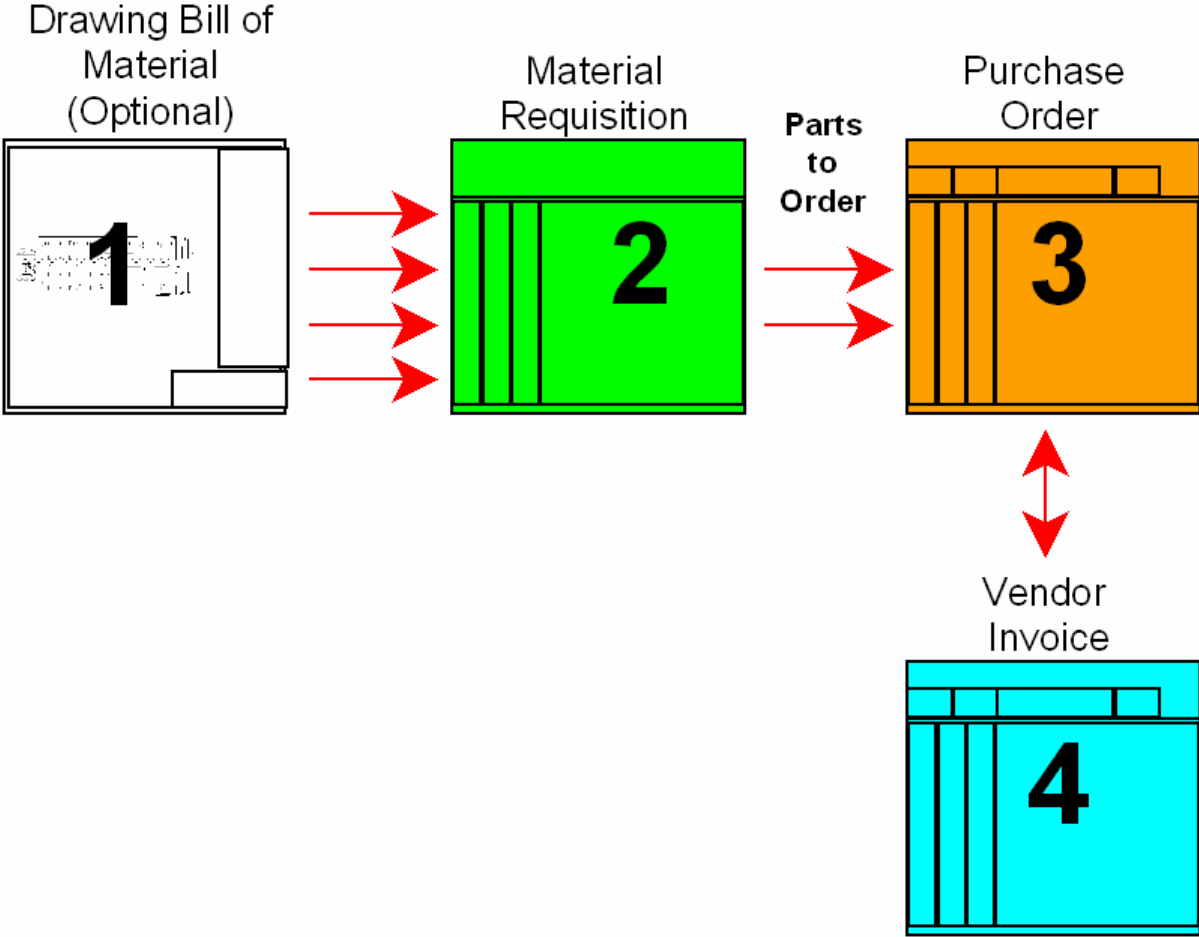
1. Milestones achieved
2. Fixed priced services
3. Time & material charges

Relationships Between Material Control Documents

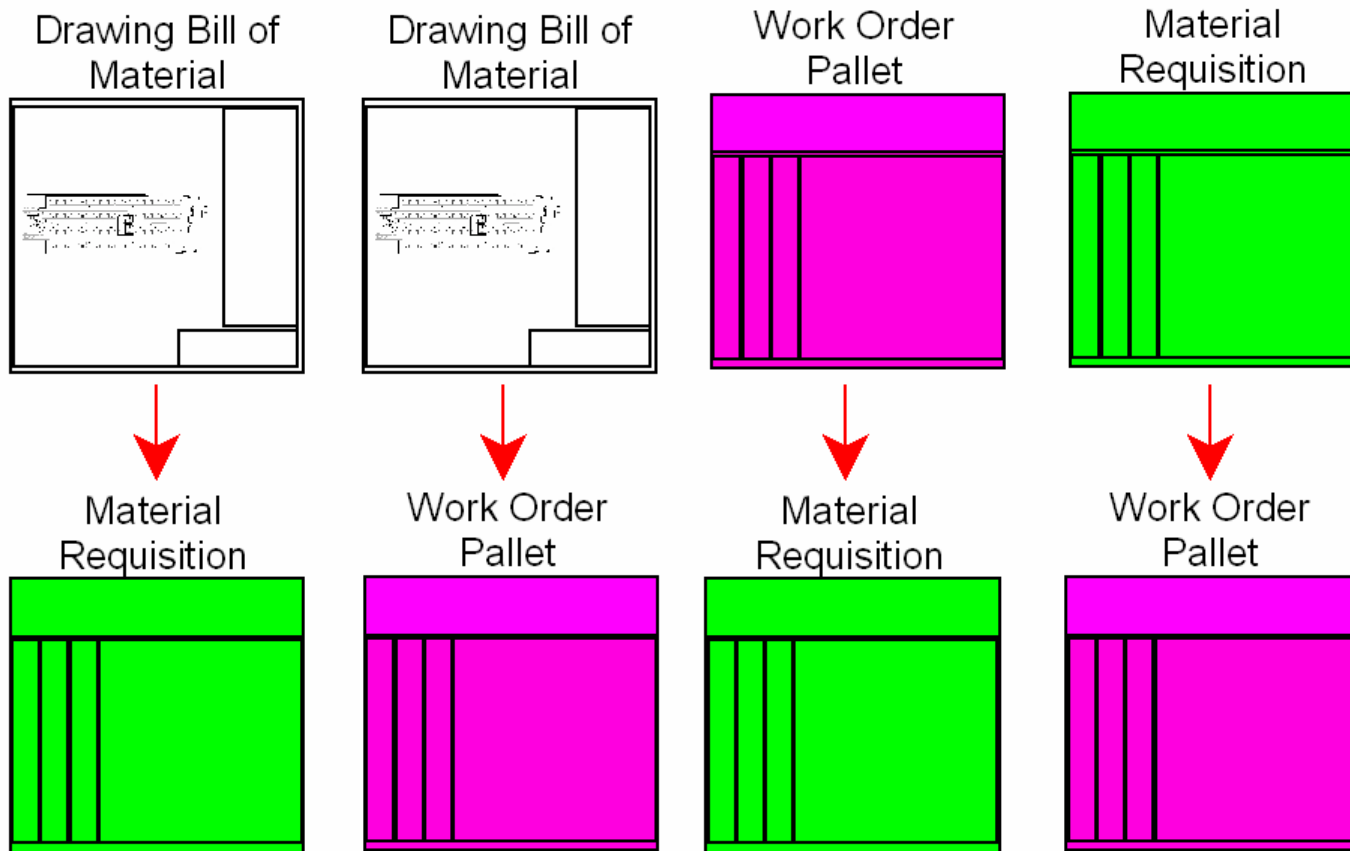
There is a natural relationship between the various types of material control documents.

Typically, the relationship is dictated by the time sequence of the different processes involved in the planning, purchasing and controlling material transactions.

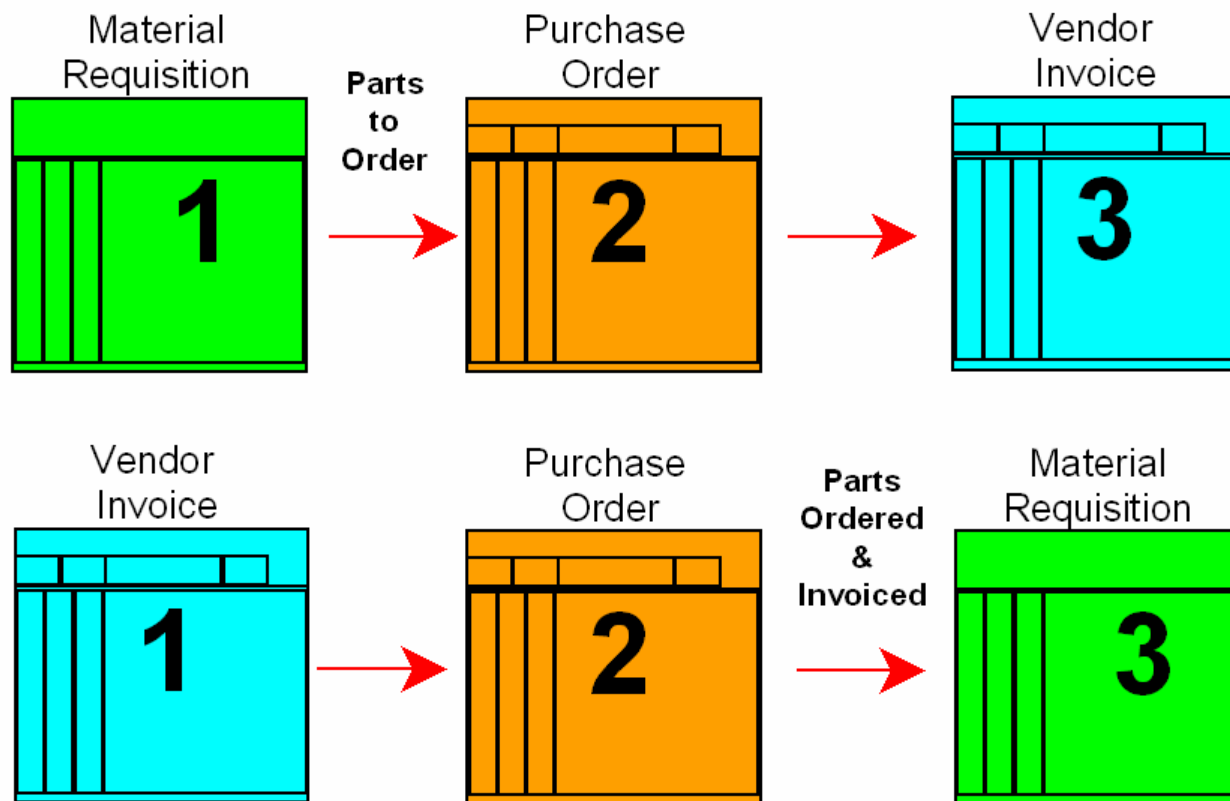
“Typical” flow of purchased material requirements information:



With *PERCEPTION*, different documents can be used to create other documents, all depending on specific needs of a project.



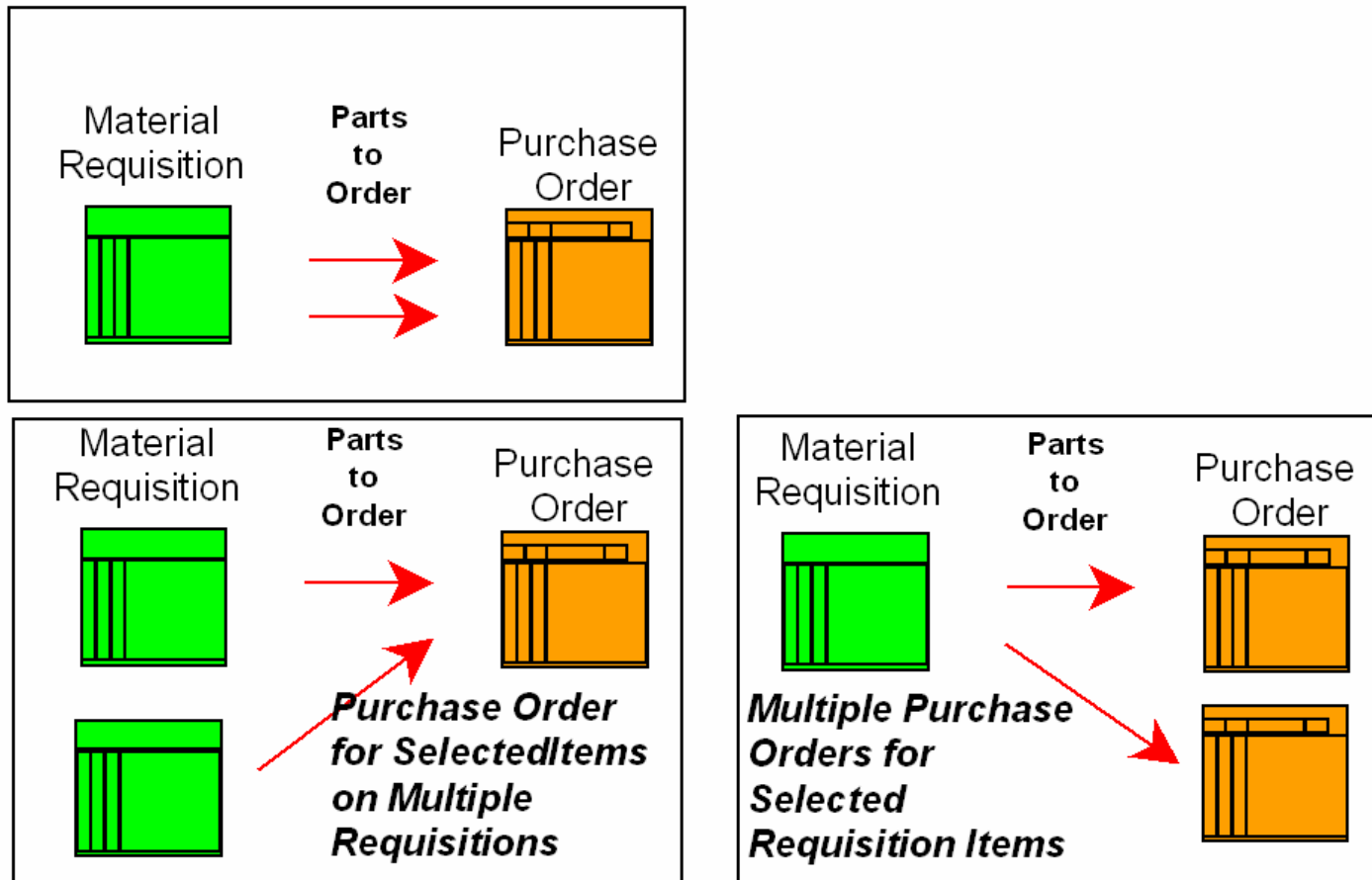
Even vendor invoices can create purchase orders and supporting requisitions.



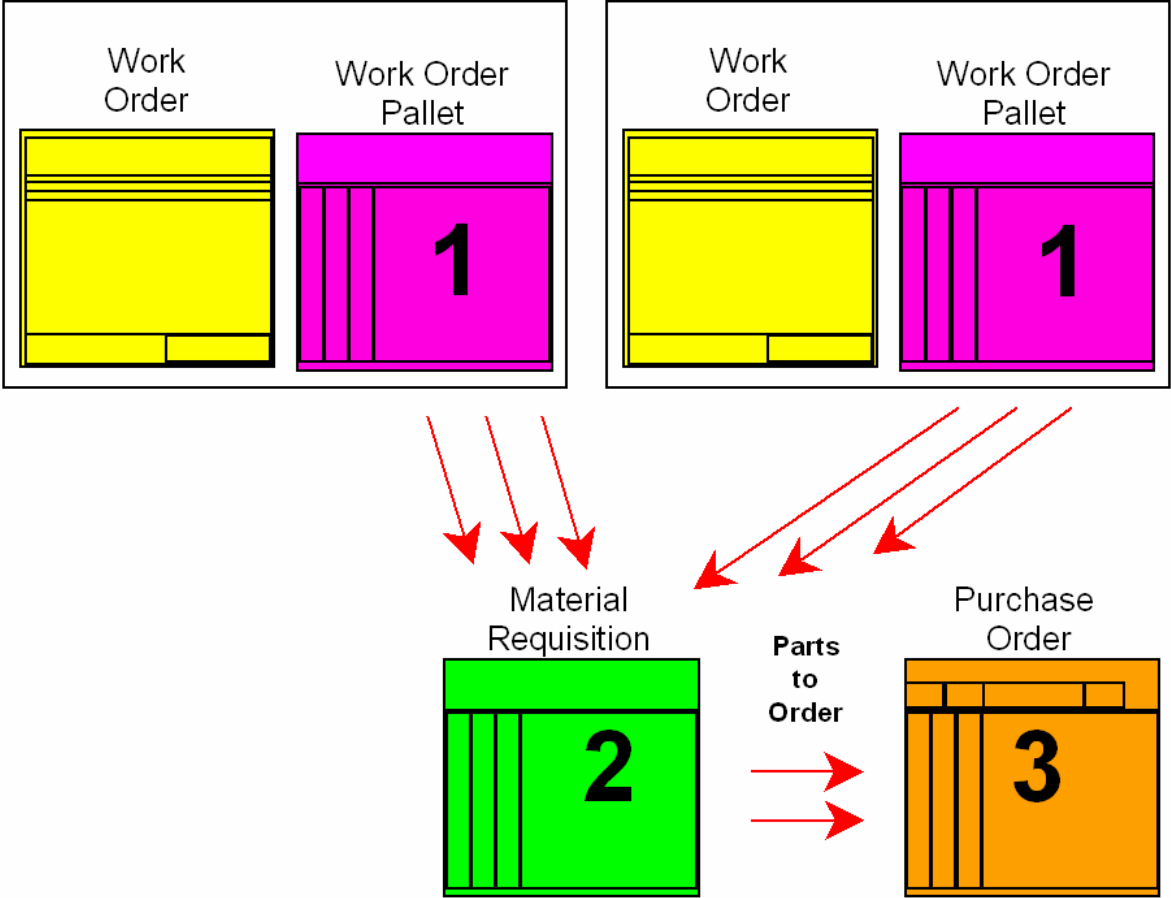
Documents Can Be Supported By Multiple Related Documents

PERCEPTION offers flexibility for generating material control documents that relate to more than one supporting document.

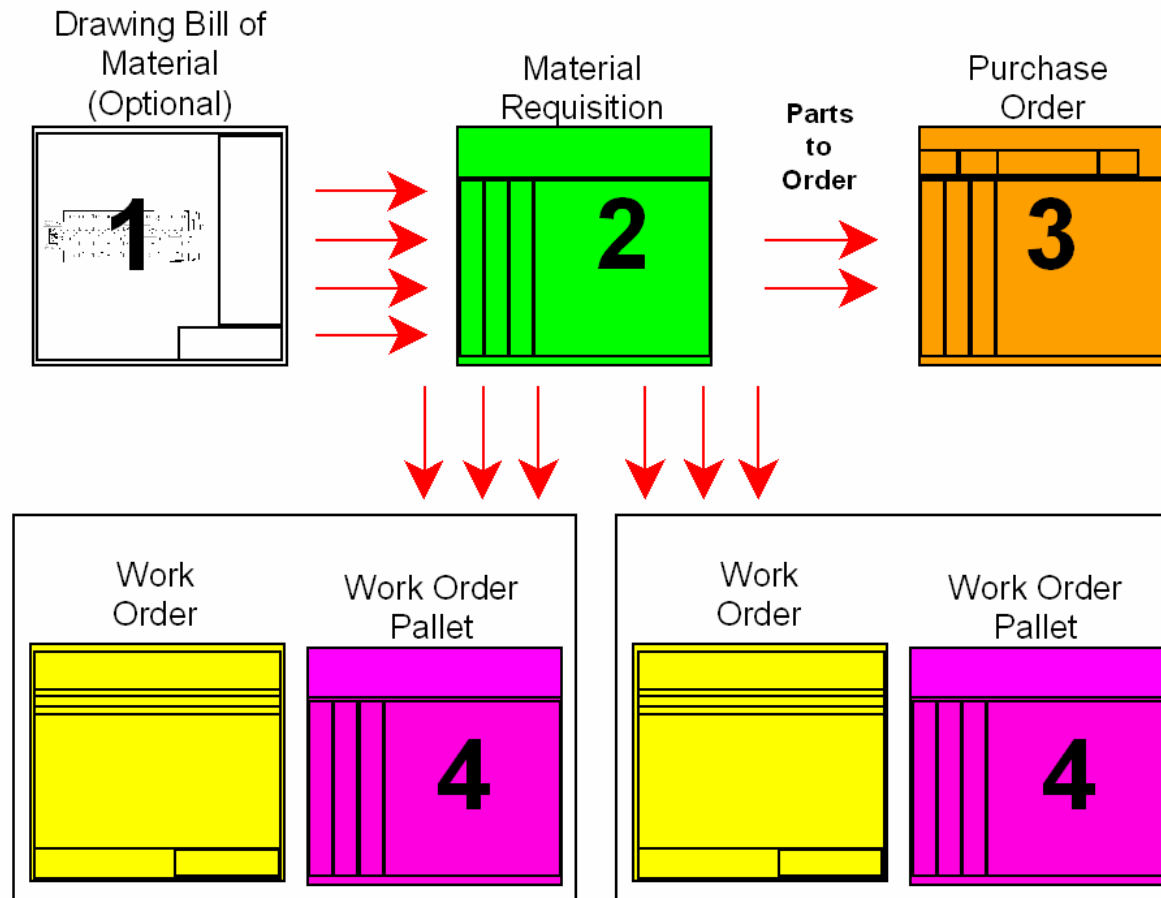
Flexible purchasing options:



Items from multiple work order pallets can be collected to create a requisition:



Or, a requisition can be used to create pallet items across different work orders:

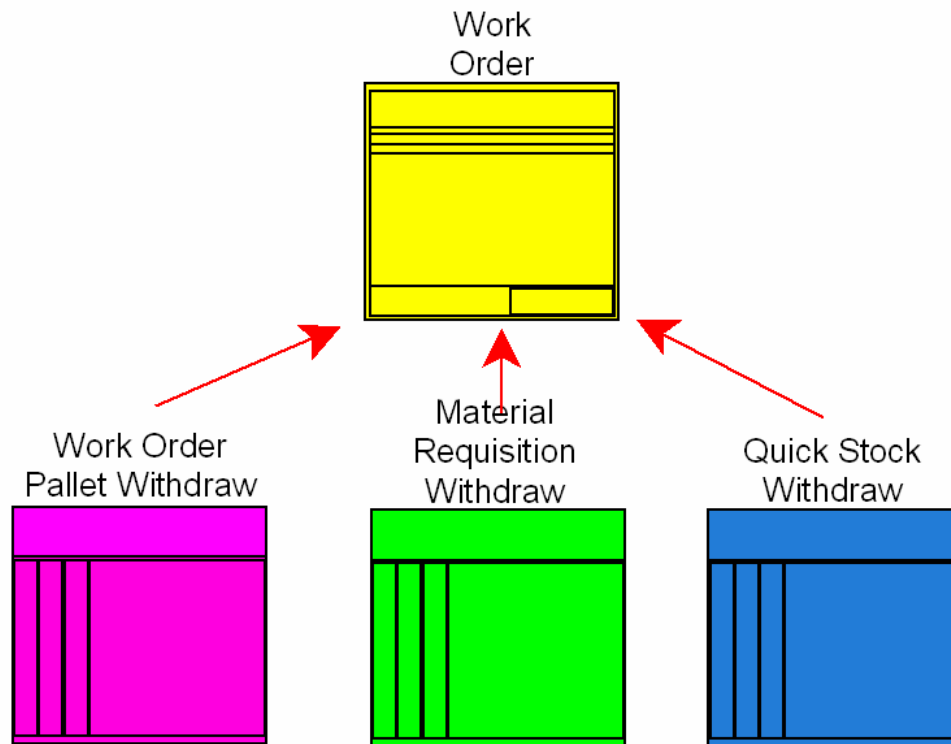


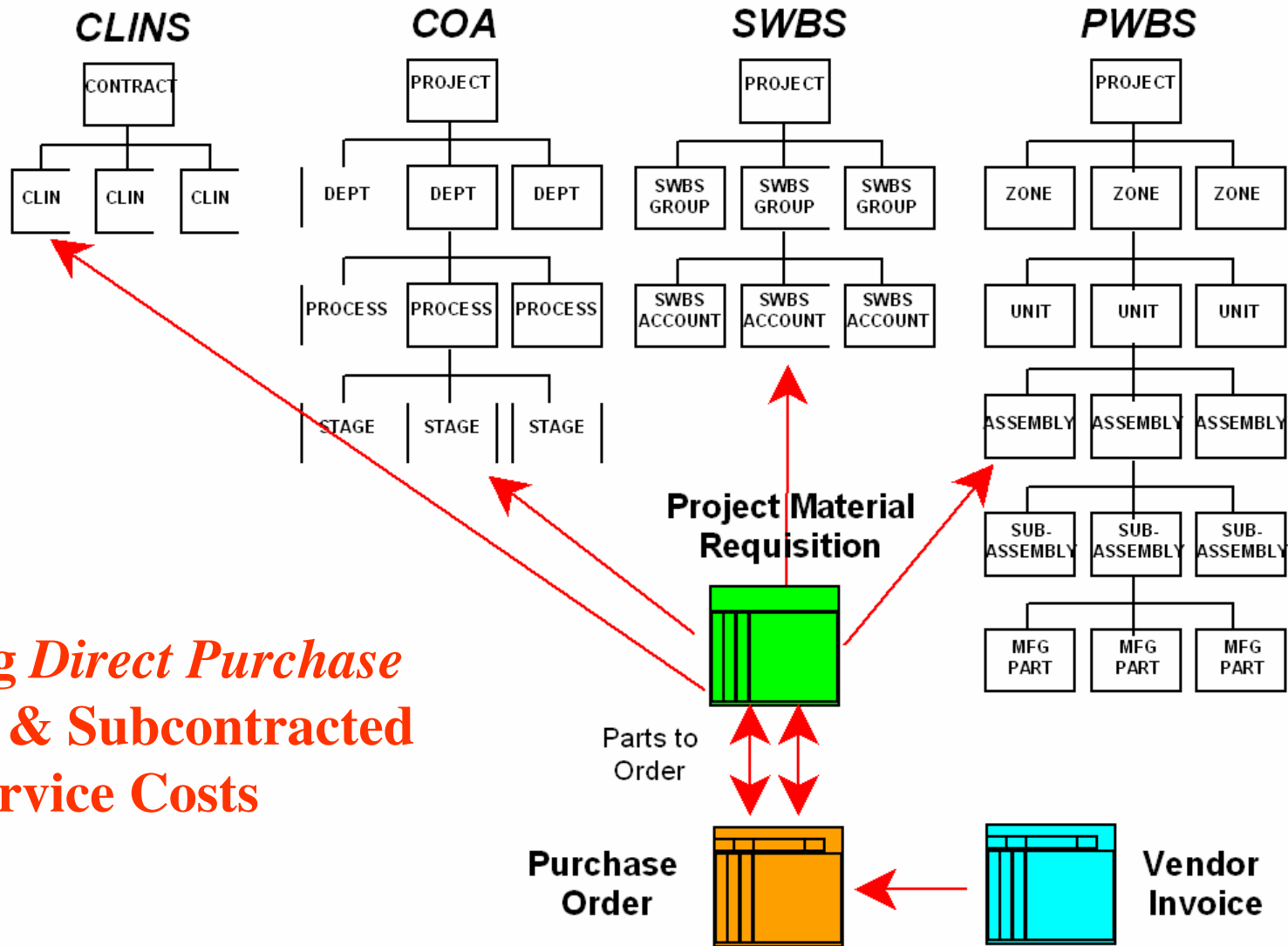
Project Material Cost Management

All detail project material costs, both direct purchase and general stock inventory, are stored with requisition items.

The requisition items are cataloged by the project WBS so that *PERCEPTION* can summarize costs for every level of the project WBS.

Work orders can be issued material from three possible sources: Material Requisition, Work Order Pallet, and/or A Quick Stock Withdraw.





Tracking *Direct Purchase* Material & Subcontracted Service Costs

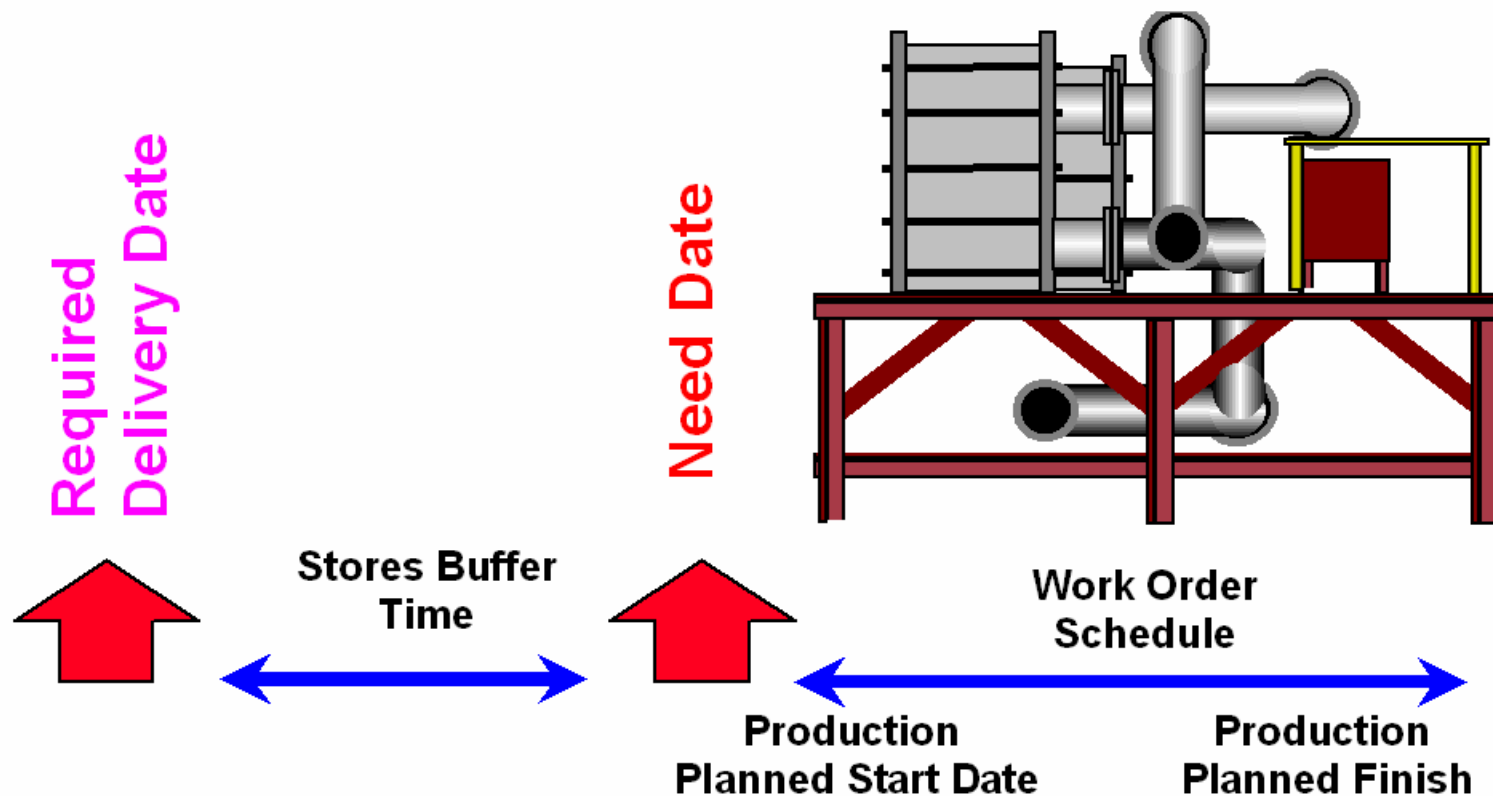
When the preceding database files have been set up, then production use of the system may begin.

Scheduling Material Requirements

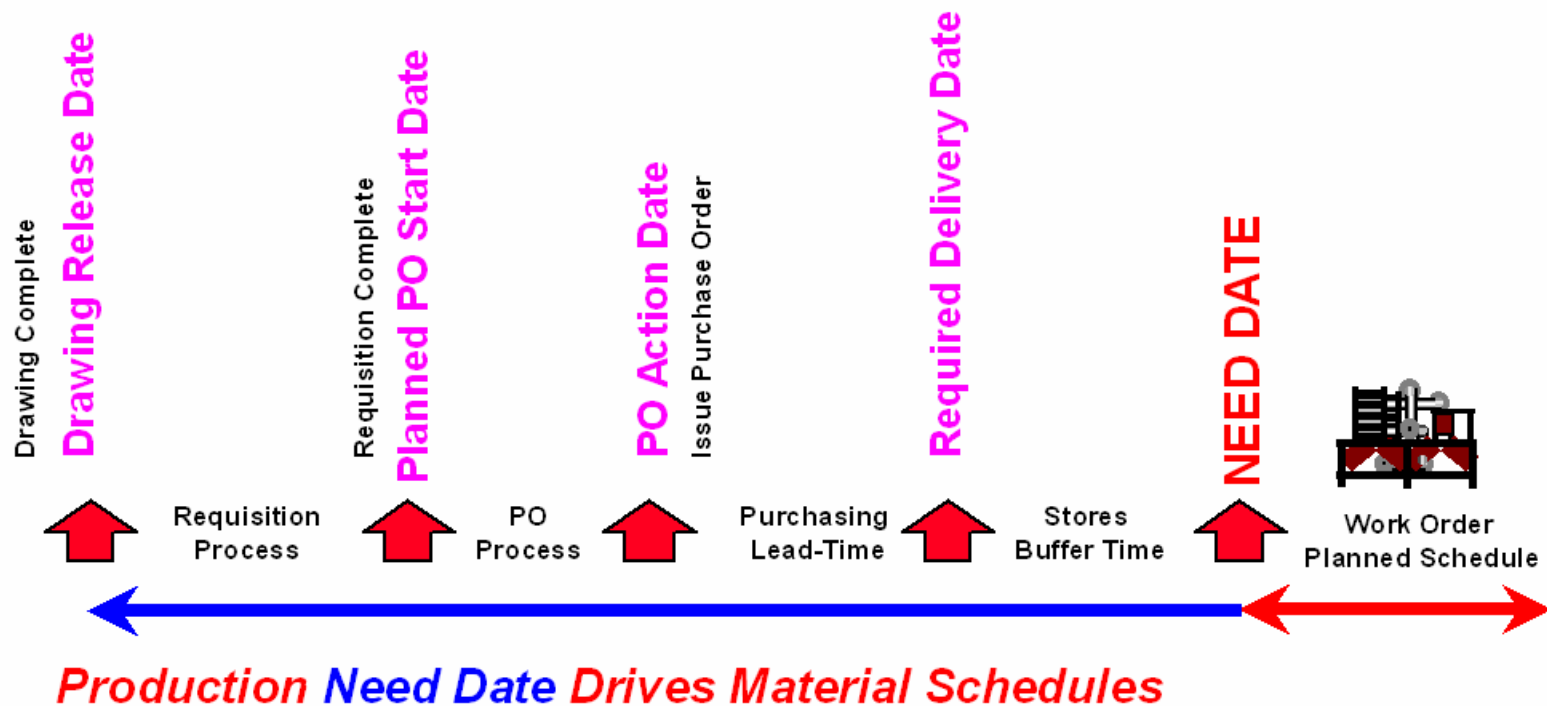
Material Requirements can be scheduled via their Need Dates using either:

- Work Order Start Dates, or
- Work Order Pallet Dates

Material deliveries must be scheduled to meet Required Delivery Dates



PERCEPTION can schedule and track various stages of material schedules.



***PERCEPTION* tracks various stages of material schedules:**

- 1. Drawing Release Date (Drawing Complete)**
- 2. Planned Purchase Order Start Date (Create of Requisition Complete)**
- 3. Purchase Order Action Date (Purchase Order Issued to Vendor)**
- 4. Required Delivery Date**
- 5. Material Need Date**

Between each of these material stage schedules are time periods required to process material information:

- 1. Requisition Process**
- 2. Purchase Order Process (Formulation & Negotiation) Time**
- 3. Purchase Lead-Time (Vendor Process Time)**
- 4. Stores Buffer Time (Receiving, Storage & Process for Production)**

Material Process Times can be defined individually, requisition by requisition, or by using process time standards defined under *Library/Company Parameters* on the main menu.

The screenshot shows a software window titled "System Parameters and Company Defaults" with several tabs: "Company Information", "Company Defaults", "Steel Setup", "Tax Rates", "Set COA Names", and "Accounting". The "Company Defaults" tab is active. On the left, a box titled "Default Number of Days (Process Times)" contains the following settings:

- Req Delay: To Create and Approve a Req from a Released Drawing: 0
- PO Process Time: To Negotiate and Issue a Purchase Order from a Req: 5
- PO Lead Time: From Purchase to Receipt: 14
- Buffer Days: To Receive, Process and Store Material: 13
- Pallet Delay: To Pick and Issue Material: 4

Below this box, the "Email Domain Name" is set to "sparusa.co". A red arrow points to this field. To the right of the process times box, the "Automatic Scheduling Options" section includes:

- Schedule Requisitions From Pallets/WOs/Activities?: No
- Schedule Quick POs From Requisitions?: No
- Schedule All Other POs From Requisitions?: No

Other settings in the window include:

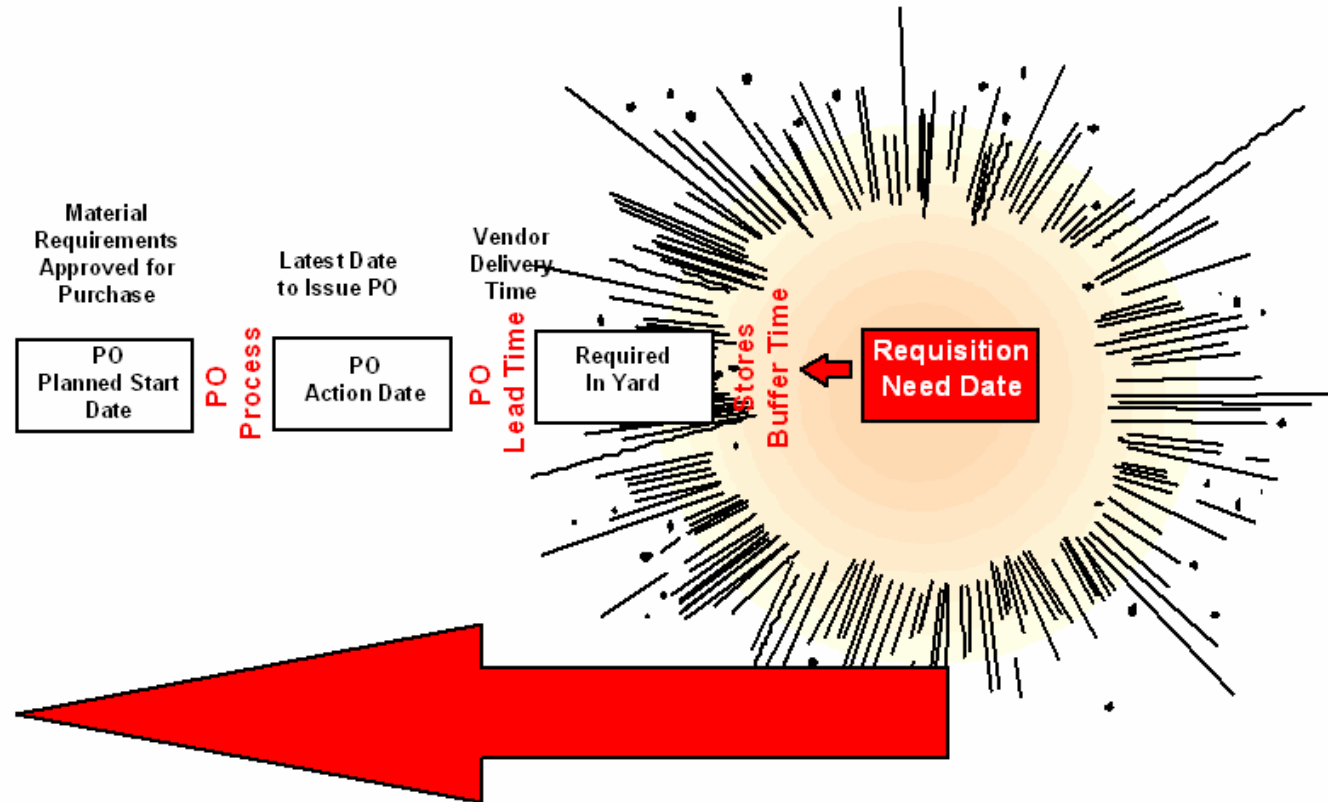
- Company Defaults: Currency (US \$), Stock Cost Method (Standard Price)
- Report Header: Chesapeake Marine Industries
- Report Footer: Company Confidential Information
- PDF Distiller: (empty field)
- Default Storage Location: SPARHOLDER

Buttons for "Save", "Close", and "Help" are located at the bottom right of the window.

**Using schedule templates,
PERCEPTION can back-flow
material schedules from Need
Dates.**

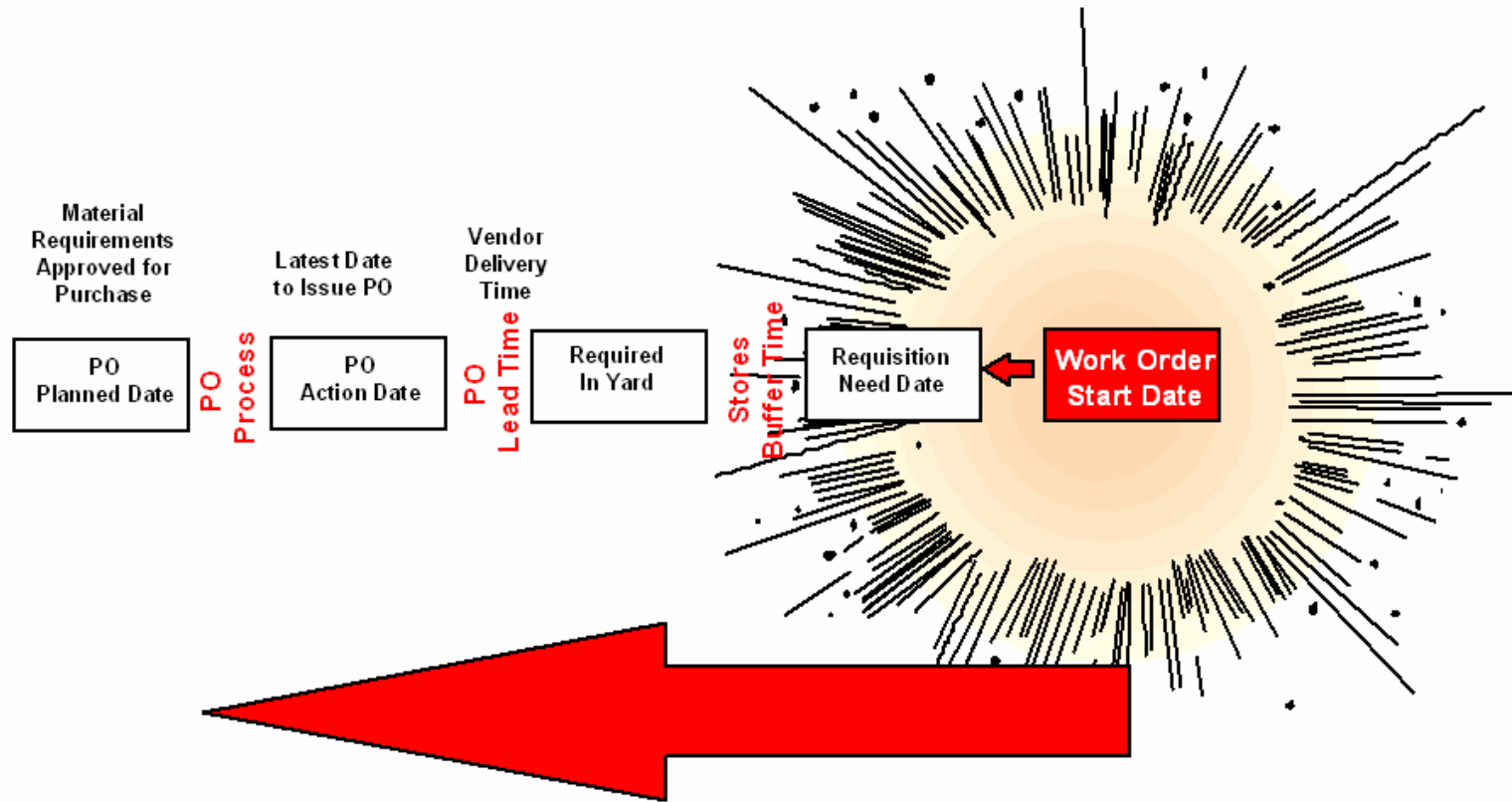
Flow Back of Purchasing Schedules From

User (Manual) Need Date



Back Scheduling From Production Dates

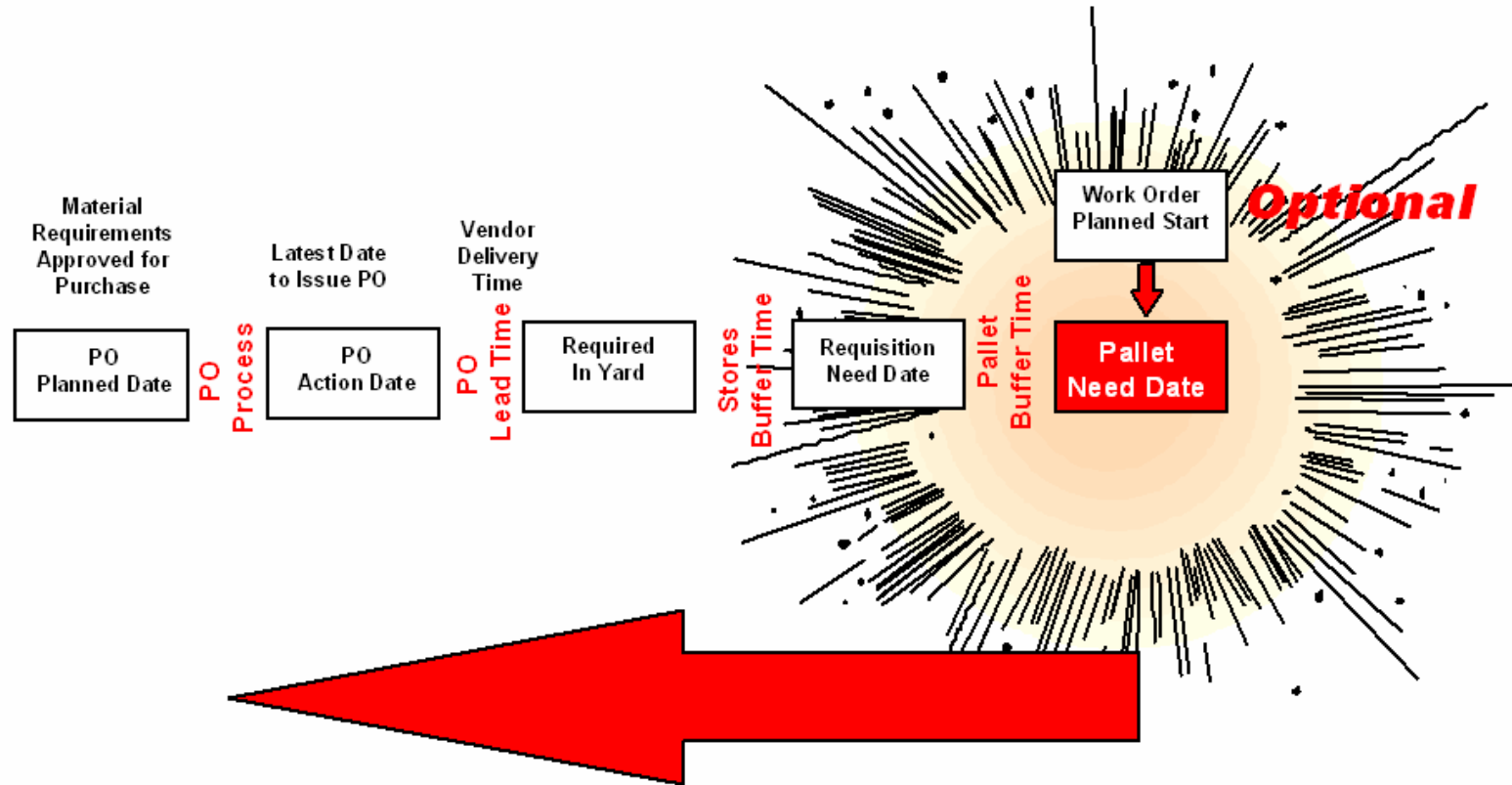
Flow Back of Purchasing Schedules From **Work Order Start Date**



Back Scheduling From Production Dates

Flow Back of Purchasing Schedules From

Pallet Need Date



Back Scheduling From Production Dates

- 1. Schedules can be developed manually with user-entered information,**
- 2. or automatically via project Planning Activities.**

Revising Material Requisition Schedules

PERCEPTION schedules for material requirements can be revised using several different methods:


1. Manually rescheduling requisition Need Dates
2. Manually rescheduling requisitions using the global rescheduling tool
3. Rescheduling work orders attached to the requisitions
4. Rescheduling planning activities attached to the requisitions

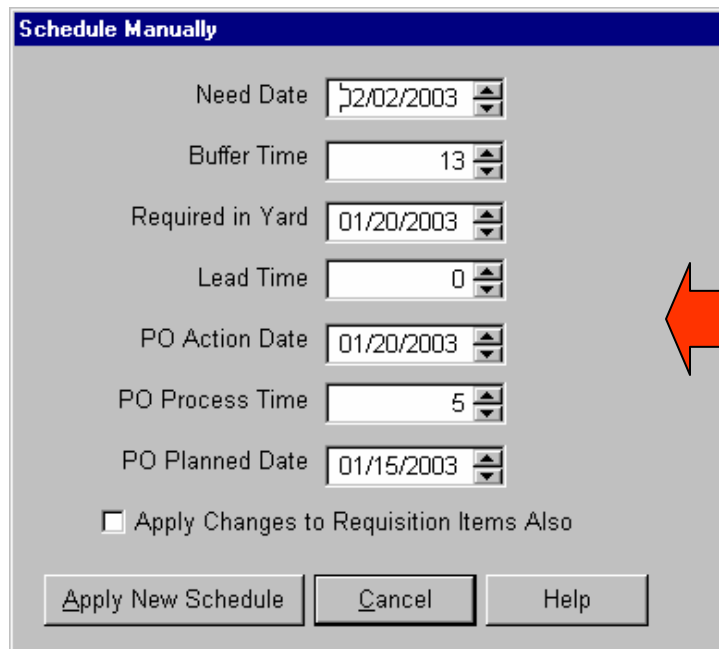
Manually Revising Material Requisition Schedules

The most direct method to revise requisition & purchasing schedules is simply to modify them manually, requisition by requisition.

Rescheduling Material Requisitions Using Global Rescheduling Functions

The global rescheduling features enable the user to re-define Need Dates and the various sequencing times for purchasing.

1. Click on *Environment/Material Control/Requisitions*
2. Retrieve and highlight those requisitions that need to be globally rescheduled
3. Click on the *Reschedule Requisitions* button  on the toolbar.
4. The Schedule Manually window will open
5. Make the adjustments to the rescheduling information
6. Click on the *Apply New Schedule* button.



Schedule Manually

Need Date 02/02/2003

Buffer Time 13

Required in Yard 01/20/2003

Lead Time 0

PO Action Date 01/20/2003

PO Process Time 5

PO Planned Date 01/15/2003

Apply Changes to Requisition Items Also

Apply New Schedule Cancel Help

Manually Revising Material Requisition Item Schedules

The procedure described for revising requisitions applies to all related requisition items.

However, if requisition items require different sets of schedules, the rescheduling procedure is also available at the requisition item level of detail.

Automated Rescheduling Of Material Requisitions

The Need Date on requisition items can be set manually or set/reset automatically by association with a pallet, work order, or planning activity.

The following outlines these automated scheduling effects for requisition item Need Date:

- **If scheduled by a Pallet:**

Requisition Item Need Date = Pallet Need Date – Pallet Buffer Time

- **If scheduled by a Work Order:**

Requisition Item Need Date = Work Order Planned Start Date

- **If scheduled by a Planning Activity:**

Requisition Item Need Date = Activity Planned Start Date

The priority order for determining the requisition item Need Date is as follows:

- 1. Pallet Need Date always takes first precedence**
- 2. Work Order Planned Start Date takes second precedence**
- 3. Planning Activity Planned Start Date takes third precedence.**

If the item is scheduled by association with a pallet, work order, or planning activity, the Need Date does not get modified on that item.

To reschedule the item, the user must change the date on the attached document that schedules the item.

Any change to the Need Date, either manual or automatic, will cause a recalculation of the schedule and all other dates that are dependent upon that date (for example, Required In Yard Date, PO Date, etc.).

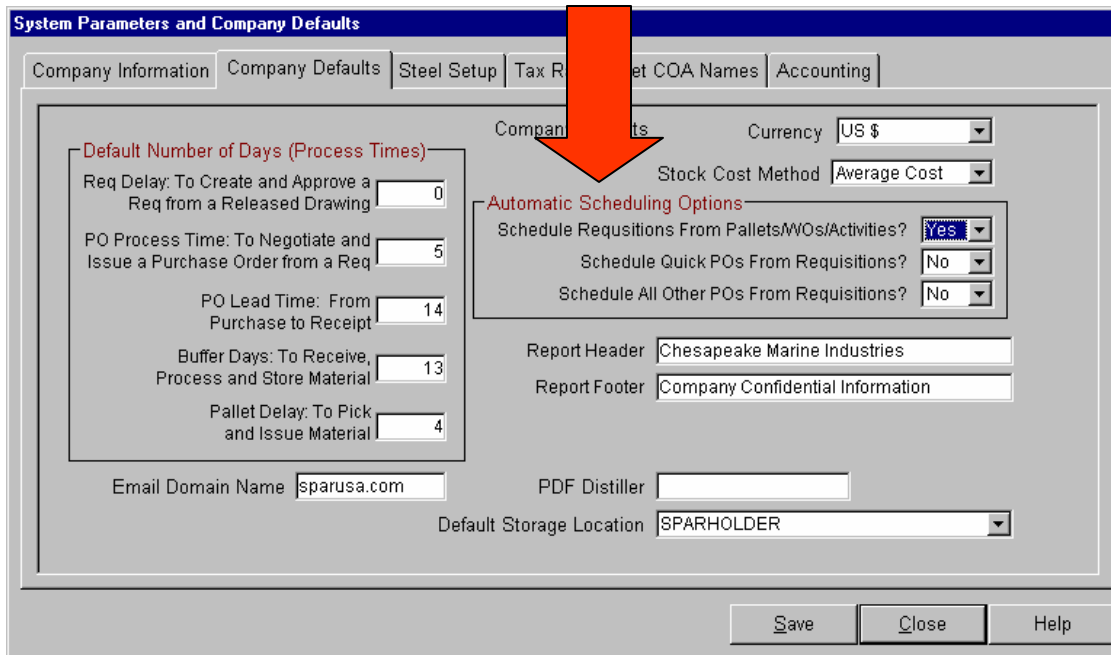
NOTE: A requisition item may be associated with a work order or planning activity that has not yet been defined in the system.

In this case, the item will *not* be scheduled by the non-existent work order or activity until that work order or activity is defined and given a Planned Start Date.

The requisition item Need Date will then be updated automatically.

Whenever the planning activities, work orders or pallets are rescheduled, the system may be authorized to automatically reschedule requisitions attached to these documents.

This authorization can be prescribed on the company parameters and defaults (*Library/Company Parameters/Defaults* tab. See the options provided in the *Automatic Scheduling Options* section.



The screenshot shows a software window titled "System Parameters and Company Defaults" with several tabs: "Company Information", "Company Defaults", "Steel Setup", "Tax R...", "et COA Names", and "Accounting". The "Company Defaults" tab is active. The window is divided into several sections:

- Default Number of Days (Process Times):** Includes input fields for "Req Delay: To Create and Approve a Req from a Released Drawing" (0), "PO Process Time: To Negotiate and Issue a Purchase Order from a Req" (5), "PO Lead Time: From Purchase to Receipt" (14), "Buffer Days: To Receive, Process and Store Material" (13), and "Pallet Delay: To Pick and Issue Material" (4).
- Automatic Scheduling Options:** Includes three dropdown menus: "Schedule Requisitions From Pallets/WOs/Activities?" (Yes), "Schedule Quick POs From Requisitions?" (No), and "Schedule All Other POs From Requisitions?" (No).
- Report Header:** Chesapeake Marine Industries
- Report Footer:** Company Confidential Information
- Email Domain Name:** sparusa.com
- PDF Distiller:** (empty field)
- Default Storage Location:** SPARHOLDER

At the bottom of the window are buttons for "Save", "Close", and "Help". A large red arrow points to the "Automatic Scheduling Options" section.

The user should refer to the SPAR manual titled "*Material Planning, Purchasing & Inventory Control*" and review the scheduling rules described for material functions.