efi PrintStream

User Guide

Combo Work Ticket
V21.1.0200

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EFI PrintStream | *V21.1.0200 Combo Work Ticket User Guide*

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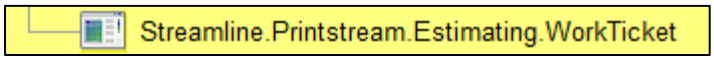
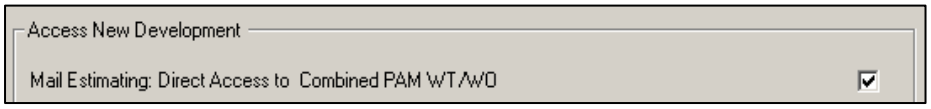
Introduction

Overview

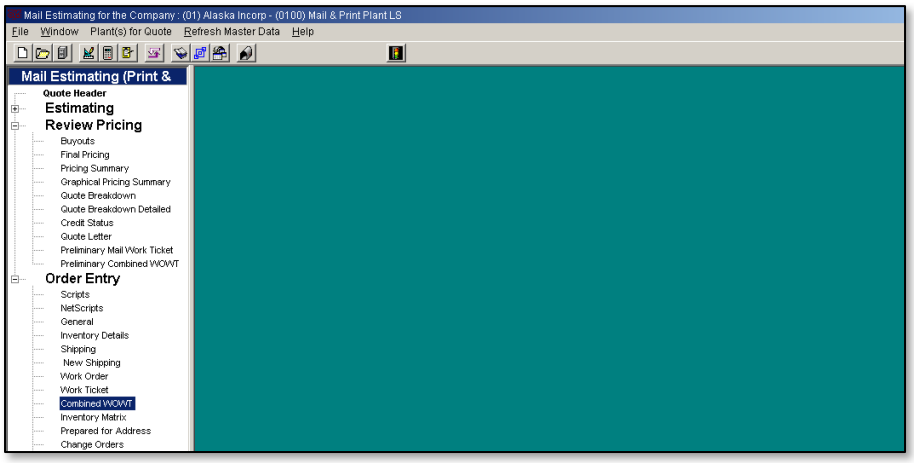
The Combo Work Ticket is both a stand-alone module and can appear within Print and Mail Estimating.



To add it to Print and Mail Estimating, contact your Production Support rep. It is accessed in Master File Reports > System Maintenance > Features to Purchase > Print and Mail Estimating > Mail Estimating: Direct Access to Combined PAM WT/WO.



The Combo Work Ticket appears under the **Order Entry** section of the tree display.



Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

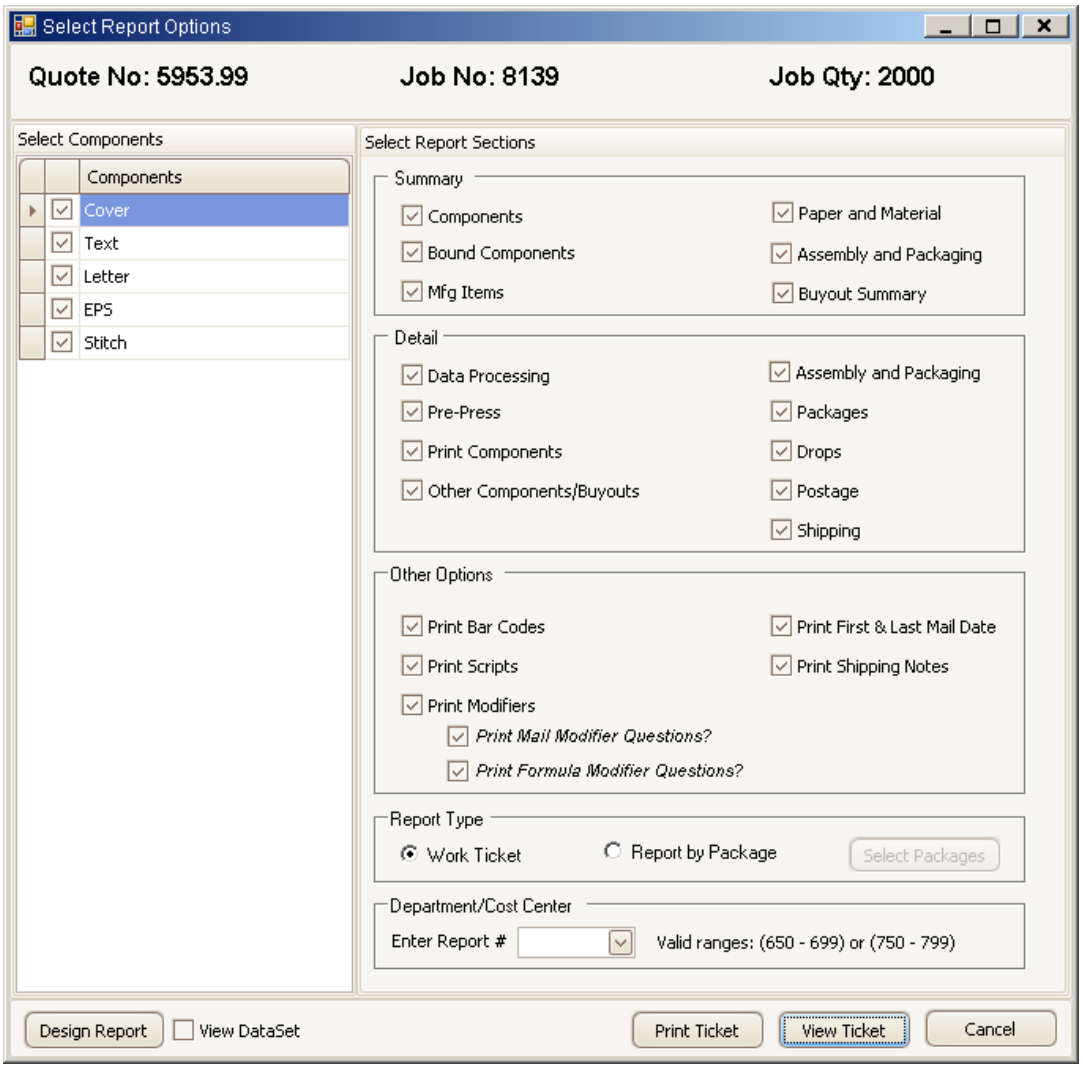
EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

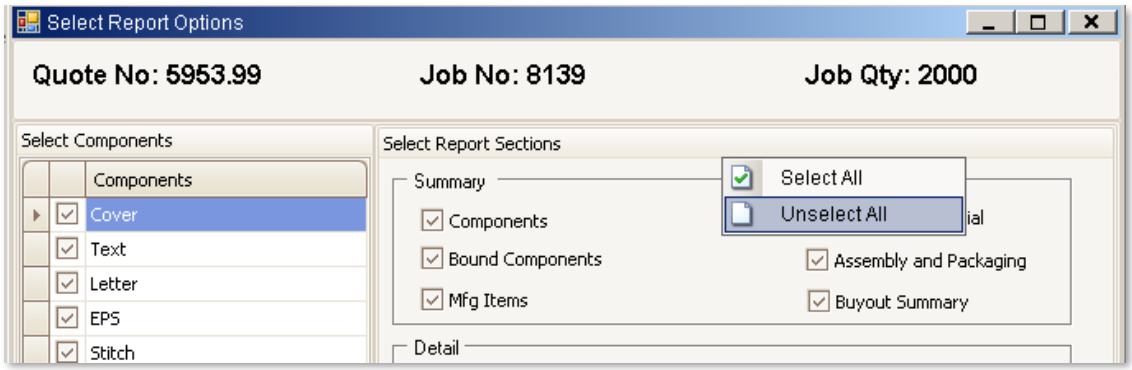
EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Report Options

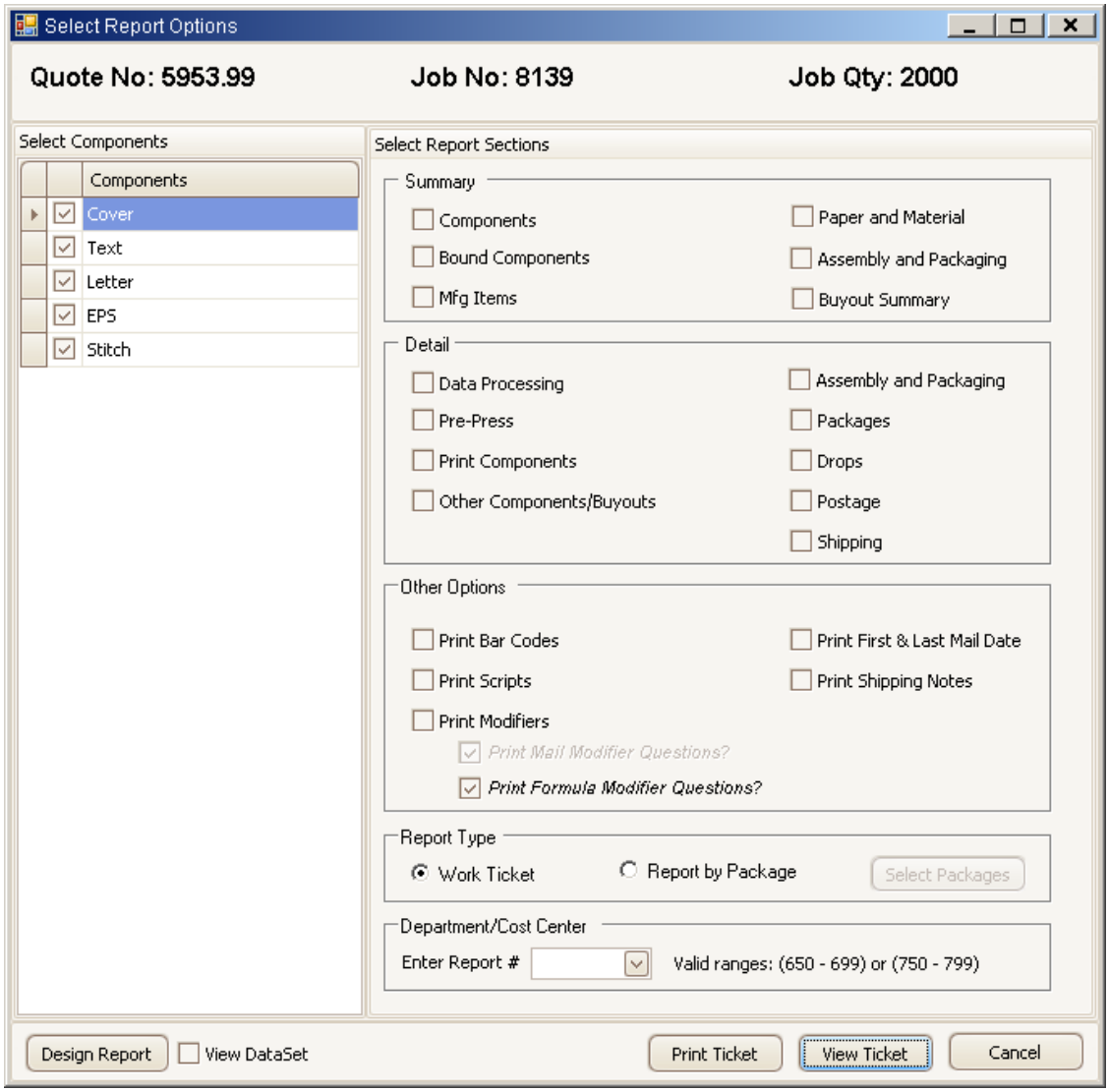
Select Report Options as desired. By default, all components and check boxes are selected.



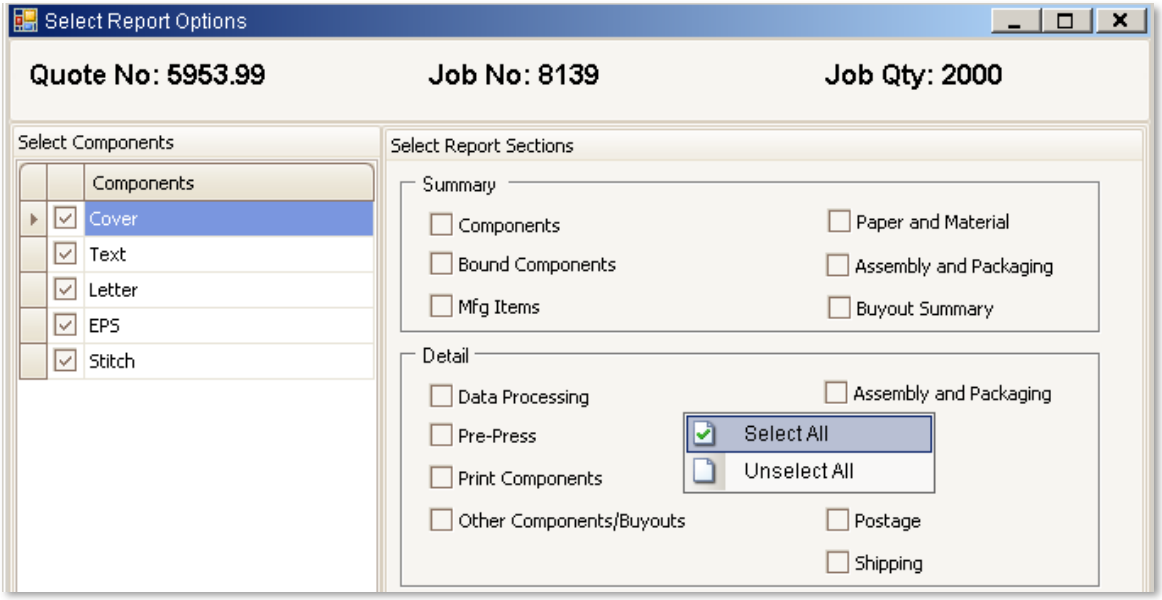
To clear all Report Section options, right-click the **Select Report Sections** bar and select **Unselect All**.



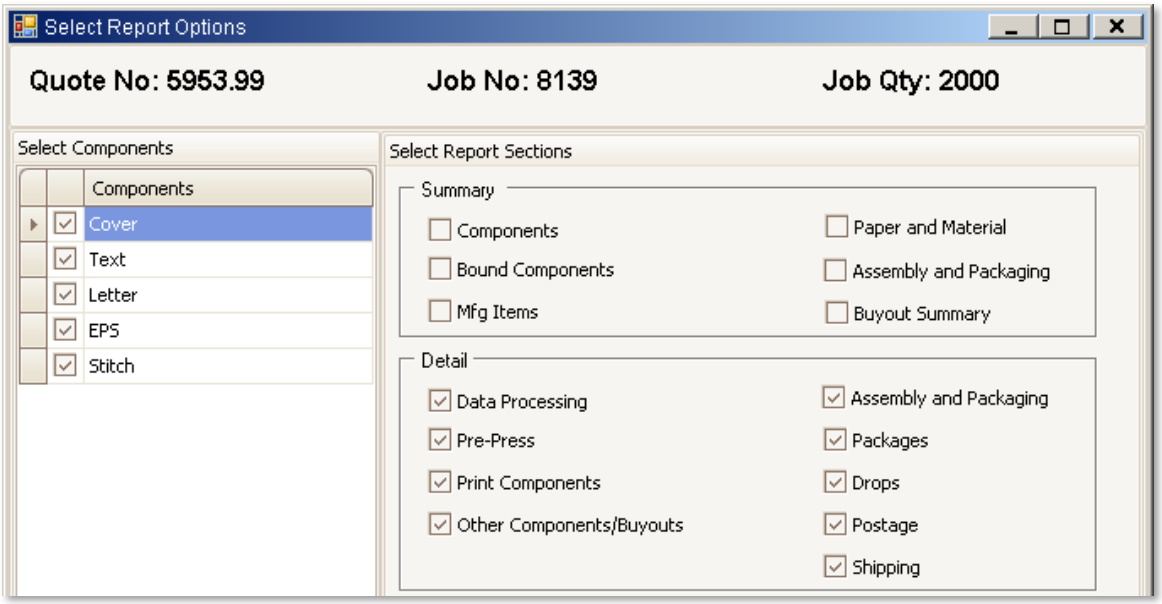
Report Sections are cleared and will not display in the report.



To change a specific report group section such as **Detail**, right-click within the **Detail** area and select **Select/Unselect All**.

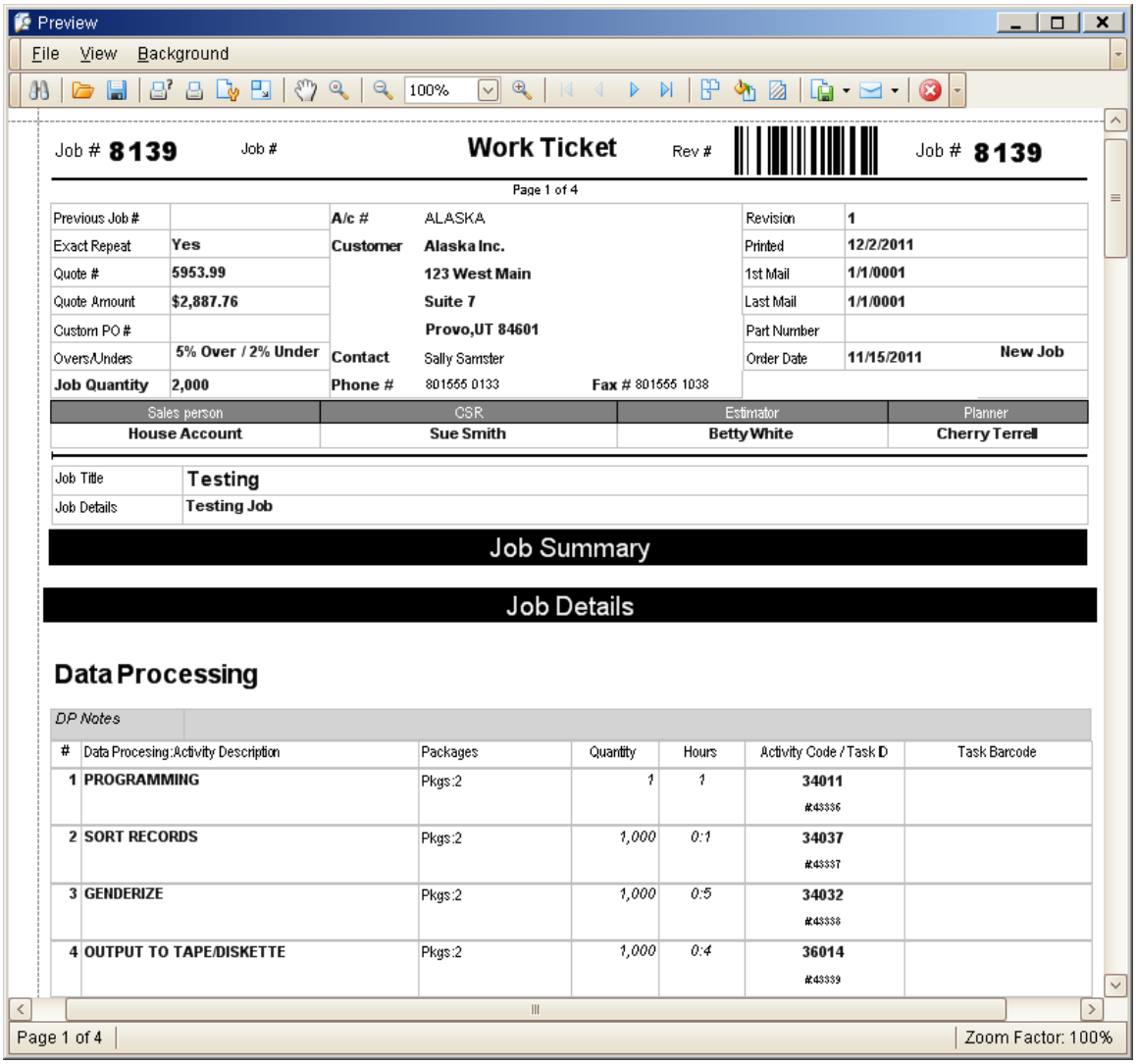


All the check boxes are now selected in the **Detail** area.

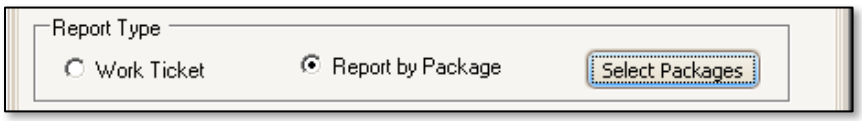


You can do the same for the **Select Components** area and also select/clear individual check boxes.

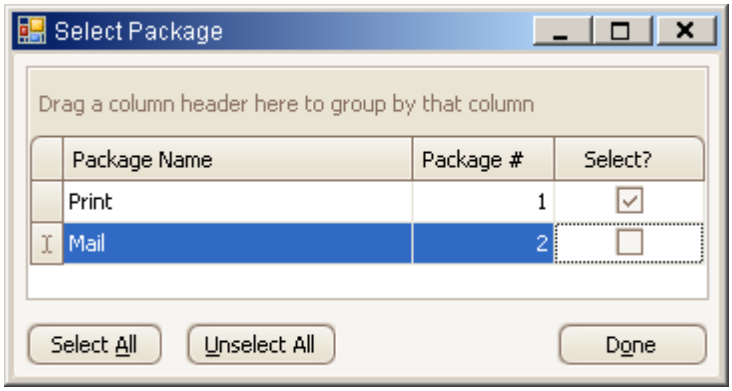
The Combo Work Ticket example below does not display the Job Summary; it does, however, display Job Details.



Report Type - Work Ticket is the usual default and prints a standard Combo Work Ticket. Select **Report by Package** to display a Combo Work Ticket for only the components linked to a specific package.



Click the **Select Packages** button to choose the package(s).



The Combo Work Ticket example below shows only the components that are linked to this package.

Job # **8139** Job # **Work Ticket** Rev # Job # **8139**

Page 1 of 4

Previous Job #		A/c #	ALASKA	Revision	1
Exact Repeat	Yes	Customer	Alaska Inc.	Printed	12/2/2011
Quote #	5953.99		123 West Main	1st Mail	12/1/2011
Quote Amount	$2,887.76		Suite 7	Last Mail	12/1/2011
Custom PO #			Provo,UT 84601	Part Number	
Overs/Unders	5% Over / 2% Under	Contact	Sally Samster	Order Date	11/15/2011 New Job
Job Quantity	2,000	Phone #	801555 0133 Fax # 801555 1038	Package #	1

Sales person	CSR	Estimator	Planner
House Account	Sue Smith	Betty White	Cherry Terrell

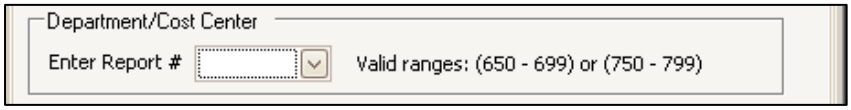
Job Title	Testing
Job Details	Testing Job

Job Summary

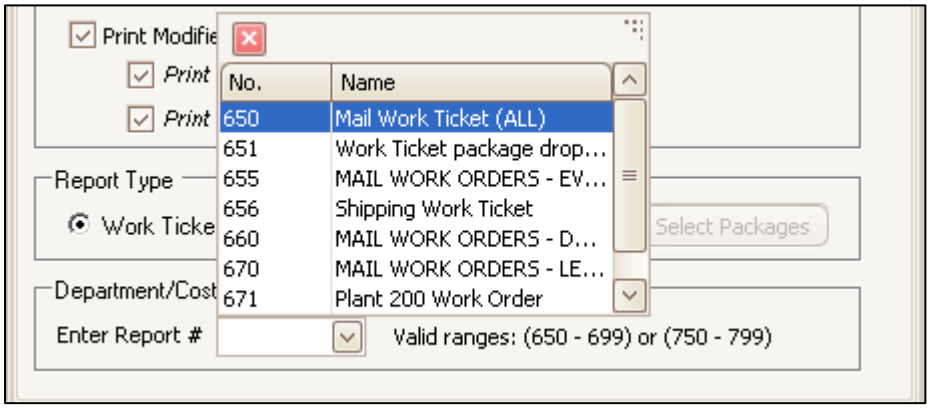
Components

No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment / Insert Notes
1	Cover		1,000	Printed	8.5 x 11	8.5 x 11		
	1 forms x 4 pgs, 4up One side,5/0,-Dylux Proof 01,Blueline Proof,Komori 6 Color/,Final Trim 01							
2	Text		1,000	Printed	8.5 x 11	8.5 x 11		
	1 forms x 16 pgs, 1up Sheetwise,2/2,-Blueline Proof,Film Process-NO UDF,240 Heidelberg,MBO Fold 01							

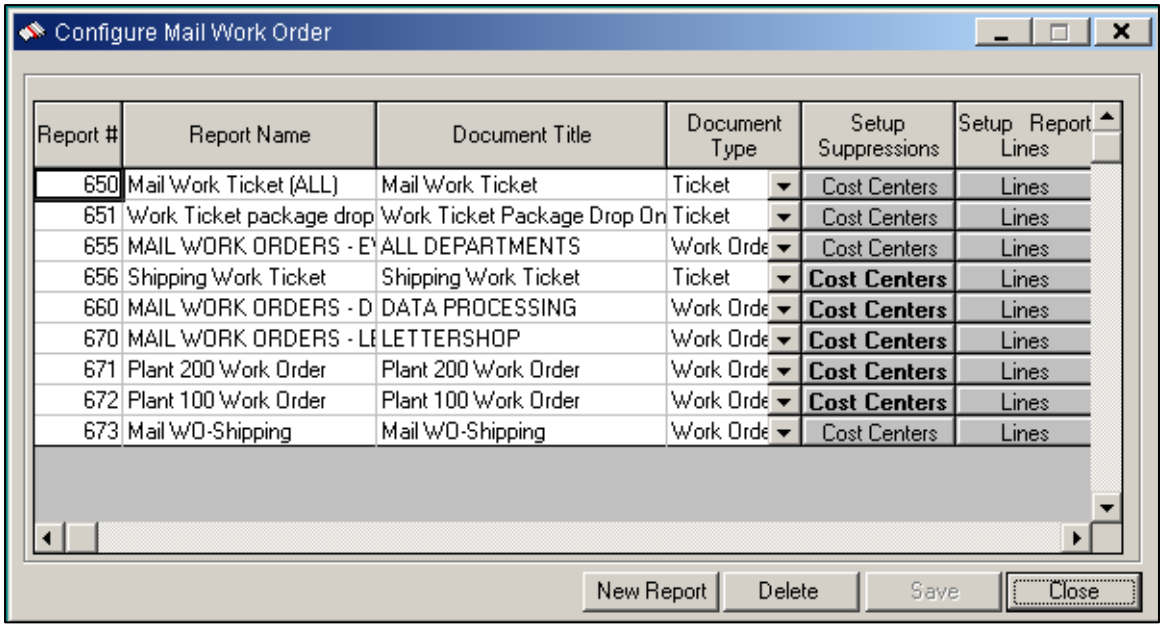
Department/Cost Center Reports



Select the **Mail Work Order/Ticket Report #** from the drop-down list.



These reports are setup in **Master File Mail Process > File > Setup > Configure Mail Work Order**.



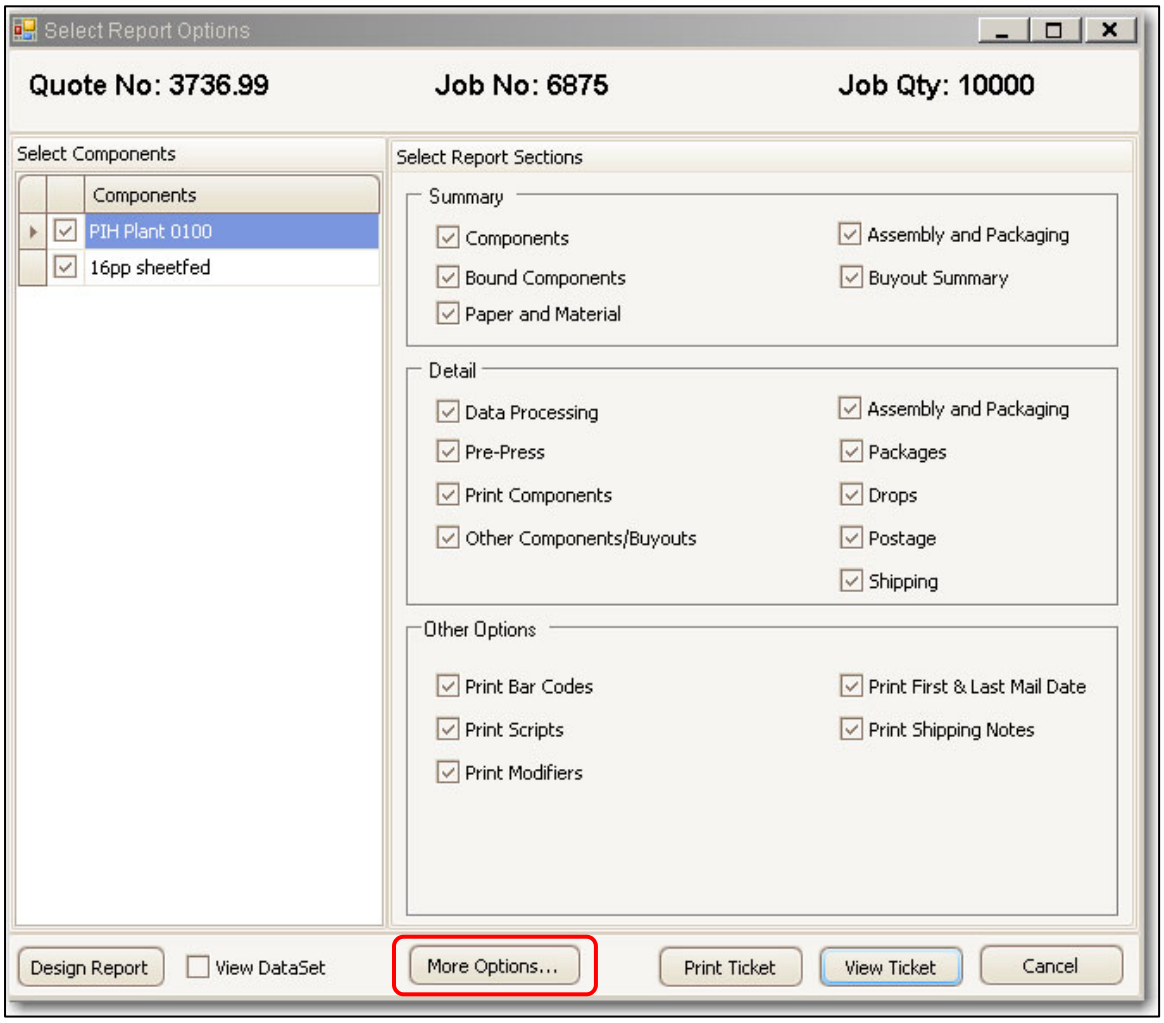
More Options

Provide user the option to select one plant if needed for Multi-Plant jobs.

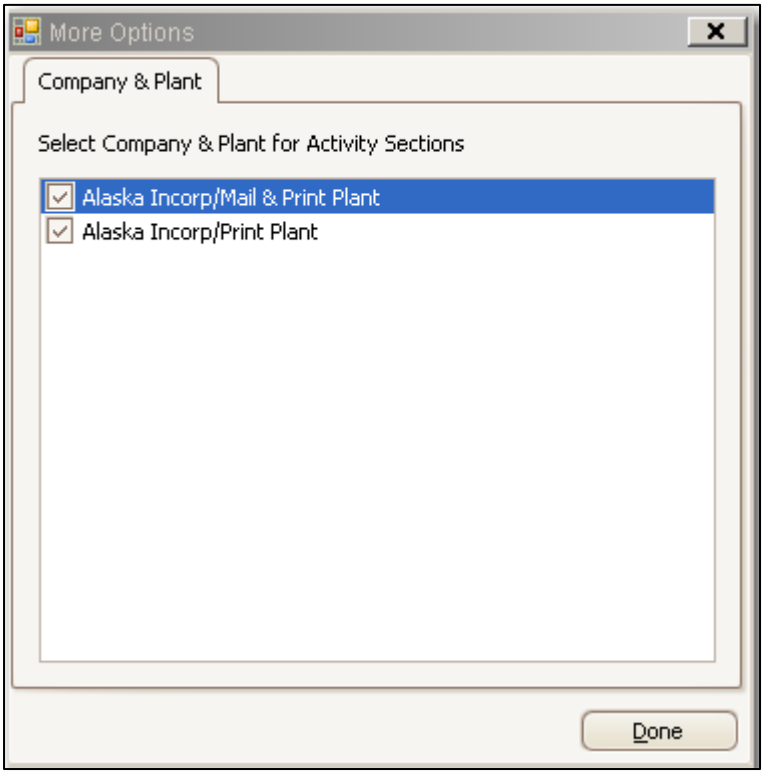
In a Multi-Plant environment, if a job is shared across plants, users will have the ability to select specific plants to generate for the Combo Work Ticket.

An example is job 6875 that is shared in 2 plants.

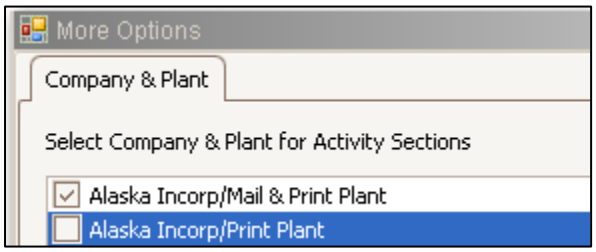
Select the Combo Work Ticket and click **More Options**.



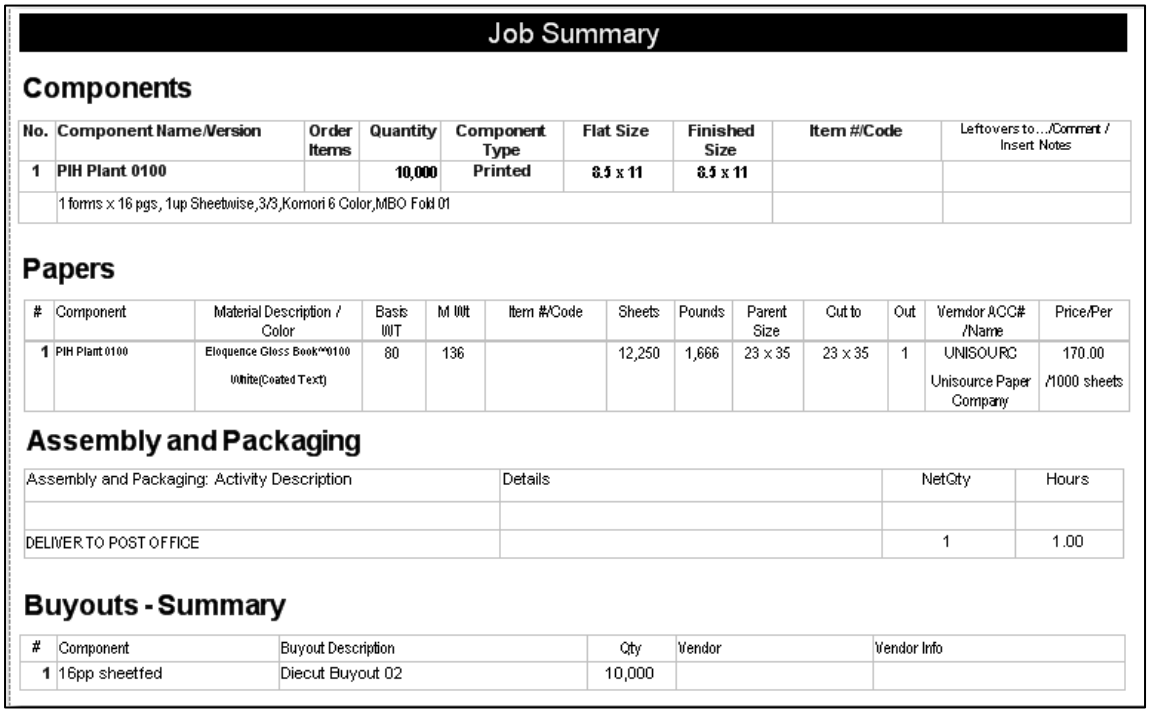
By default, all plants that participate on the job will be selected.



Select the plant you wish to only view processes for on the Combo Work Ticket.



The Summary section of the job ticket will still display items for both plants. You do have the option to turn off the summary if you do not wish to see them.



Job Summary

Components

No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment / Insert Notes
1	PIH Plant 0100		10,000	Printed	8.5 x 11	8.5 x 11		
	1 forms x 16 pgs, 1up Sheetwise,3/3,Komori 6 Color,MBO Fold 01							

Papers

#	Component	Material Description / Color	Basis Wt	M Wt	Item #/Code	Sheets	Pounds	Parent Size	Cut to	Out	Vendor ACC# /Name	Price/Per
1	PIH Plant 0100	Eloquence Gloss Book**0100 White(Coated Text)	80	136		12,250	1,666	23 x 35	23 x 35	1	UNISOURC Unisource Paper Company	170.00 /1000 sheets

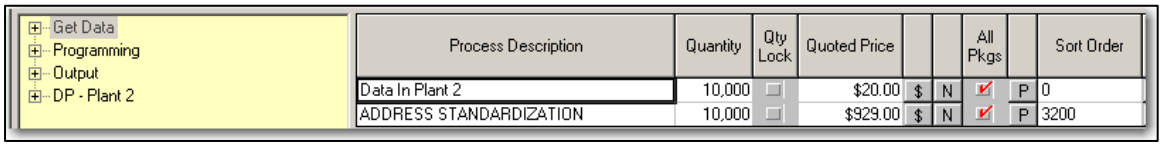
Assembly and Packaging

Assembly and Packaging: Activity Description	Details	NetQty	Hours
DELIVER TO POST OFFICE		1	1.00

Buyouts - Summary

#	Component	Buyout Description	Qty	Vendor	Vendor Info
1	16pp sheetfed	Diecut Buyout 02	10,000		

But processes – mail and print related – will only display for the plant. In this example, there is a DP process for each plant, but only the plant 0100 process displays on the ticket.



- Get Data
- Programming
- Output
- DP - Plant 2

Process Description	Quantity	Qty Lock	Quoted Price			All Pkgs		Sort Order
Data In Plant 2	10,000		$20.00	$	N	☑	P	0
ADDRESS STANDARDIZATION	10,000		$929.00	$	N	☑	P	3200

Job Details

Data Processing

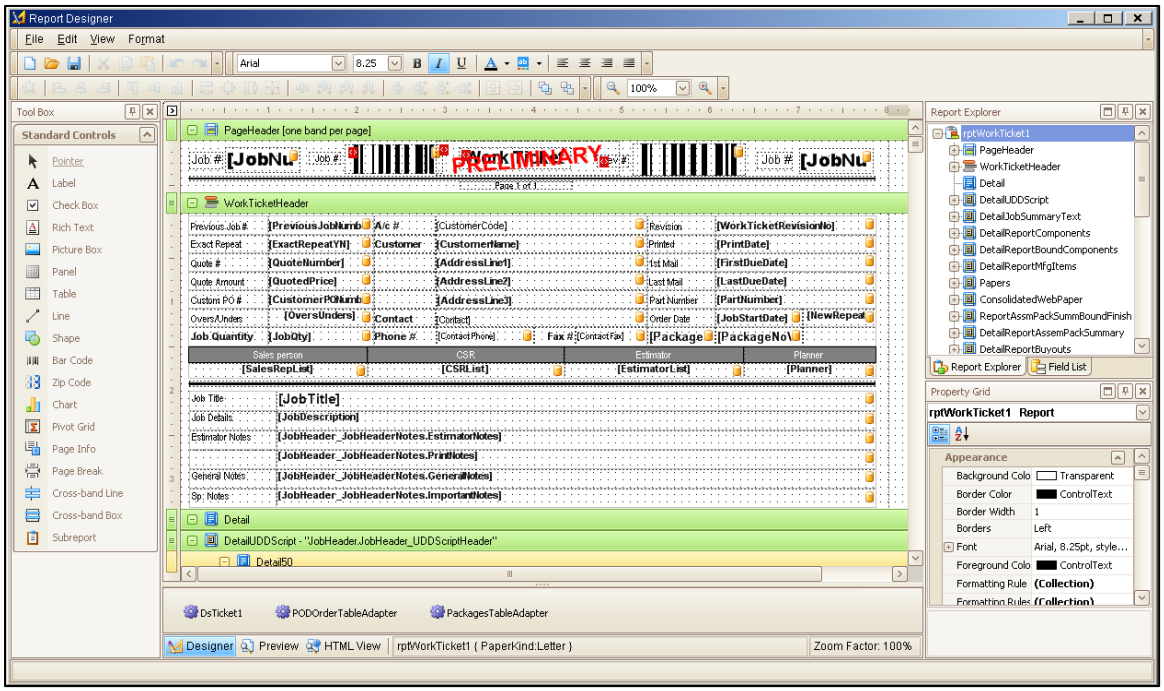
DP Notes

#	Data Procesing:Activity Description	Packages	Quantity	Hours	Activity Code / Task ID	Task Barcode
1	ADDRESS STANDARDIZATION	Pkgs:1	10,000	1.40	34036 #27030	
	Yes					

Design Report

The **Design Report** button opens a report designer feature which enables the user to make modifications to the Combo Work Ticket.

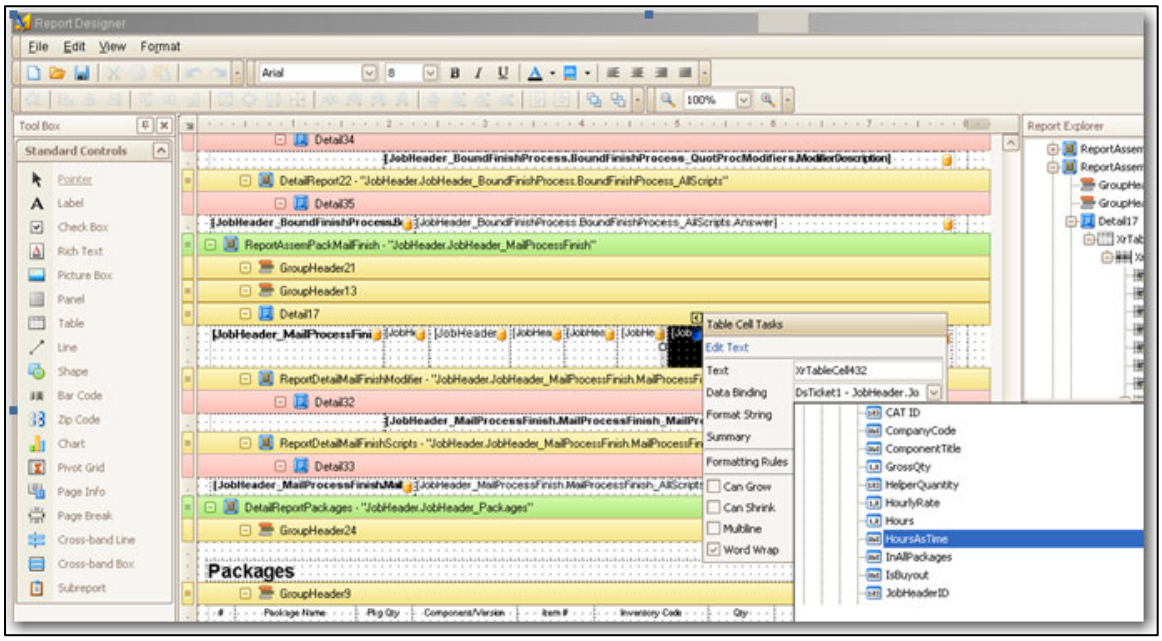
The Report Designer opens as shown below.



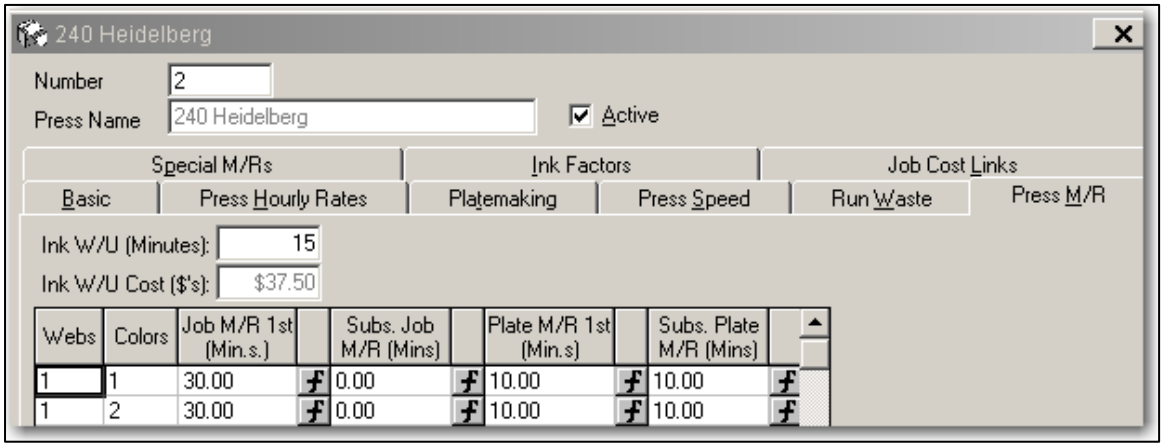
Added Features to the Combo Work Ticket

Display Time in Hours and Minutes Option

Time displayed on the work ticket now displays in Hours and Minutes instead of Hours with Decimal by simply making a change in the Report Designer to select instead of Hours to be HoursAsTime.



A few examples are shown below for the press area and section finishing from the mail activity code.



Front:	Black,PMS 1										
Back:	Black,PMS 1										
Side	Forms	Pages	#Up	Plates	Gross Qty	MR Waste	Run Waste	Net Qty	M/R Hrs	Run Hrs	W/U Hrs	PM Hrs
Front	1	16	1	2	1,538	225	63	1,250	0:50	0:26	0:15	0:30

Maintain Processes

Description | Activity Links | Pricing | Process Standards

	Short Code	Plant Code	Make Ready Mins	Number of Operators	Default Qty	Qty1	Speed1
1	LETTER	0100	25.00	0.00	0	10,000	4,000
2	11X17	0100	0.00	0.00	0	10,000	4,000
3	11X17	0100	0.00	0.00	0	10,000	4,000
4	FLD	0100	30.00	0.00	0	10,000	10,000

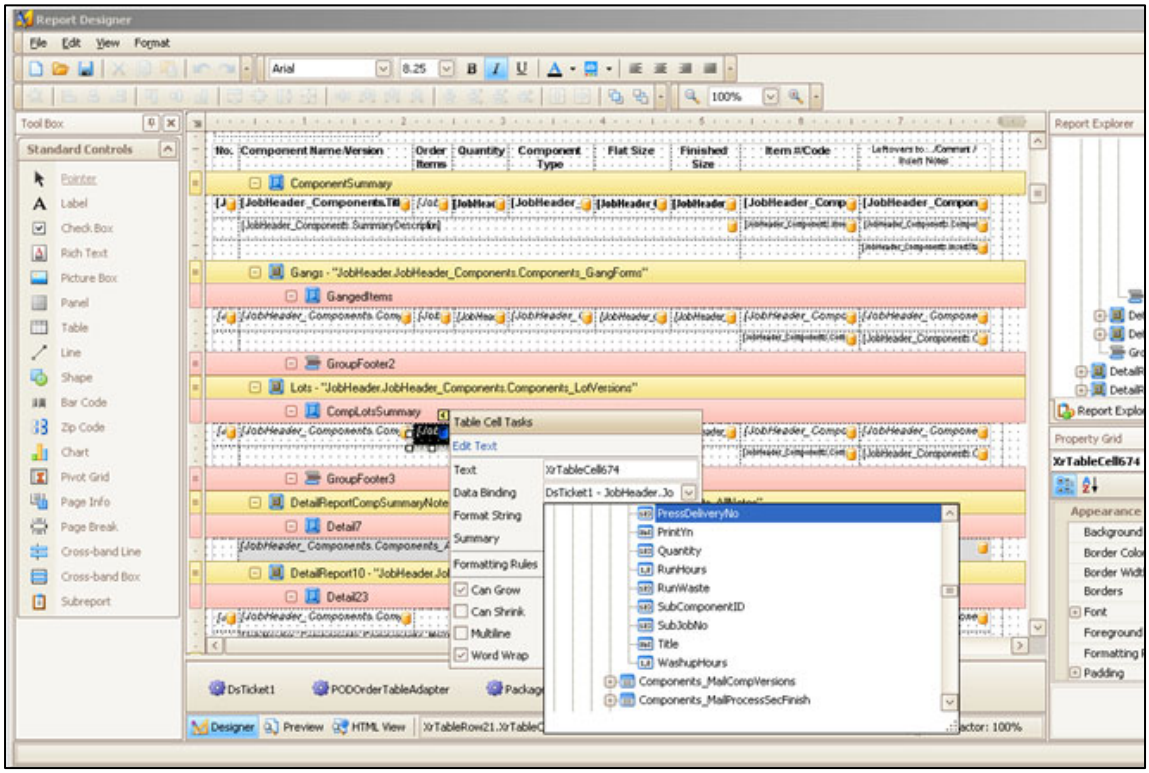
Section Finishing

Section Finishing/Activity Description	Other Information	Gross Qty	Waste	Net Qty	Hours	Activity / Task ID
FOLDING	1 Up	10,000	0	10,000	1:30	**74010** #:187653

Press Delivery No and Lot No

Additional Dataset fields are added to the Combo Work Ticket for **Press Delivery No** and **Lot No**.

The **Press Delivery No** is located in the Components binding.

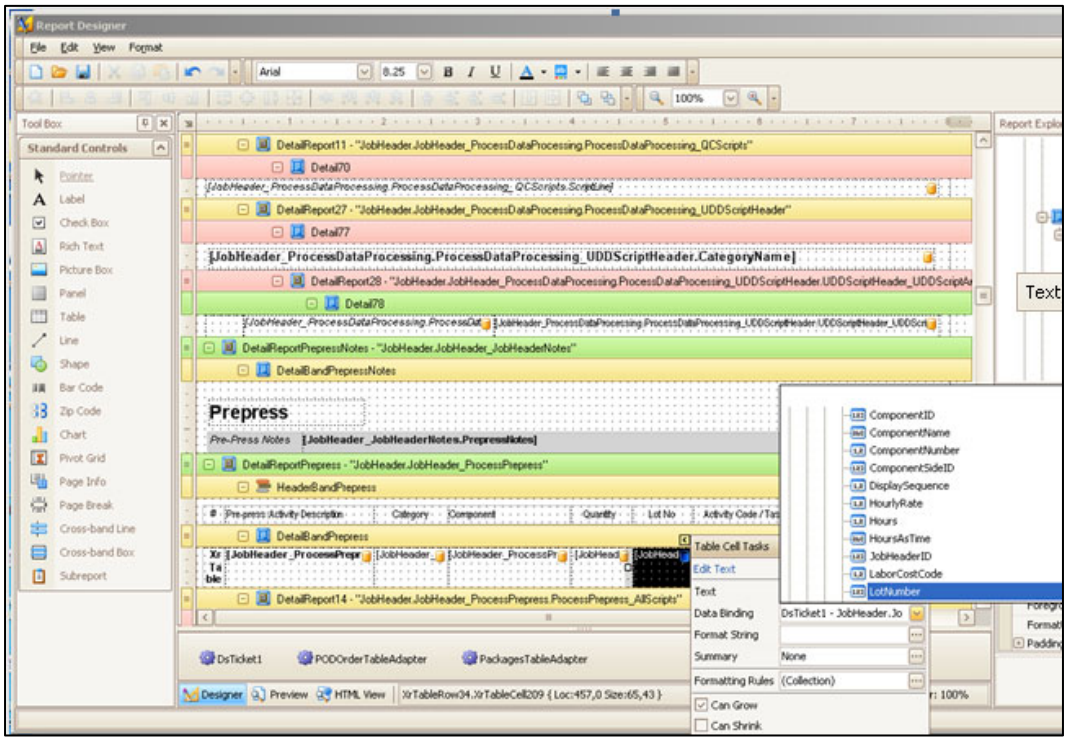


Job Summary

Components

No.	Component Name/Version	Press Delive	Quantity	Component Type	Flat Size
1	Parent		10,000	Printed	
	1 forms x 16 pgs, 1up Sheetwise,2/2,240 Heidelberg				
2	Child-1	1	2,500	1	
3	Childtest-2	1	2,500	1	
4	Child-3	1	2,500	1	
5	Child-4	1	2,500	1	

The **Lot No** is located in the Process Prepress.



Job Details

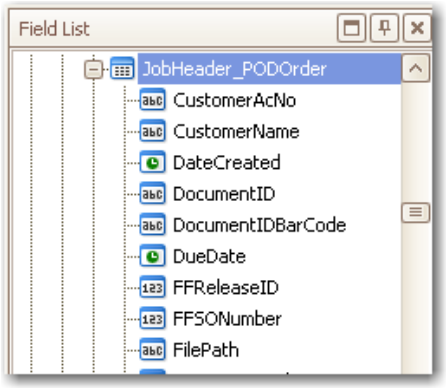
Prepress

Pre-Press Notes

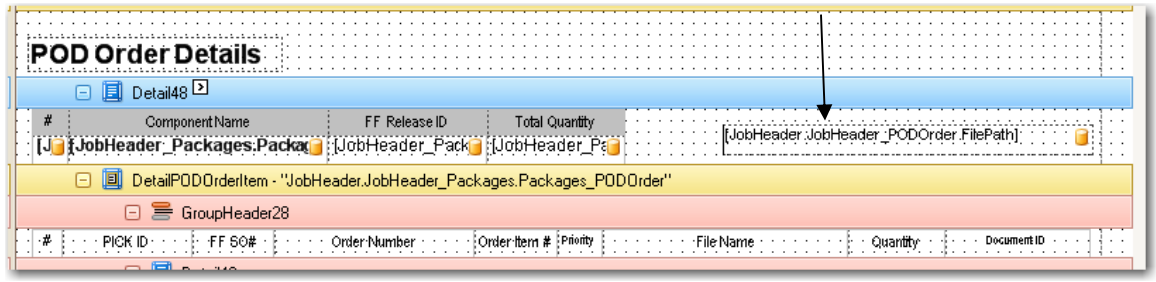
#	Pre-press:Activity Description	Category	Component	Quantity	Lot No	Activity Code / Task ID
1	**Dylux Proof**	12 x 19	Child-1	1	1	**42010**
2	**Dylux Proof**	16 x 21	Child-3	1	3	**42010**

File Path Field

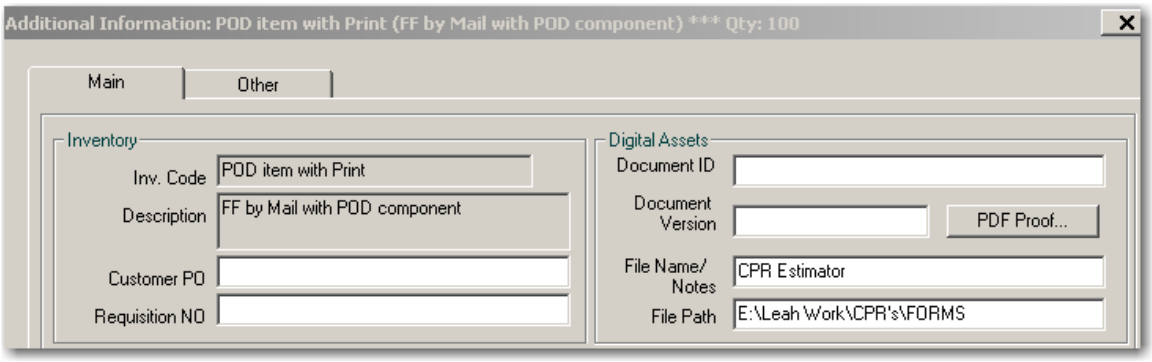
Added File Path to the Field List for the .net Work Ticket.

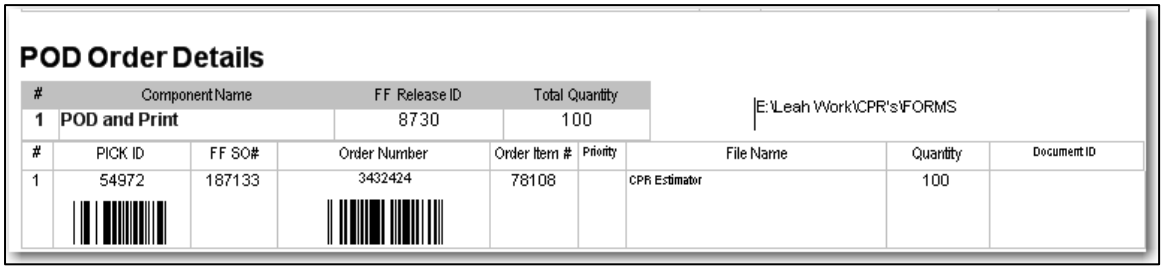


You can drag and place to the area where you wish to see this, and then label as needed.



The **File Path** information entered in the sales order in fulfillment is then displayed.

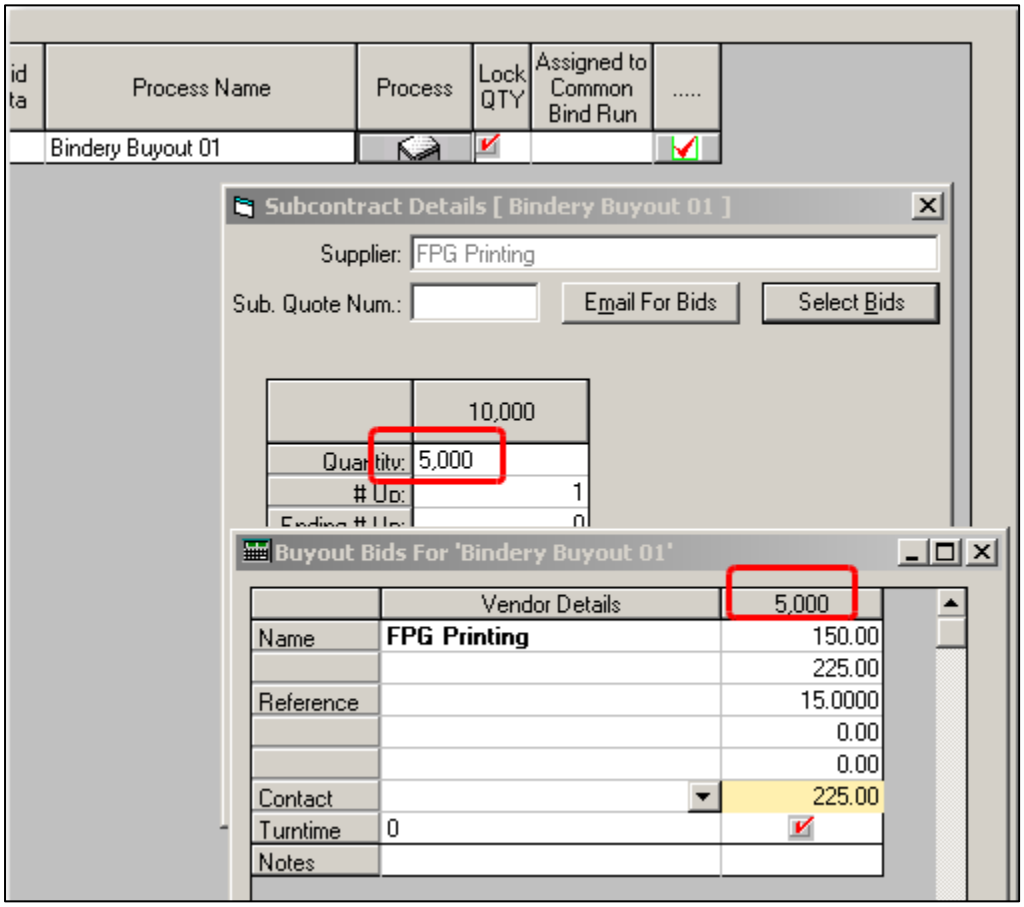




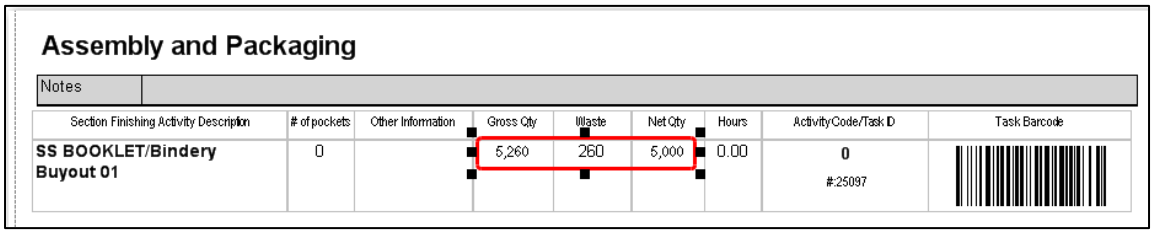
Buyout Process Quantity override on the Combo Work Ticket

The Combo Work Ticket now shows the overridden quantity entered in the **Quantity** field.

Job Qty=10,000-Buyout Process Qty=5000

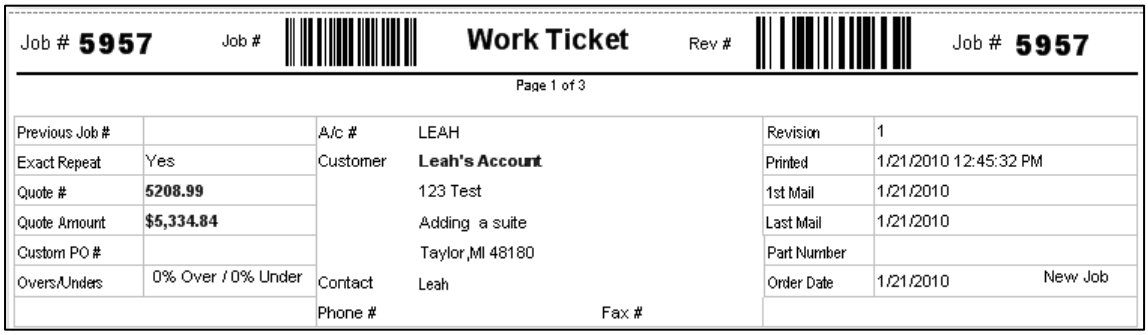


The Combo Work Ticket shows the Buyout Process at 5,000+waste.



Customer ID field Job Header

The customer account number is added to the Combo Work Ticket. This displays just above the customer name.



Job # **5957** Job # **Work Ticket** Rev # Job # **5957**

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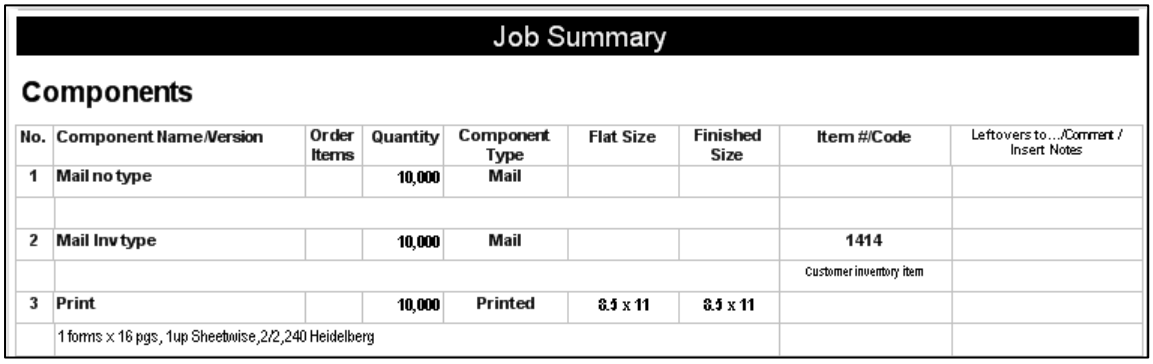
Previous Job #		A/c #	LEAH	Revision	1
Exact Repeat	Yes	Customer	**Leah's Account**	Printed	1/21/2010 12:45:32 PM
Quote #	**5208.99**		123 Test	1st Mail	1/21/2010
Quote Amount	**$5,334.84**		Adding a suite	Last Mail	1/21/2010
Custom PO #			Taylor,MI 48180	Part Number	
Overs/Unders	0% Over / 0% Under	Contact	Leah	Order Date	1/21/2010 New Job
		Phone #	Fax #		

Change component type from Inventory to Mail

Change the wording under the **Component Type** columns on the Combo Work Ticket for mail components from **Inventory** to **Mail**. This was confusing to some customers because not all mail components were assigned an inventory item.



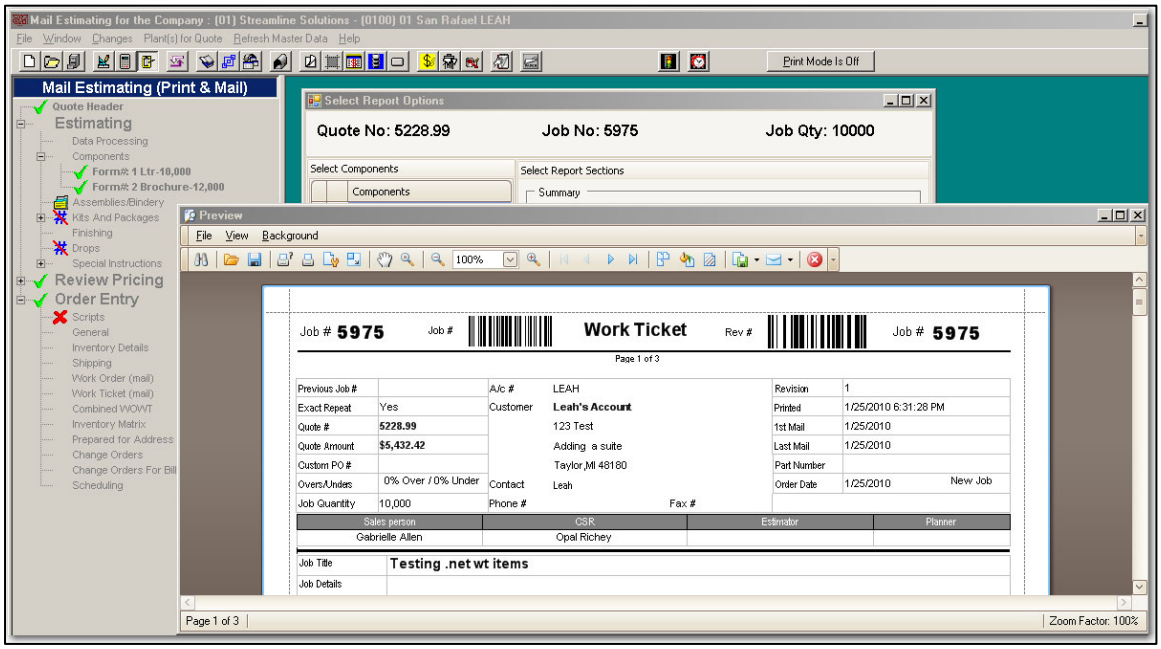
Job Summary

Components

No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment / Insert Notes
1	**Mail no type**		**10,000**	**Mail**				
2	**Mail Inv type**		**10,000**	**Mail**			**1414**	
							Customer inventory item	
3	**Print**		**10,000**	**Printed**	**8.5 x 11**	**8.5 x 11**		
	1 forms x 16 pgs, 1up Sheetwise,2/2,240 Heidelberg							

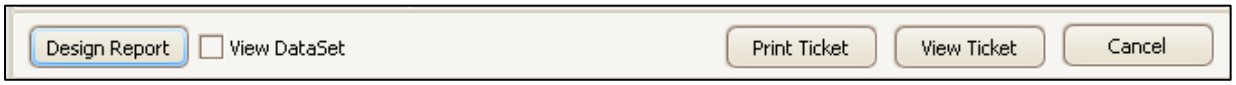
Add Job Quantity to Combo Work Ticket

Added **Job Quantity** to the Combo Work Ticket.

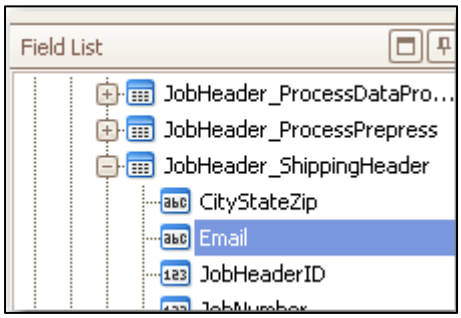


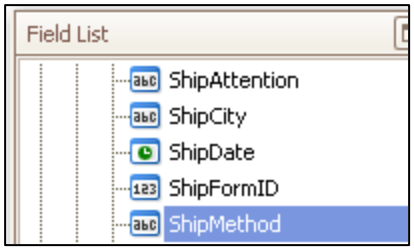
Add Shipping Method and Email Address

In the Combo Work Ticket Report Designer, new fields are added for **Ship Method** and **Email** for the planned shipments. To access, click the **Design Report** button.

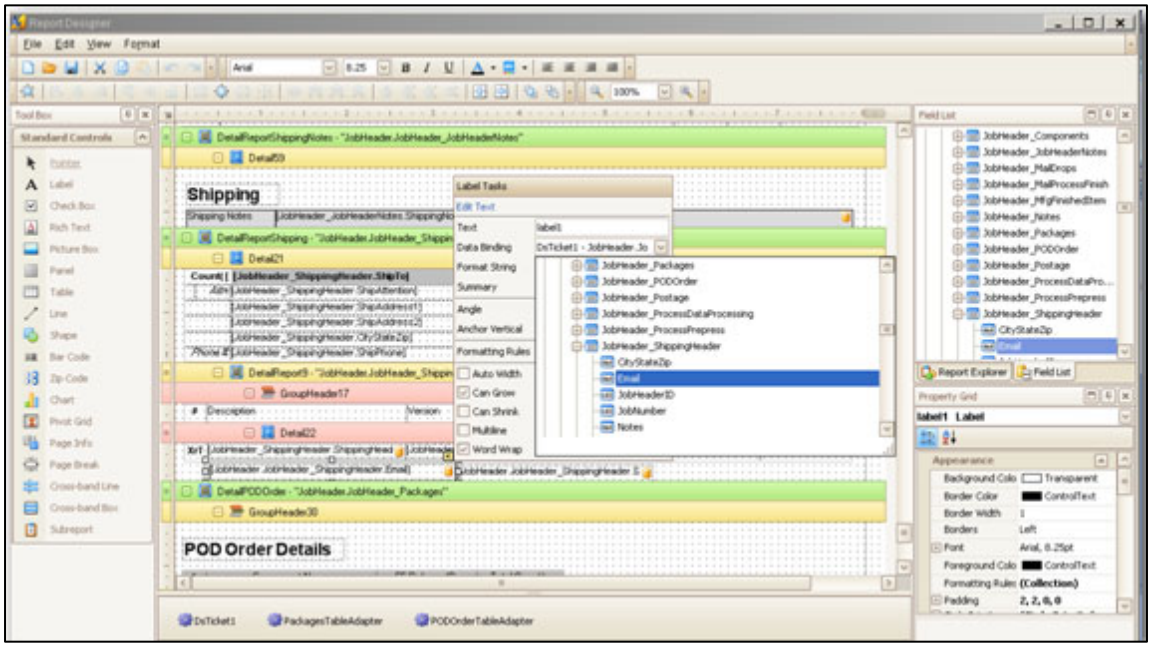


You can see the fields have been added to the **Field List**.

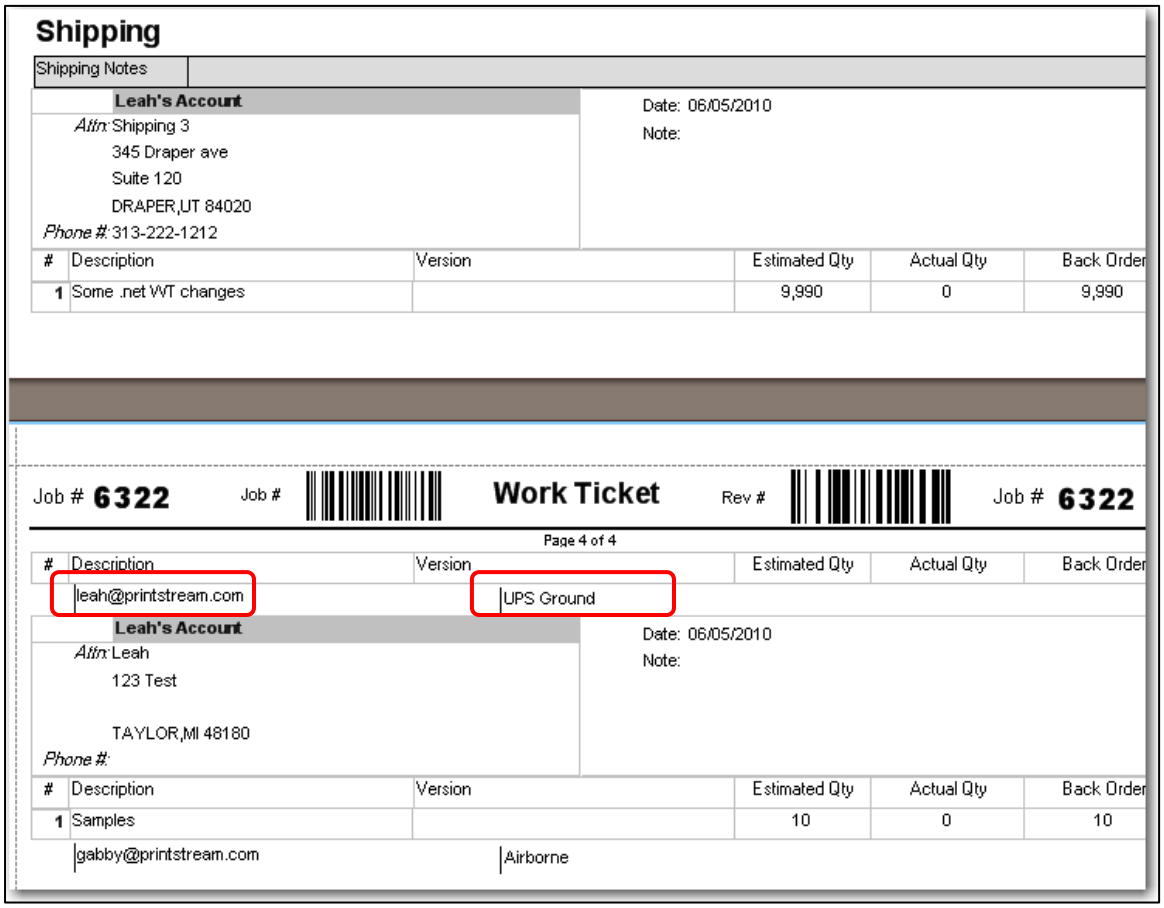




Create your labels in the areas you wish to display the field. Notice that this area of the report hierarchy level is the Job_Header, so you need to be sure you select the **Email** and **Ship Method** field list items from that level.



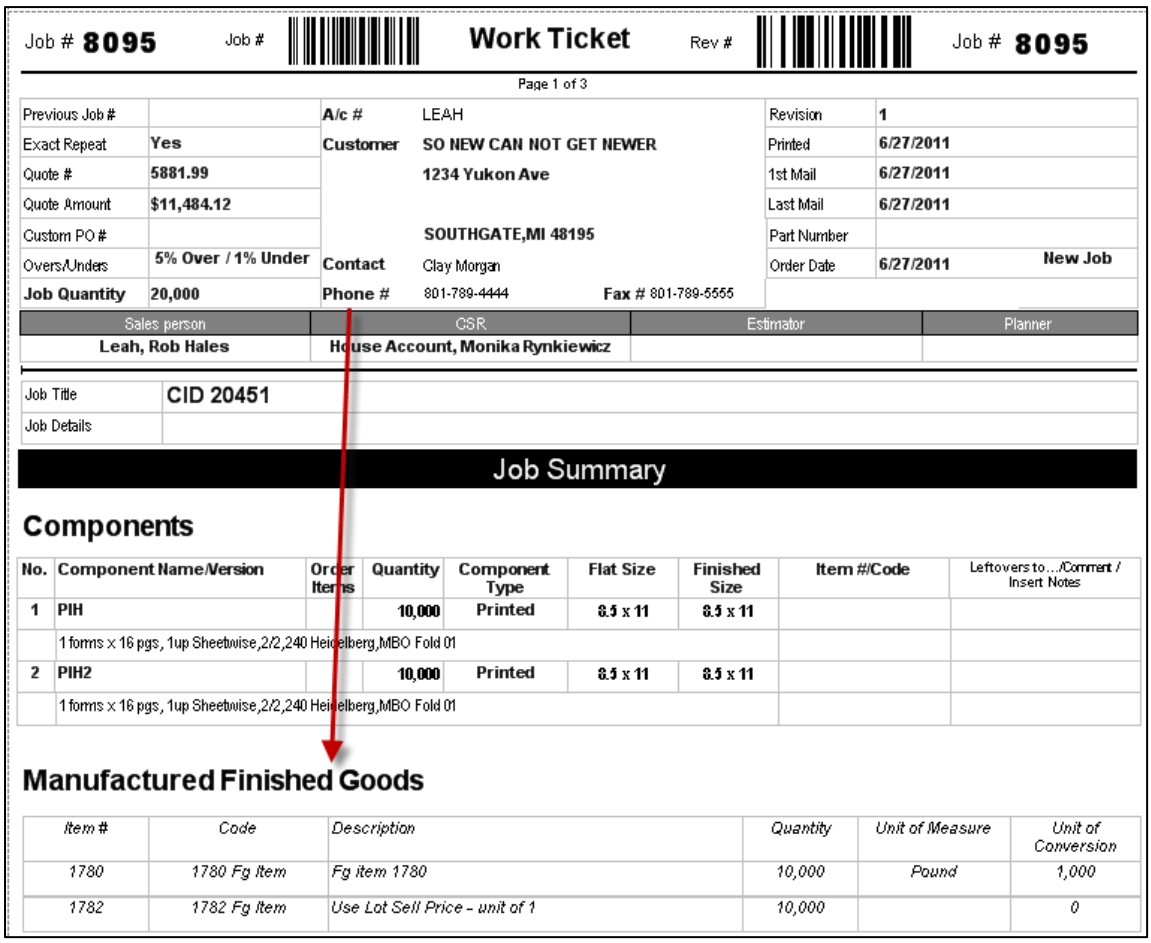
Email and Ship Method appear for each shipping record you have defined for your job.



Manufactured Finished Goods

Combo Work Ticket - Add in Job Summary section and then label an area **Manufactured Finished Goods Inventory**.

Manufactured Finished Goods Inventory is added in **Job Summary**. This lists the manufactured finished goods inventory items that are expected to be produced and that are linked in the Multi Inventory section of the Quote Header.



Job # **8095** Job # **Work Ticket** Rev # Job # **8095**

Page 1 of 3

Previous Job #		A/c #	LEAH	Revision	1
Exact Repeat	Yes	Customer	SO NEW CAN NOT GET NEWER	Printed	6/27/2011
Quote #	5881.99		1234 Yukon Ave	1st Mail	6/27/2011
Quote Amount	$11,484.12			Last Mail	6/27/2011
Custom PO #			SOUTHGATE,MI 48195	Part Number	
Overs/Unders	5% Over / 1% Under	Contact	Clay Morgan	Order Date	6/27/2011 New Job
Job Quantity	20,000	Phone #	801-789-4444 Fax # 801-789-5555		

Sales person	CSR	Estimator	Planner
Leah, Rob Hales	House Account, Monika Rynkiewicz		

Job Title	CID 20451
Job Details	

Job Summary

Components

No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment / Insert Notes
1	PIH		10,000	Printed	8.5 x 11	8.5 x 11		
	1 forms x 16 pgs, 1up Sheetwise,2/2,240 Heidelberg,MBO Fold 01							
2	PIH2		10,000	Printed	8.5 x 11	8.5 x 11		
	1 forms x 16 pgs, 1up Sheetwise,2/2,240 Heidelberg,MBO Fold 01							

Manufactured Finished Goods

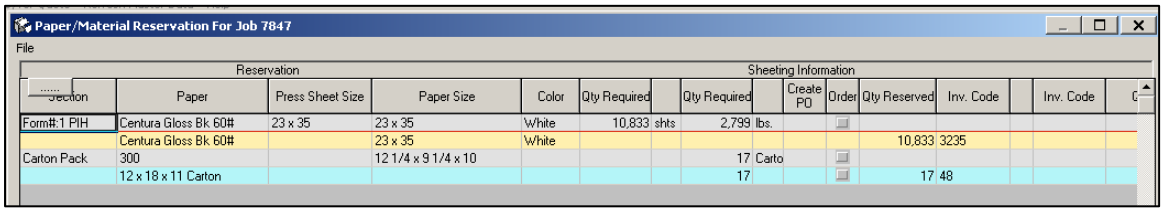
Item #	*Code*	*Description*	*Quantity*	*Unit of Measure*	*Unit of Conversion*
1780	*1780 Fg Item*	*Fg item 1780*	*10,000*	*Pound*	*1,000*
1782	*1782 Fg Item*	*Use Lot Sell Price - unit of 1*	*10,000*		*0*

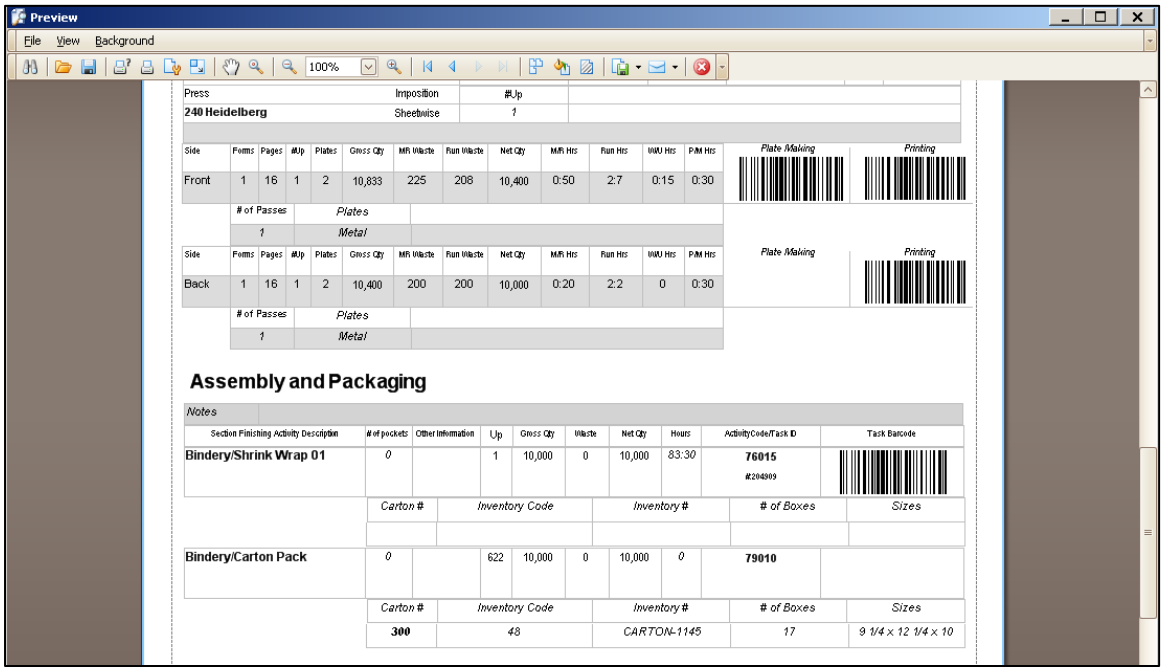
Carton Reservation Information

Combo Work Ticket - Add Carton Reservation information to ticket.

The following information is now displayed to the carton process on the .net work ticket when Cartons are reserved through the Paper Reservation screen.

- The Inventory Item number of the actual reserved carton.
- The Inventory Code of the actual reserved carton.
- The Number of cartons reserved.
- The dimensions of the carton reserved.

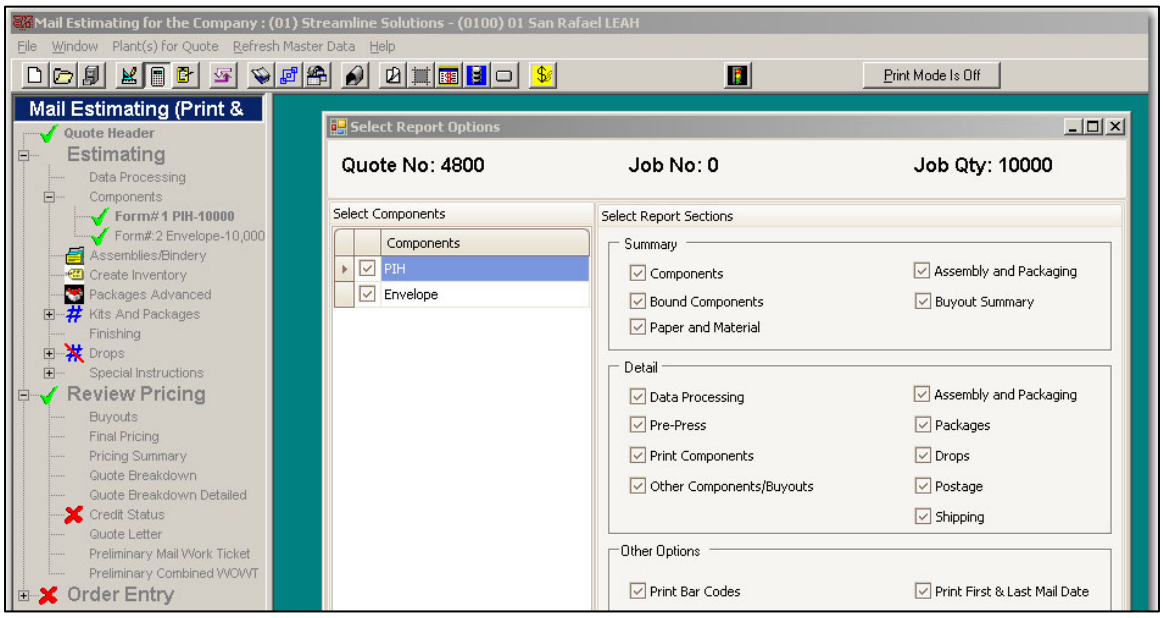


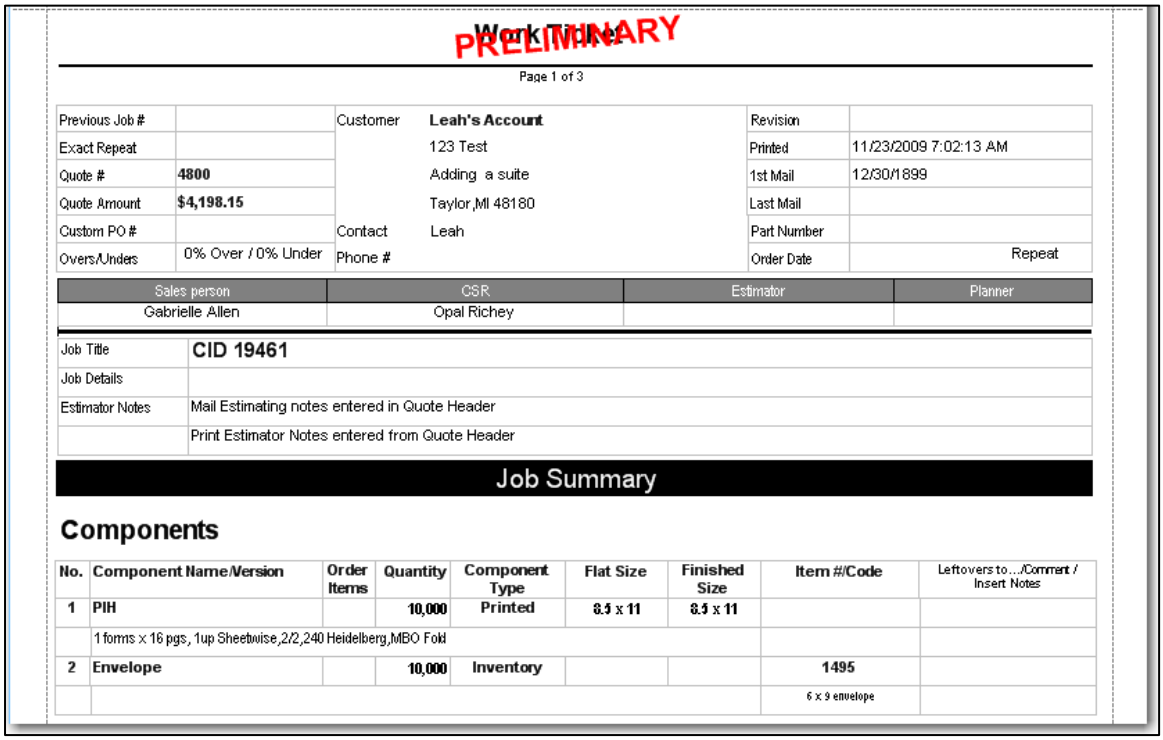


Preliminary Combo Work Ticket

Preliminary Work Ticket in review stage before job creation

A Preliminary Combo Work Ticket in .net is available to be previewed prior to the job conversion. The Combo Work Ticket displays **Preliminary** on the report. Once the quote is converted to a job, though, the work ticket displays as a normal job work ticket.

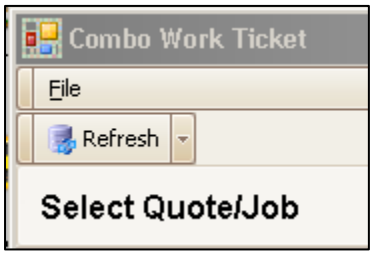




Combo Work Ticket – Stand-Alone Program

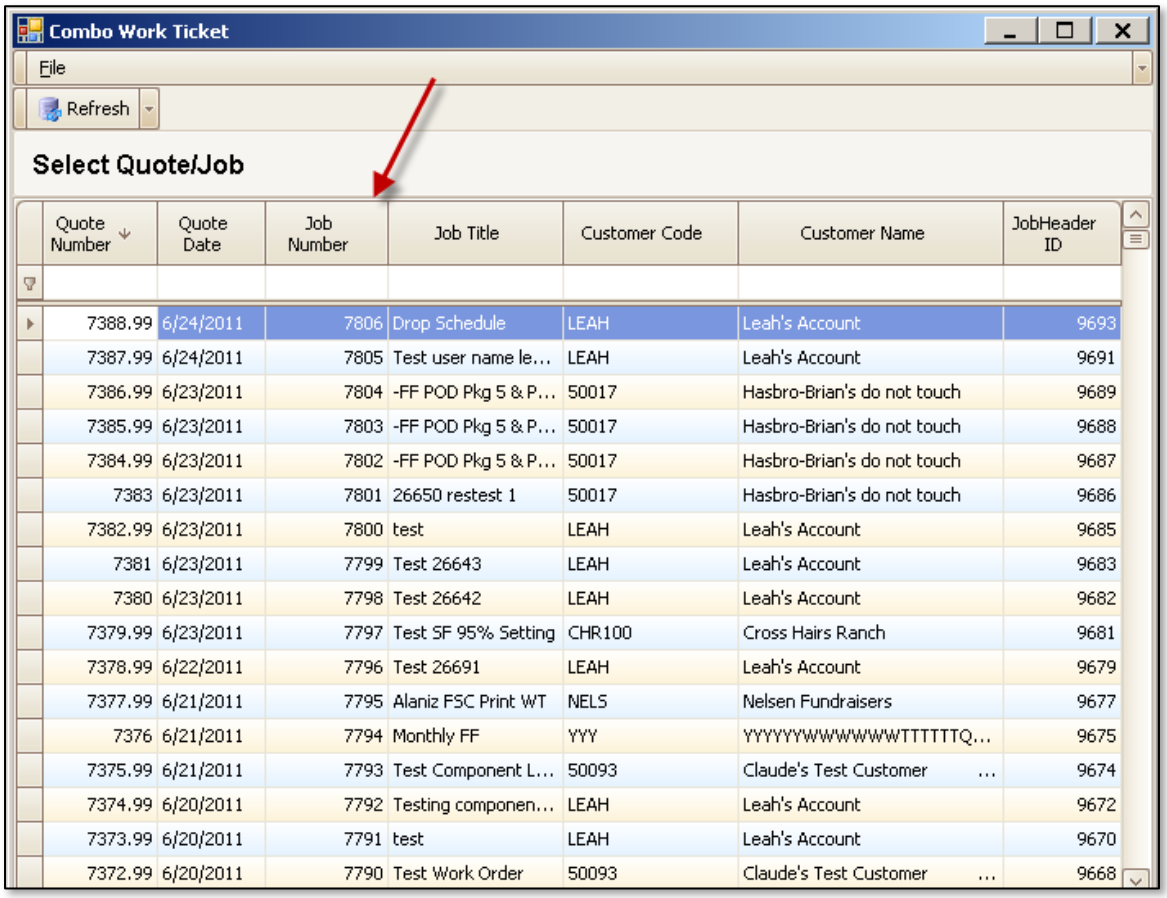
Add a manual and/or automatic refresh to the Combo Work Ticket Program

A **Refresh** button was added to the stand alone Combo Work Ticket. When new jobs are created in the Print and Mail Estimating module, you no longer have to close the stand alone program and re-open to refresh to job number listing.



Descending Default Sort Order

The default sort order on the **Job Number** column is descending.

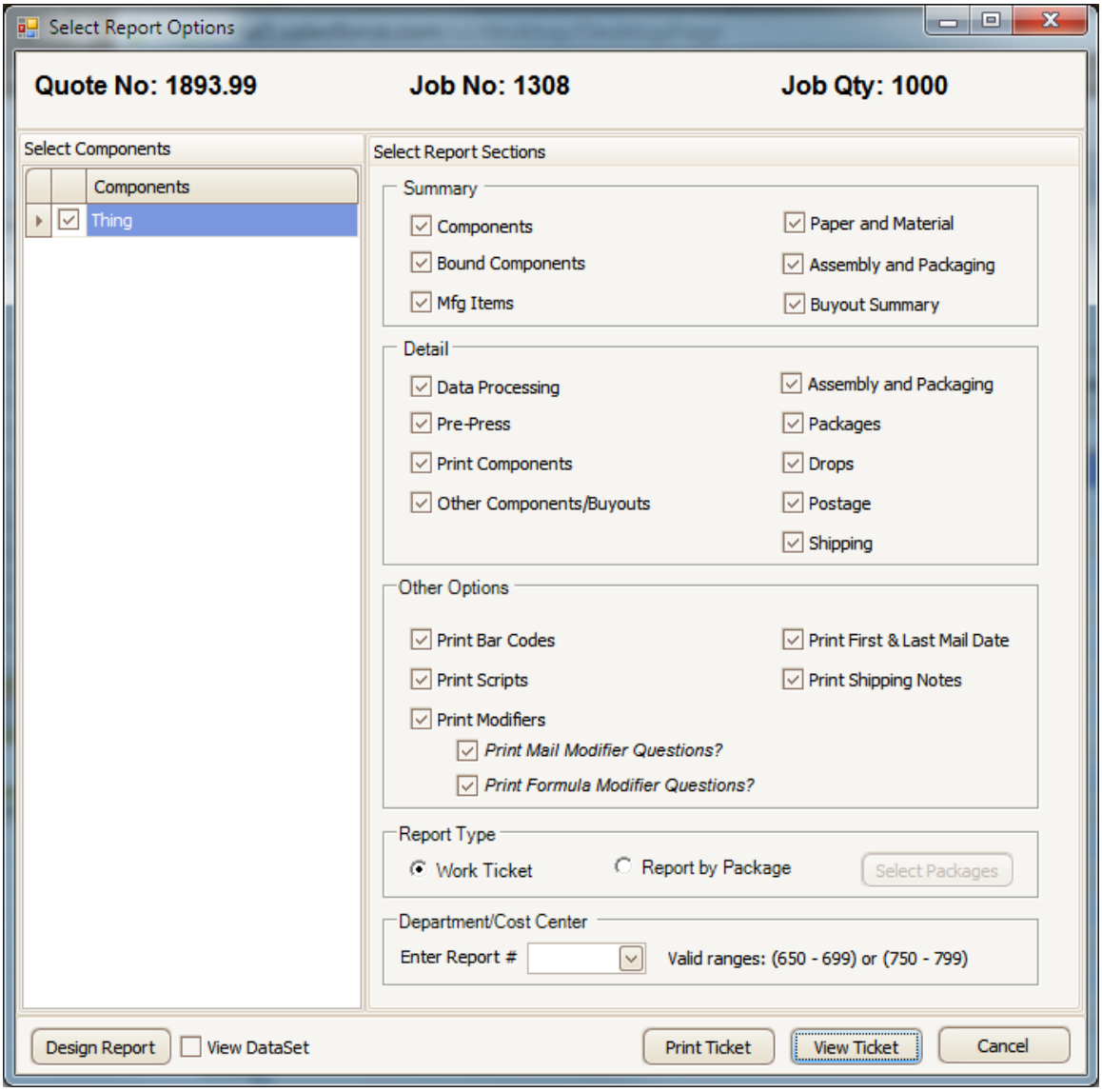


Quote Number	Quote Date	Job Number	Job Title	Customer Code	Customer Name	JobHeader ID
7388.99	6/24/2011	7806	Drop Schedule	LEAH	Leah's Account	9693
7387.99	6/24/2011	7805	Test user name le...	LEAH	Leah's Account	9691
7386.99	6/23/2011	7804	-FF POD Pkg 5 & P...	50017	Hasbro-Brian's do not touch	9689
7385.99	6/23/2011	7803	-FF POD Pkg 5 & P...	50017	Hasbro-Brian's do not touch	9688
7384.99	6/23/2011	7802	-FF POD Pkg 5 & P...	50017	Hasbro-Brian's do not touch	9687
7383	6/23/2011	7801	26650 restest 1	50017	Hasbro-Brian's do not touch	9686
7382.99	6/23/2011	7800	test	LEAH	Leah's Account	9685
7381	6/23/2011	7799	Test 26643	LEAH	Leah's Account	9683
7380	6/23/2011	7798	Test 26642	LEAH	Leah's Account	9682
7379.99	6/23/2011	7797	Test SF 95% Setting	CHR100	Cross Hairs Ranch	9681
7378.99	6/22/2011	7796	Test 26691	LEAH	Leah's Account	9679
7377.99	6/21/2011	7795	Alaniz FSC Print WT	NELS	Nelsen Fundraisers	9677
7376	6/21/2011	7794	Monthly FF	YYY	YYYYYYWWWWWWTTTTTTQ...	9675
7375.99	6/21/2011	7793	Test Component L...	50093	Claude's Test Customer ...	9674
7374.99	6/20/2011	7792	Testing componen...	LEAH	Leah's Account	9672
7373.99	6/20/2011	7791	test	LEAH	Leah's Account	9670
7372.99	6/20/2011	7790	Test Work Order	50093	Claude's Test Customer ...	9668

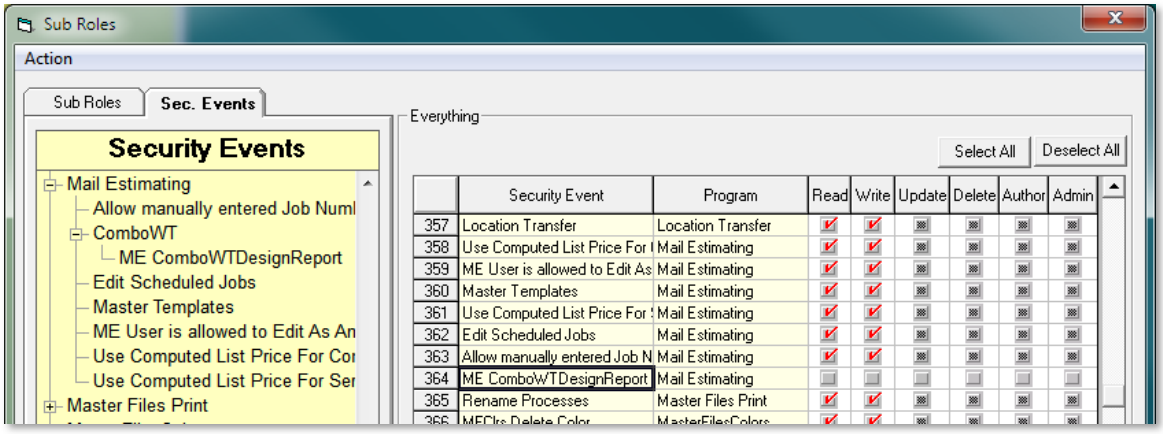
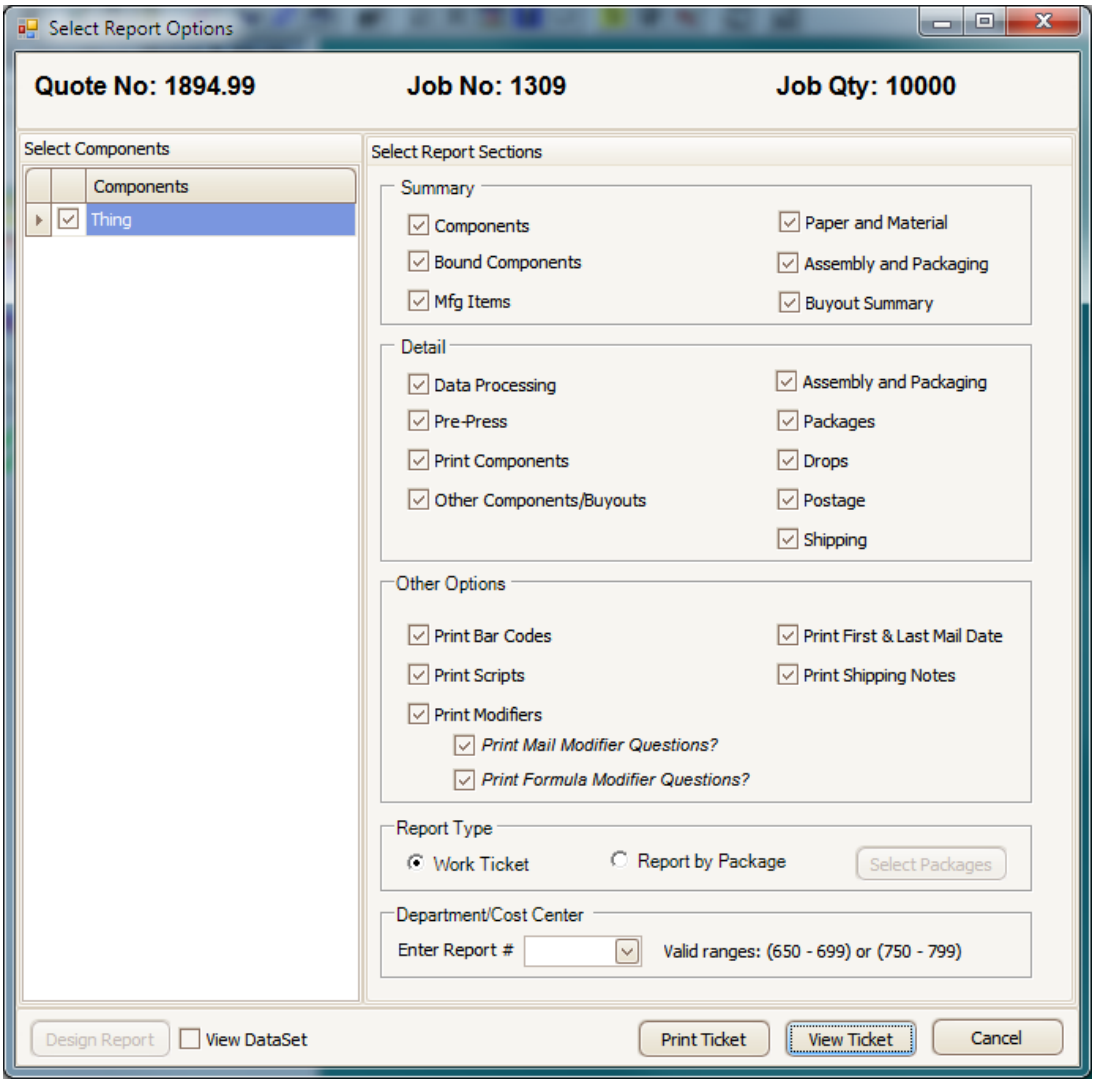
Combo Work Ticket – Security Event for Design Report

Security Event to prohibit use of Design Report in Print & Mail Estimating

The screen below shows an enabled **Design Report** button.



Add a Security Event called **ME Combo WT Design Report** and clear the **Read** and **Write** check boxes.



Below, the **Design Report** button is now disabled.