

Author	Status	Effective Date
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### 1.0 Purpose

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This SOP is intended to outline the proper steps, procedures and resources to create bulk work orders in Sage X3.

### 2.0 Scope

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This document covers the standard procedures to be followed for employees in the production department when creating bulk work orders in X3. By following the instructions, the workload will be completed accurately and consistently.

**Assistants and X3 Logins and Passwords are a prerequisite to follow this SOP. If you do not have one, contact your supervisor or Gemini IT (EXT 2300).**

### 3.0 Safety

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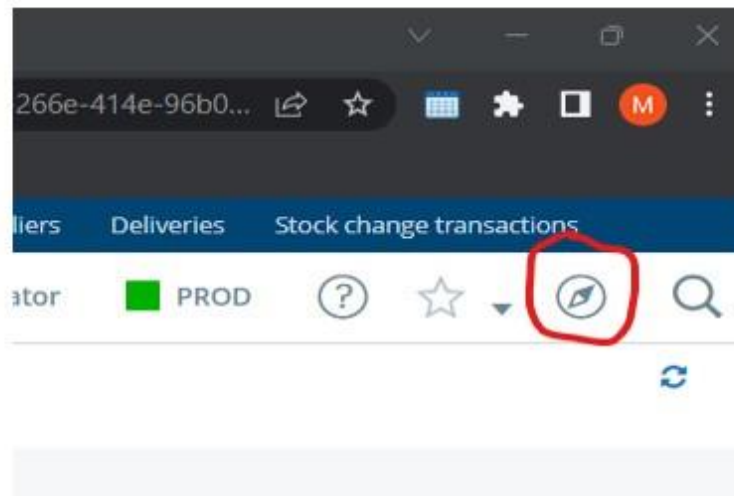
**\*Absolutely NO Electronic Devices in the Hazardous Environments. (Production, Fill-Off, TWP Room)**

**\*Absolutely NO use of headphones, ear buds, etc. inside the Warehouse and/or Hazardous Environments.**

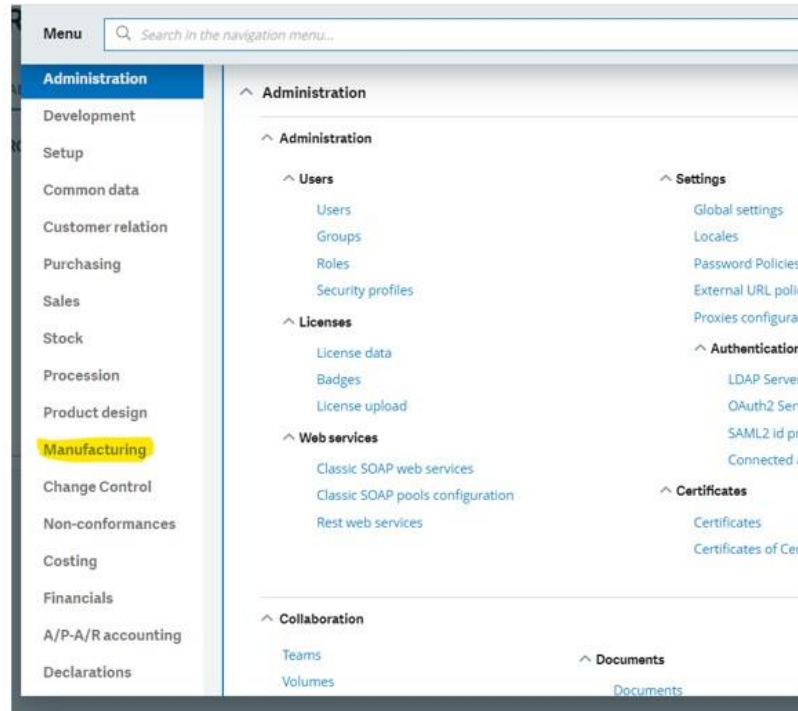
#### 4.0 Creating Work Orders in Sage X3

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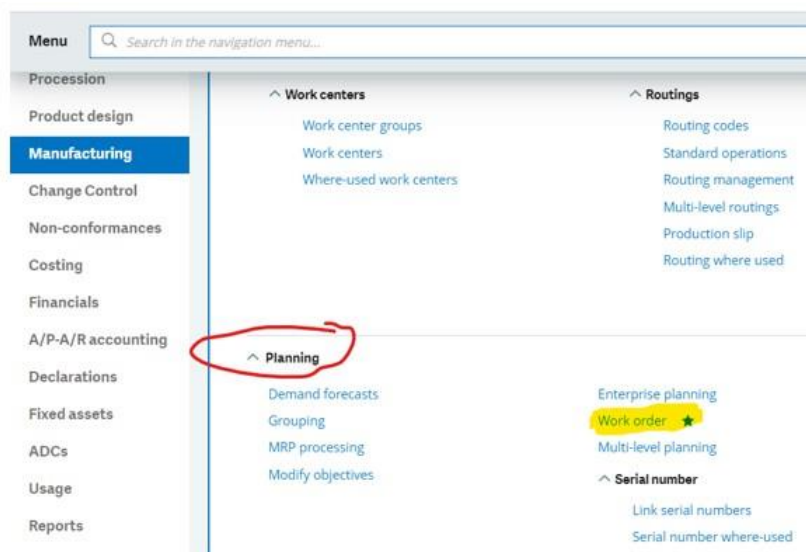
- 4.1 Navigate to the X3 homepage on a desktop computer.  
<http://10.1.1.109:8124/auth/login/page>
- 4.2 Login using your login and password supplied by your supervisor or the IT department. Your X3 password may be different from your Assistics password. To ensure the security of X3 you will periodically be prompted to change your password.
- 4.3 Click on the Navigation button in the top right-hand corner of the Sage X3 home page. In the example the button is circled in red.



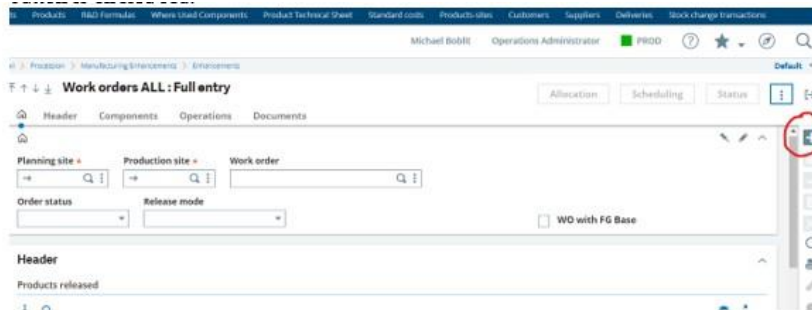
4.4 In the most lefthand column, navigate to "Manufacturing". In the example the correct selection is highlighted yellow.



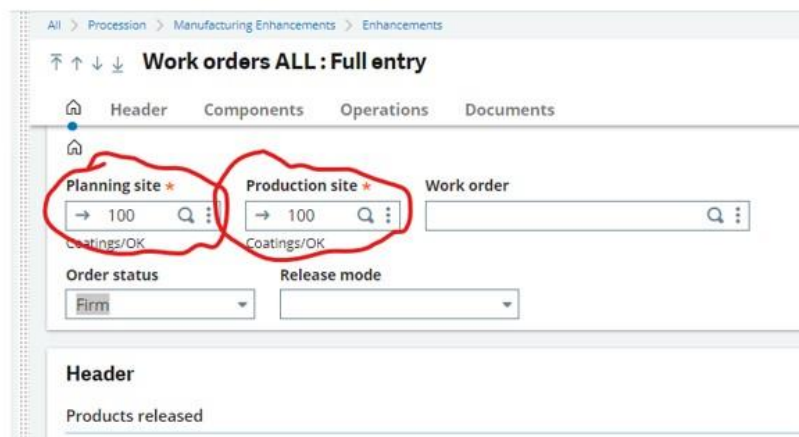
4.5 Once you have selected "Manufacturing", the center screen will snap to the manufacturing sub menu. Navigate to the Sub Menu "Planning" (Circled Red), then click on the link for "Create Work Order" (Highlighted Yellow).



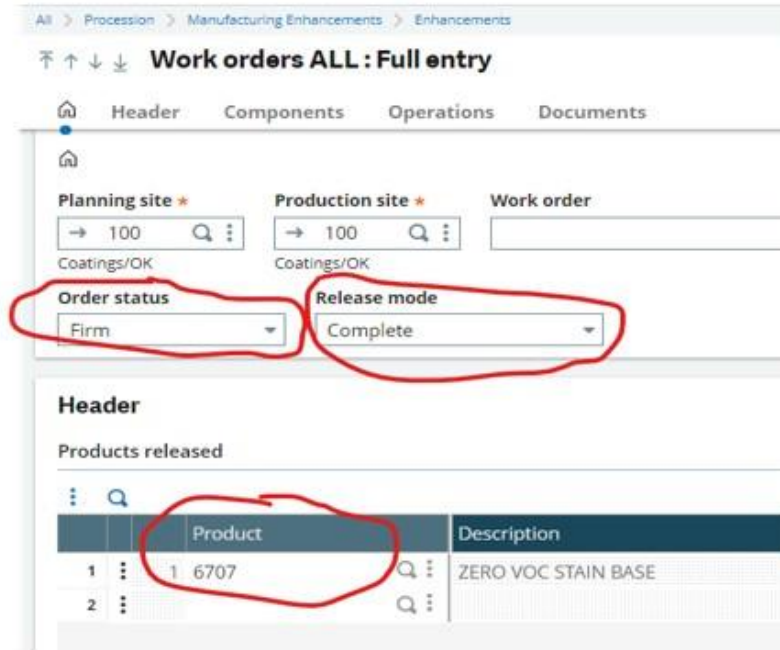
- 4.6 When prompted for "Transaction selection", select "All full Entry"
- 4.7 Press "New" button in the top right hand portion of the screen to begin creating a new work order. You must always start the process of creating a work order by pressing the "New" button. In the example the "New" button is circled red.



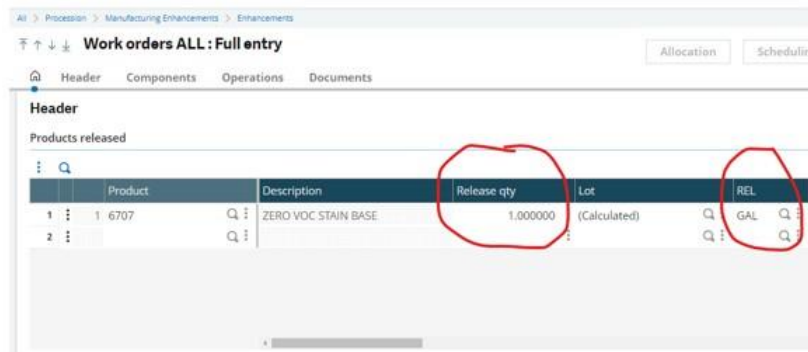
- 4.8 Enter the planning site you are creating a work order for in the field listed as "Planning Site" then press tab to move to the "Production Site" This field has an orange asterisk next to it. (Example EI Reno is site 100, Grand Prairie Texas is site 110).
- 4.9 Enter the "Production Site" in the production site field. This field also has an orange asterisk next to it. Planning Site and Production Site will always match. In the example the planning site and production site are site 100 for the EI Reno location.



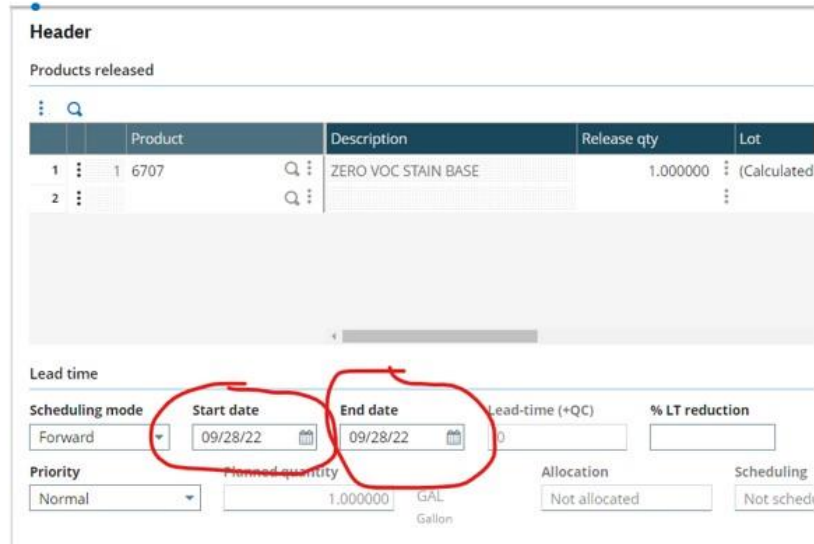
4.10 Enter the bulk item key in the "Product" field. This field is in the "Header" section of the work order form. It is circled red in the example. Make sure that the "Order Status" is set to firm and the "Release Mode" is set to complete.



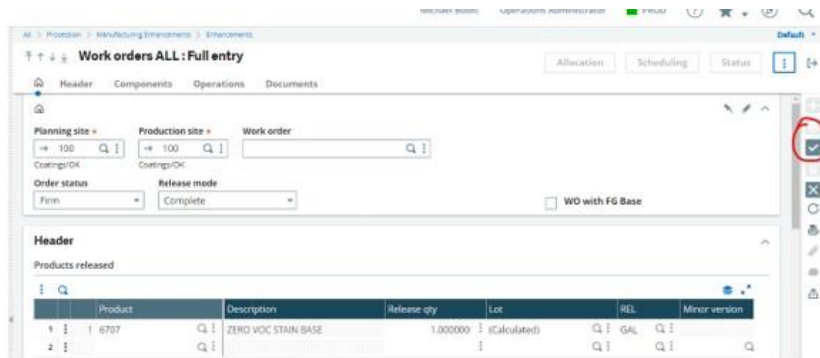
4.11 Navigate to the right on line one until you reach the field "Release Qty". Enter in the amount of product that is required to be produced. Make note of the release unit of measure abbreviated "REL" in the column header. Most bulk products are released in gallons, but some bulk products are released in lbs. Make sure you are creating the work order for the correct amount and the correct unit of measure. See the example below.



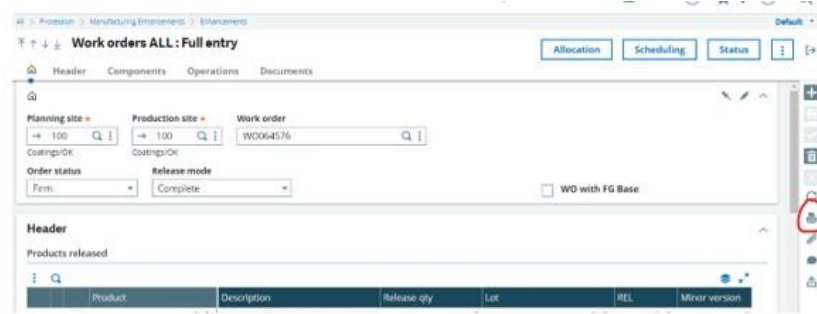
4.12 Under the lead time section, select forward in the "Scheduling Mode" field, then select the desired "Start Date" and "End Date".



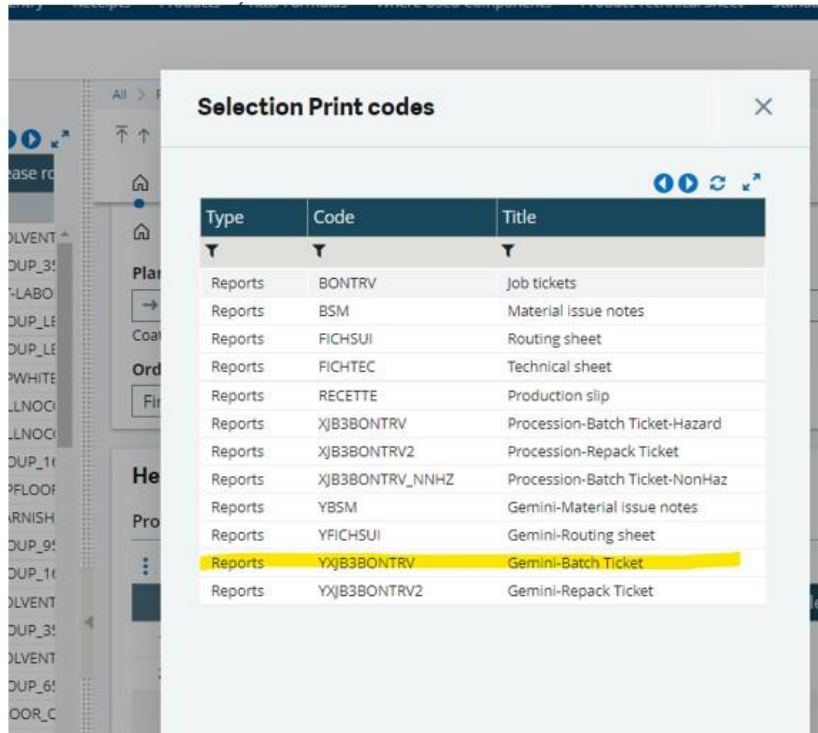
4.13 Press the "Create Button" to finish creating the bulk work order. The "Create" button look like a check mark in the upper right-hand corner of your screen.



4.14 You are now finished creating the Work Order. Your last step will be to generate a PDF of the Work Order to either print off, email, or file share. Press the "Print" button on the right-hand side of the screen and select "Record".



- 4.15 Once you have selected record a screen will pop-up with a selection of print codes with are essentially different reports to display the information. For a **Bulk Work Order**, select "Gemini Batch Ticket".

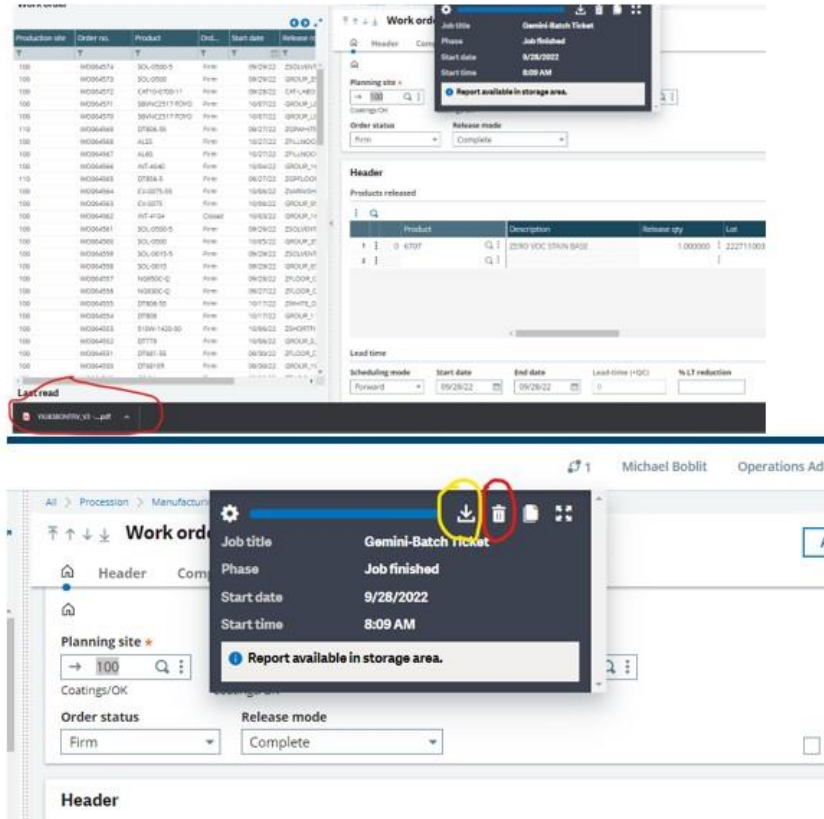


- 4.16 After selecting "Gemini Batch Ticket" you will be brought to the report parameters screen. **Do not modify or change any of the parameters on this screen!** Press the print button located at the top of the screen.





4.17 When the report has finished generating the file will appear in the bottom section of your browser window like when you download any file from the internet. When finished with the file press the garbage button to remove the pop-up screen (Circled red). If you need to download the file again, press the download button, circled in yellow in the example.





- 4.18 If you need to modify the work order in the future for changes to start date, end date, quantity, components, or to reprint. Follow this SOP from the start to section "G". Instead of pressing "New" to create a new work order, you can search the most left-hand toolbar by work order number, product, and/or by site.

Production site	Order no.	Product	Ord...	Start date	Release rd
100	WO064574	SOL-0500-5	Firm	09/29/22	ZSOLVENT
100	WO064573	SOL-0500	Firm	09/29/22	GROUP_35
100	WO064572	CAT10-0700-11	Firm	09/28/22	CAT-LABO
100	WO064571	SBVNC2517-TOYO	Firm	10/07/22	GROUP_LE
100	WO064570	SBVNC2517-TOYO	Firm	10/07/22	GROUP_LE
110	WO064569	DT806-55	Firm	09/27/22	ZGPWHITE
100	WO064568	AL55	Firm	10/27/22	ZFILLNOC
100	WO064567	AL60	Firm	10/27/22	ZFILLNOC
100	WO064566	INT-4040	Firm	10/04/22	GROUP_10
110	WO064565	DT856-5	Firm	09/27/22	ZGPFLOOF
100	WO064564	CV-0375-55	Firm	10/06/22	ZVARNISH
100	WO064563	CV-0375	Firm	10/06/22	GROUP_95
100	WO064562	INT-4104	Closed	10/03/22	GROUP_10

- 4.19 Once you have found the work order you are looking for, select it from this list and follow the appropriate steps outlined in the SOP to update, reprint, or otherwise modify the work order as needed.

**5.0 References**

Reference	Title
1	None