NAVEKSA Setup questions / All apps

1 — Last update: May 16, 2023

NAVEKSA A/S

Table of Contents
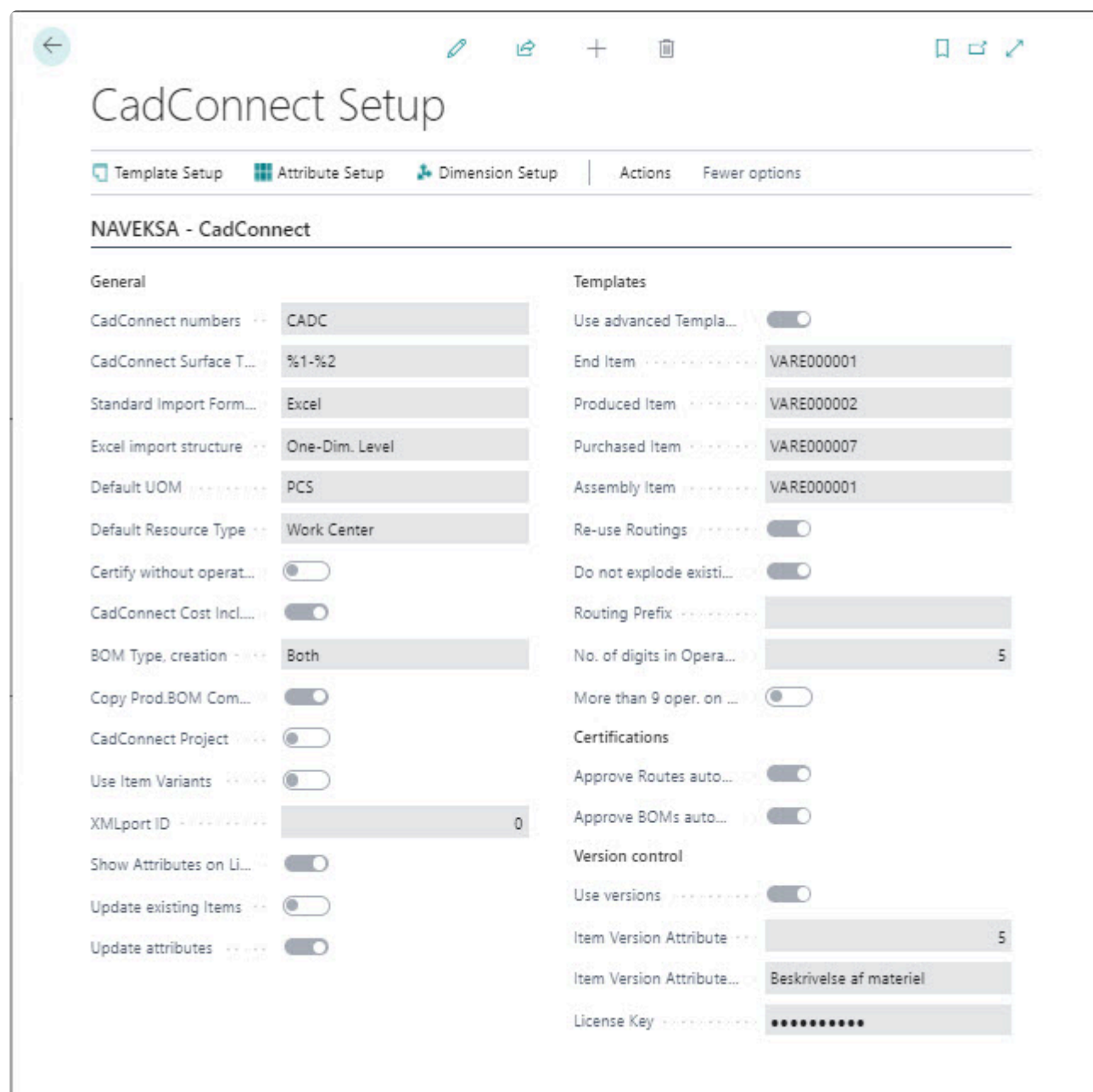
1. CadConnect setup parameters

CadConnect Setup

Template Setup   Attribute Setup   Dimension Setup | Actions   Fewer options

NAVEKSA - CadConnect

General		Templates	
CadConnect numbers	CADC	Use advanced Templa...	[toggle off]
CadConnect Surface T...	%1-%2	End Item	VARE000001
Standard Import Form...	Excel	Produced Item	VARE000002
Excel import structure	One-Dim. Level	Purchased Item	VARE000007
Default UOM	PCS	Assembly Item	VARE000001
Default Resource Type	Work Center	Re-use Routings	[toggle on]
Certify without operat...	[toggle off]	Do not explode existi...	[toggle on]
CadConnect Cost Incl....	[toggle on]	Routing Prefix	
BOM Type, creation	Both	No. of digits in Opera...	5
Copy Prod.BOM Com...	[toggle on]	More than 9 oper. on ...	[toggle off]
CadConnect Project	[toggle off]	**Certifications**	
Use Item Variants	[toggle off]	Approve Routes auto...	[toggle on]
XMLport ID	0	Approve BOMs auto...	[toggle on]
Show Attributes on Li...	[toggle on]	**Version control**	
Update existing Items	[toggle off]	Use versions	[toggle on]
Update attributes	[toggle on]	Item Version Attribute	5
		Item Version Attribute...	Beskrivelse af materiel
		License Key	••••••••••

1.1. CadConnect numbers

Each CADCONNECT construction is assigned a unique number, which can be selected either manually or
automatically using a number series definition from BC.

1.2. CadConnect surface template

For any possible variant of a subject designated for a surface treatment, it is coded here. It is possible to retrieve 2 table values, % 1 is item number and % 2 is the surface code. Surface codes (variants) can be created from the CadConnect Task main menu item – CadConnect – Variant.

> ✳ Example:
> In the actual example the surface template defines that the creation of a surface treatment item shall be named M + the item number + surface description. That is item number F23 becomes MF23-1.
> When using the option: "Insert surface" in CADCONNECT, this action creates a new item with a BOM. You may hereafter add the necessary routing steps.

1.3. Standard import format

2 different options are available: Excel and XML.

1.4. Excel import structure

3 different options are available:

- One dimension levelling (typical AutoCad)
- Multi-dimension levelling (typical Inventor, SolidWorks)
- Parent/Child (Typical SolidEdge, Inventor)

Note:
Only relevant if 'Standard import format' is set to Excel

Standard import file

Checkmark this field if you want to use a standard import file each time.

Standard File Path and Name

If the file to be downloaded from the same place every time, but has different names, it is advantageous to place a path reference in this field. The first time downloading a file to the CADCONNECT, you will be asked for the file format and path, and the system remembers the path.

1.5. Default UOM – Unit of measure

In the case. that your construction does not supply UOM codes, you can here set up a default value, that will then be assigned to the new items.

1.6. Default Ressource Type

If you intend to import operations from your Excel-file, you need to define in this field the type of the operations. You can select either Work Centre or Machine Centre.

1.7. Certify without operationtimes

Selecting this parameter will allow you to certify your CadConnect and create routings with operations that has no time-values in CadConnect. The appropriate times (Setup, Run etc.) will then have to be added manually in standard BC routings.

1.8. CadConnect Costs inclusive setup

When running cost calculation this question specifies if the item cost should contain setup cost also, that is cost from setup operations added to the CadConnect structure.

1.9. BOM type creation

Specifies which kind of bill of materials you want to create.

- Production BOM
- Assembly BOM
- Both

Please notice that Assembly BOM can only be created as end-items with components.
That is you cannot start in the middle of a production BOM adding assembly items.

1.10. Copy prod. BOM comments to prod.order

A checkmark in this field enables a function where the bill of material header comments are copied to the production order as order comments.
This copy takes place when the production order is being refreshed.

1.11. CadConnect project

Using this function means you can import multiple CAD files (one by one) into the same construction, and thus keep on building/extend a CadConnect construction.
In this case, the header item will be considered as the project and this item in itself will therfore **NOT** be created.

1.12. Use item variants

Use standard BC variants.
Selecting this option will open variant-fields in the field-specification when you run the import.

1.13. XMLport ID

If you have selected the Standard Import Format to be XML, you must here supply the actual XML-ID to be used when doing the import.
Please contact your BC supplier or NAVEKSA for the correct value to enter.

Note:
Only relevant if 'Standard import format' is set to XML

1.14. Show attributes on lines

If you use CadConnect with Item Attributes you can have these attributes shown on each of the detail lines, in separate columns. This makes it possible to modify the values imported.

The attributes will always be shown in the Factbox at the right, unless you choose to hide the Factboxs.

1.15. Update existing items

If you want to be able to change fields on existing items then put a checkmark in this field.

The update takes place when you execute the update from a CadConnect.

Fields that will be updated are: Description, Description 2, No. 2.

1.16. Update attributes

If you want to be able to change Attributes on existing items from the CAD system (file) the put a checkmark in this field.

Please note, that as an item can hold only one value for each BC item attribute, selecting the update will remove the existing attribute values from the item and adding new attributes according to the CadConnect you are updating from.

1.17. Use advanced templates

Using this option takes you to the extended setup for using item templates. If you checkmark this field the advanced template use system is initiated.

You can read about the use of Advanced templates here: Using advanced templates

1.18. Templates – various item types

> ❗ It is very important that you familiarize yourself with the concept of using standard BC item creation templates before you begin using the system.

If you dont use advanced templates, it is recommended to set up simple templates, that is 1 template for each item type.

New items are created based on the standard BC item creation template function.

In CadConnect you can setup individual templates for the creation of end-items, fabricated items, purchased items and assembly items.

If you do not set up Templates, new items will be created only with the fields available in CadConnect. You must therefore afterwards manually supply necessary information – and setup-field to each item, eg. Posting groups etc.

1.19. Re-use routings

When you add a routing to an item, through one of the methods available, CadConnect will as default create a new routing with the same number as the item number and add a reference on the item to this new routing.

If you want to re-use existing BC routings and you do not wan a new "identical" routings created, you can select this option.

In that case selecting an existing routing on a CadConnect line will add a routing to the item, but maintain the routing number. That is, no new routing will be created and the item will be adding a reference to the selected existing routing.

1.20. Do not explode existing routes

When you add a routing to an item, by selecting an existing routing, CadConnect will as default create new lines showing each operation from the routing. When you select this option the routing number will be saved as the Routing Template on the CadConnect item, and no operation lines will be added. When the item is being created the item will be added as a reference to this selected existing routing.

1.21. Routing Prefix

When adding a routing in CadConnect, this will normally be assigned the same number as the Item number it is attached to.

You can by this value here add a Prefix to the number.

E.g. if you have setup Routing Prefix to be "R-" and you have an item number 12345, then if you create a routing for that item in CadConnect it will get the number "R-12345".

1.22. No. of digits in Operation No.

This parameter refers to the BC Operation No. and will be used when you create routing operations from CadConnect.
E.g. if you setup this value to be 4, you operations will get the numbers 1000, 2000, 3000 etc.

1.23. More than 9 oper. on a routing

This parameter relates to "No. of digits in Operation No.". If you know that you may have more than 9 operations on a single routing, then you must select this value. As a result the first operation numbers will get a 0-prefix, that is if you use 4 digits, then your operations will get the numbers: 0100, 0200, 0300 etc. continuing with 0900, 1000, 1100 and so on.

1.24. Approve routes/BOMs automatically

You need to decide if the newly created BC BOM's and/or Routings will be certified, or stay in another status during the creating process.

1.25. Use versions

A checkmark in this field allows you to run with version control on items, BOM's and routings.

1.26. Item version attribute

If you want to have imported version codes added to new items as an attribute value, you can assign an item Attribute set for this here.

You can read more about the use of Item Attributes her: Item Attributes

1.27. Item version attribute name

When you have selected an attribute for item versions, the BC name for that attribute will be shown here for reference.

1.28. License key – CadConnect

Here you enter/paste a new NAVEKSA licence key when neccasary.

1.29. CadConnect menu item

Using Dimensions

The general idea is to be able to extend items created through CadConnect with values for different existing Dimension values.
Setup is made from the CadConnect Setup page:

You can set up until 8 different Dimensions. Purpose of the Setup is to map Imported values with a specific BC Dimension.
You must supply CadConnect Dimension number with a sequential number starting with 1. Then you select the BC Dimension you want in CadConnet and the name of that Dimension is shown automatically.

When you run the Import, you will be presented a new section with new fields according to the set-up of Dimensions and you can specify where in the File your Dimension values are:

CADCONNECT EXCEL DATA IMPORT

Variant 3 · · · · · · · · · · · · · · · ·

Variant Description 3 · · · · · · · ·

Variant 4 · · · · · · · · · · · · · · · ·

Variant Description 4 · · · · · · · ·

Variant 5 · · · · · · · · · · · · · · · ·

Variant Description 5 · · · · · · · ·

Variant 6 · · · · · · · · · · · · · · · ·

Variant Description 6 · · · · · · · ·

Variant 7 · · · · · · · · · · · · · · · ·

Variant Description 7 · · · · · · · ·

Variant 8 · · · · · · · · · · · · · · · ·

Variant Description 8 · · · · · · · ·

Dimensions

Afdeling · · · · · · · · · · · · · · · ·   L

Afdeling Name · · · · · · · · · · · ·   M

Debitorgruppe · · · · · · · · · · · ·   N

Debitorgruppe Name · · · · · · ·

CADCONNECT ITEM | WORK DATE: 06-04-2020

C0000002

| Process | Import | Copy | Update | | Actions | Fewer options |

| Copy ∨ | Update ∨ | 🔧 Structure | 🔲 Compare | 🔧 Calculation | Navigate ∨ |

💬 Main BOM Comments

🔧 Item Variants

⚡ Dimensions

No. ·   C0000002

Item No. ·   **YI-TECH-16**

Description ·   NAV demo item

After the import you can see the Dimension values from the Dropdown-functions in the header as well as in the lines and you have the possibility to modify the values if needed.

Creation of new items from CadConnect to BC will copy and add the dimension values as Default Item Dimensions in BC.

2. ItemPlanning setup parameters

ItemPlanning Setup screen:

2.1. Include planning worksheet data

As default you can select to include planning worksheet order proposals and allocations.
This default can be overriden at execution time.

2.2. BOM calculation Gross/Net

You have the opportunity to make your shortage requirement calculations based on 2 different principles:
Gross or net.

Gross calculation is equal to: " *I do not care what I have in stock of the end-item and components. Tell me what I need to deliver a product*"

Net calculation is equal to: "*Take into consideration whatever I have in stock currently of the end-item and needed components*"

If "BOM Calculation Gross / Net" is set to Gross, the BOM calculation of the requirements and calculated future stock requirements on component lines are based on the full required amount quantity, and does not take into account available physical quantity in stock for the end-item and components.

Gross calculation example:

You ask for 10 pieces of the end item no. FX-42

Inventory is 10 pieces on item no FX-42. Anyway the physical stock, the calculations are based on you want this quantity in addition to the physical stock.

The calculations are based on your need for 10 pieces and does not take any physical stock into account neither at the end-item level nor at the component level.

ItemPlanning - BOM

General

No.:	FX-42
Description:	NAV demo item
Description 2:	
Active Version:	
Required Quantity:	10
Required Date:	26-01-2018
Inventory on Location:	10
Qty. in Prod.order:	10
Qty. to build:	0

Critical items

Available Date (mat.)	04-02-2018
Available Date (cap.)	30-01-2018
Explode:	Single level BOM
Show component lines short on required date only:	☐
Show component lines short only - all dates:	☐
Show Repl.System:	All
Show Planning Worksheet data:	☑

Lines

Line ▾   Find

Component / Operation	Description	Vendor / Center	Le...	Repl. Syste...	Expl... BOM	Expl... Route	BOM / Route Qty	BOM Demand	Select for Crea...	Calculated Free Stock	Actual Stock	Qty in Purchase Order
TESTING12	Fabricated item	01905777	1	Purch...	☐	☐	1	10	☐	*-10*	0	
MV2529	Fabricated item		1	Prod....	☑	☐	1	10	☐	0	10	
RV298313	Purchased component		2	Purch...	☐	☐	2	20	☐	*-50*	0	
434719	Purchased raw material		2	Purch...	☐	☐	0,3	3	☐	*-9*	0	
3466	Purchased component	01863656	1	Purch...	☐	☐	1	10	☐	*-10*	0	

If "BOM Calculation Gross / Net" is set to Net, existing available stock are deducted at the end-item level and component lines.

More precisely the net calculations starts working when you have used up the available physical inventory on the end item and components lines.

Net calculation example:

You ask for 10 pieces of the end item no. FX-42

Inventory is 10 pieces on item no FX-42. This stock figure is subtracted your wanted quantity before any component lines calculations are made.

ItemPlanning - BOM

General

No.:	FX-42
Description:	NAV demo item
Description 2:	
Active Version:	
Required Quantity:	10
Required Date:	26-01-2018
Inventory on Location:	10
Qty. in Prod.order:	10
Qty. to build:	0

Critical Items

Available Date (mat.)
04-02-2018

Available Date (cap.)
25-01-2018

Explode:	Single level BOM
Show component lines short on required date only:	☐
Show component lines short only - all dates:	☐
Show Repl.System:	All
Show Planning Worksheet data:	☑

Lines

Line ▾ Find

Component / Operation	Description	Vendor / Center	Le...	Repl. Syste...	Expl. BOM	Expl. Route	BOM / Route Qty	BOM Demand (Shortage)	Select for Crea...	Calculated Free Stock (Shortage)	Calculated Total Stock (Shortage)	Actual Stock	Qty in Purchase Order
TESTING12	Fabricated item	01905777	1	Purch...	☐	☐	1	0	☐	0	-10	0	
MV2529	Fabricated item		1	Prod...	☑	☐	1	0	☐	10	10	10	
RV298313	Purchased component		2	Purch...	☐	☐	2	0	☐	-30	-40	0	
434719	Purchased raw material		2	Purch...	☐	☐	0,3	0	☐	-6	-8	0	
3466	Purchased component	01863656	1	Purch...	☐	☐	1	0	☐	0	-10	0	

Please be aware of the following using net calculations:

Lines

Line ▾ Find

Component / Operation	Description	Vendor / Center	Le...	Repl. Syste...	Expl. BOM	Expl. Route	BOM / Route Qty	BOM Demand (Shortage)	Select for Crea...	Actual Stock	Calculated Free Stock (Shortage)
TESTING12	Fabricated item	01905777	1	Purch...	☐	☐	1	2	☐	0	*-2*
MV2529	Fabricated item		1	Prod...	☑	☐	1	2	☐	12	10
RV298313	Purchased component		2	Purch...	☐	☐	2	0	☐	0	-30
434719	Purchased raw material		2	Purch...	☐	☐	0,3	0	☐	0	-6
3466	Purchased component	01863656	1	Purch...	☐	☐	1	2	☐	0	*-2*

You have asked for 12 pieces of the end item.
The calculation finds out that you have 10 pieces in stock.
So the net requirement is 2 on the end item.
On the component MV2529 you have 12 pieces in stock. Therefore exceeding the requirement of 2 pieces.

So the rationale is to use existing stock before issuing any make orders recommendations for making orders.

Therefore you see red negative figure lines (make orders related this item). But also you see black negative figures which are related to requirements from other purposes requirements.

2.3. Show item line if prevent negative is = No

Used for floor stock items you do not want to see in the ItemPlanning display screens.

2.4. Use Item Type in ItemPlanning

You have the possibility to exclude Non-Inventory items from ItemPlanning.
To do so this parameter must be changed from "All" which is the default value
to "Inventory".

2.5. Current production forecast

Which sales forecast is the current one in the calculations?
You must make sure that this value is the same as in the BC Manufacturing setup.

2.6. Current MRP worksheet

Select the wanted operating version of your planning worksheet.

2.7. Automatic re-calculation ItemPlanning

This is used by the ItemPlanning BOM planning. When having huge – multi-level bill of materials you can choose to re-calculate not interactively, but when you click the re-calcilate button.

2.8. Enable ItemPlanning log

This is a technical BC thing. If errors are encountered NAVEKSA useds this log function as a debugging tool.
It should never be activated unless told to.

2.9. Show service orders

Do you want to show and include service order item requirements in the calculations.

2.10. Show blanket orders

Must blanket orders (sales and purchase) be included in the calculations.

2.11. Sales order status open

Must sales orders with the status "open" be included in the calculations.

2.12. Sales order status pending approval

Must sales orders waiting for approval be included in the calculations.

2.13. Sales order pending pre payment

Must sales orders waiting for prepayment be included in the calculations.

2.14. Purchase order status open

Must purchase orders with the status "Open" be included in the calculations.

2.15. Purchase order status pending approval

Must purchase orders with the status "Waiting for approval" be included in the calculations.

2.16. Purchase order status pending pre payment

Must purchase orders waiting for for payment be included in the calculations?

2.17. Service order status pending

Must service orders with the status "Pending" be included in the calculations.

2.18. Service order status on hold

Must service orders with the status "On hold" be included in the calculations.

2.19. Production order status

What types of production orders – released, planned, or fim planned do you want to be shown and included in the calculations.

2.20. Show assembly quotes

Must quotes on assembly items be shown and included in the calculations.

2.21. Blank location ('') = Show all

Use the '' notation for showing all locations simultaneously.

2.22. Use forecast on location

Is the forecast used in relation to a location, and which.

2.23. Default location

Using a default location means that orders created will be raised against the default location and default bin location if this is present.

Please observe that if you want to display data for a specific location when making an inquiry on Items, the default location is picked up from the Itemplanning setup.
Using the other tools – Itemplanning BOM and Assembly you must select location etc. yourself using the standard NAV function "Limit totals" to delimit.

2.24. License key – ItemPlanning

Here you enter/paste a new NAVEKSA licence key when necessary.

2.25. ItemPlanning menu item

When clicking the menu you have the option to 'Exclude Item Categories':
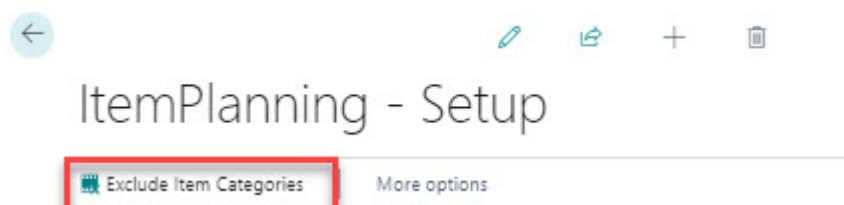
Through this menuitem you can select one or more Item categories, which should be excluded from being shown in ItemPlanning.

This could be Item Categories attached to small or cheap items which you give little focus and don't want to follow intensively in ItemPlanning.

3. ShopFloor setup parameters

3.1. Order status

Select what orders you want to work on and see in ShopFloor planning:

- Released,
- Released + Firm planned
- Released + Firm planned + Planned

3.2. Show arriving operations

If this box is activated, the order stack "Arriving" is shown on the operator SHOPFLOOR screen, too.

If the box has not been check marked, only "Processing" and "Queuing" operations are shown as default.

Note: All 3 order stacks are always shown on the planning screen.

3.3. Show setup and run

If this box is activrated, for each order stack – the remaining processing (Queuing and Future orders), the time left, is shown for respectively setup and labor.

The times shown are the accumulated value of the order routings,which can be seen on the screens.

3.4. Placement 1. operation

When a production order is released, this choice determines, whether the first production order routing operation on this route should be placed in the order stack

- Queuing
- Future Orders.

3.5. Sorting date

Sorting date) specifies how the sequence of the order stack will be in the different sections..

It is possible to choose the sequence based on one of 4 criteria:

- Start date of the production order.
- Start date of the production order routing operation step.
- Due date for production order routing operation step.
- Due date for the production order.

3.6. Placement send-ahead

The choice in this box determines (if you are using NAV send-ahead) in which order stack send-ahead operations have to be placed.

Either it will be placed in the "PROCESSING" stack for next subsequent routing operation or in the "QUEUING" stack for the subsequent operation.

3.7. Next operation start

When reporting an operation as finished, this check mark determines, if the subsequent order routing operation should be moved to

- Processing (Running)
- Waiting (Ready)

You may say that at the completion of an order routing step, considers the following operation to be moved and ready for processing at the next routing step.
Or you may say that completion of a production routing operation does not automatically launch the subsequent order operation status "Queuing", but that this status changes from "Queuing" to "Processing" must be initiated by the operator.

3.8. Production resource relation

You must specify which resources can be active on a job:

- User-id
- Employee
- Resource
- Machine center
- Employee + resource
- Emplyoee + machine center

When starting a job and ending a job, the employee/machine or resource must be identified.

3.9. Prod.res.can be active on more than one job

Yes / No to the possibility of a resource running more than one job simultaneously.

3.10. Output journal template name

This field specifies the name of the output journal type to be used for job transactions. Look-up is

available to access the BC defined journal types.

3.11. Output journal batch name

This field specifies the name of the output journal name to be used for job transactions. Look-up is available to access the BC defined journal names.

3.12. Consumption journal template name

This field specifies the name of the consumption journal type to be used for job transactions. Look-up is available to access the BC defined journal types.

3.13. Consumption journal batch name

This field specifies the name of the consumption journal name to be used for job transactions. Look-up is available to access the NAV defined journal names.

3.14. Show "No material use was sent" message

If you end a job and materials have not been issued, a warning message is send to the display.

3.15. Show warning if output quantity is too high

If this box is activated, a warning message will appear if you try to report a number of items consumed that exceeds the expected number, according to the production order line.

3.16. Post output journal when posting NAVEKSA cap. ledger

Enabling this function will automatically transfer ShopFloor transactions to the BC output journal. Codeunit 6170493, ShopFloor – Automatic Post shall be run via a BC JobScheduler to make the automation work.

A piece of advice: Normally new installations run the posting procedures manually a month or 2 until people have learned the system, and thus provide error free transactions. And then you automate.

3.17. Post output automatically

Enabling this function will automatically post the output journal.
Codeunit 6170493, ShopFloor – Automatic Post shall be run via a BC JobScheduler to make the automation work.
A piece of advice: Normally new installations run the posting procedures manually a month or 2 until people have learned the system, and thus provide error free transactions. And then you automate.

3.18. Job time calculation

- According to estimated time
- According to estimated quantity

[Click here to read more about distribution methods](#)

3.19. Calendar based job working hours

In this field you tell the system, if the calculation of actual operation time shall be based on the NAV production calendar.

3 options are available:

- Total work hours
- Total works deducted breaks
- Production calendar work time deducted breaks

3.20. Only assign one lot number at a time by output

If this field is highlighted, just one lot number is assigned per production order line. The number will be assigned in advance.

3.21. Block output if end time is in the future

If this field is highlighted, the operator can report an output later on, than the time current time.
To be used when manual ending time is active on the resource.

3.22. Output – Calculate suggested quantity

Use this option to fill the the field with expectexted output quantity, or leave it blank for manual entry.

3.23. Show QC button in ShopFloor

Turn this on to show a QC function button on the execution client

3.24. QC software

Select what QC reporting software you will be using.

3.25. Show process note on start job

If active an a process note that exists for the order operation will show up as default when starting this order operation.

3.26. Chek materials in planning

If this has been activated, a material availability check will be made, when changing the priority forwards for a production order.

Values to choose from:

Blank = No check
Confirm = A message is send if shortages
Block = Priority cannot be changed if shortages exist

3.27. Check materials on ShopFloor start

If this has been activated, a material availability check will be made, when starting a production order.

Values to choose from:

Blank = No check
Confirm = A message is send if shortages

3.28. Check materials on ShopFloor materials

If this has been activated, a material availability check will be made, when issuing components/raw materials against a production order.

Values to choose from:

Blank = No check

Confirm = A message is send if shortages

3.29. Material check ignore boundary in %

When operators start putting small weird percentages as material waste or adding components with eg 0.001 pcs,
it is easy for the operator to correct if there are a number of components they often use instead of add and look for them.

3.30. Start job without issuing materials

Shall it be possible to start a job with component shortages.

3.31. Show warning when outputting without materials issue

Is it possible to report output quantities without having issued materials.

3.32. End job without issuing materials

Is it possible to end a production order without having issued materials.

3.33. Variable material issue

Variable material consumption deals with the non-standard BOM component issue (adding components to a production order.

3.34. Post consumption automatically

Enabling this function will automatically post material consumption in BC.
Codeunit 6170493, ShopFloor – Automatic Post shall be run via a BC JobScheduler to make the automation work.
A piece of advice: Normally new installations run the posting procedures manually a month or 2 until people have learned the system, and thus provide error free transactions. And then you automate.

3.35. Print method – Labels, cards, sheets etc.

You have a choice of 2 different print options
From ShopFloor client

From BC client

The difference is xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

3.36. Use barcode reports

Activatingthis field enables the ShopFloor bar code scanning options in various areas.

3.37. Autoprint barcode reports

When activated bar coded reports are printed when you release a production order.

3.38. Job report numbers

This is the BC report number for a various reports.You can do a look-up to the BC object list and select the appropriate one..

3.39. Prioritising allowed

Is the planner allowed to manually assign priorities and change the order sequence.

3.40. Change priority on active orders

In this field you specify whether it is allowed to change priority on orders, which have one or more processing operations.
You could have restrictions that this is not allowed, due to order pallet sequence or for other reasons.

3.41. Auto-release to ShopFloor

In this field you have to specify whether orders are automatically released to the operator screen, when releasing a production order in BC.

> ✱ IMPORTANT:
> If the box is not check marked, released orders are placed only at the ShopFloor planning screen for further scheduling.
> If the box is check marked, released orders are placed both on the planning screen and on the ShopFloor screen.

You can remove an order from the Operator screen by assigning the priority to status 1.

3.42. Planning horison – Arriving orders

If you run with many long term orders you can delimit the number of orders to be seen in the Arriving section by inserting a number of days in this field.

3.43. Operation assignment

Do you want to assign a routing operation using single or multiple resources.

3.44. WEB client URL

This is the URL to the web-client

How to find the webservice url?

Using Windows search write "Dynamics NAV / Dynamics 365 Business Central 201x web…"

You will get a screen like this:

Start the application. This will show this screen:

Copy the URL and paste it into the field "web client URL in the general setup:

General

Web Client URL: http://localhost:80...

3.45. Enable web service log

If this field is highlighted, all calls are logged to web service in a table in BC.
Please be aware that the amount of data can be even very large.
It is recommended primarily to use this function to track errors in the calls and not to be turned on in general.

3.46. Drawings placement

There are 3 options in this field:

• Production order link
• Item link
• Shared folder
• Combination

3.47. Path for drawings

Write the path to where your drawings are kept.
The path must be a shared UNC path which all the clients and the server can access.
The BC server instance user and client users must have read access to the shared folder/location,

3.48. Drawings – File extension

Here you write the extension for the file type to be shown. F.ex. .pdf

3.49. Drawings – Attribute ID

xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

3.50. Planning horison – Shopfloor

Here the general planning horizon in ShopFloor for queuing and processing orders is specified.

3.51. Start up language

Here you can select which language the client has to start up with.
The language can also be changed temporarily in the ShopFloor client.

3.52. Path for update directory

For future use.
Automatic update of the ShopFloor client. The path to the updated client has to be specified here.

3.53. Manual ending time entry

Shall it be possible to override job ending time with a user-entered or selected ending time.
p(banner tip). For logical reasons, please note that overriding the actual stamp times with manual start/ stop or total job time does not include deduction af break times in the calculation of job time.

3.54. Manual starting time entry

Shall it be possible to override job starting time with a user-entered / selected starting time.
p(banner tip). For logical reasons, please note that overriding the actual stamp times with manual start/ stop or total job time does not include deduction af break times in the calculation of job time.

3.55. Manual operation time entry

Shall it be possible to override job starting time and ending times with a user entered total job time.
p(banner tip). For logical reasons, please note that overriding the actual stamp times with manual start/ stop or total job time does not include deduction af break times in the calculation of job time.

3.56. Manual production resource entry

Shall it be possible to override a planned resource with a specific job execution resource?

> ✳ Example: A job is planned to a work center consisting of 15 individual machines capable of doing more or less the same process.
> The operator selects an appropriate machine for the job, and select and report the used machine at output reporting.

3.57. Periodic posting

Shall it be possible to report (depreciate) long run jobs with daily job time (24 hours) spend without ending the job?

3.58. Show in ShopFloor

For each production resource you must decide, whether this resource shall show up in the ShopFloor client (Show in ShopFloor).

3.59. Use in output journal

You must decide, if the machine center or operator cost price shall be used in the output journal instead of work centers rates (Use in output journal)

3.60. Calendar

You must assign a NAV calendar and a BC shift code to each resource.

3.61. Work shift

ou must assign a NAV calendar and a BC shift code to each resource.

3.62. License key – ShopFloor

Here you enter/paste a new NAVEKSA licence key when neccasary.

3.63. Use standard BC family orders

Use standard BC family orders

Standard family production orders has a one routing for the production of all the family items.
Some compnaies have changed this fuction to comprise an individual routing for each familiy item line.
So if yoy do not have this change, the answer should be Yes to this question.

4. MakeTo Order setup parameters

4.1. License key – MakeToOrder

Here you enter/paste a new NAVEKSA licence key when neccasary.

5. Time & Attendance setup parameters

5.1. List absence codes

If this code is active, you have to specify a code when clocking in, in case you do not arrive and leave at normal work start/end.

Please see further details regarding conditions for absence codes under "Absence code setting."

5.2. Auto start jobs on clock-in

Autostart means that a previous running job was paused when the operator left.

Now it automatically turns the job active again by clocking in.

5.3. Auto-end jobs on clock-off

This field has 3 settings:

- Yes
- No
- Select

If you select Yes, the employee's active job is ended, when clocking out.

If you select No, the employee's active job continues to run, when clocking out.

Chosing Select, the employee is asked to decide, whether active jobs must be stopped.

5.4. Days shown in overview

When clocking in and out, the employee can see an overview of his clocking in and clocking out hours, for all the number of days specified in the field.

5.5. Use different shop calendars for uneven weeks

xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

5.6. Automatically clock in on start job

This function automatically clocks in the operator when he starts a job.

5.7. Margins for work shift reason code

adjustments

- Margin before work shift start, where the absence code is not requested
- Margin after work shift start, where the absence code is not requested
- Margin before work shift end, where the absence code is not requested
- Margin after work shift end, where the absence code is not requested
- Margin before work shift start, where the absence code is required
- Margin after work shift start, where the absence code is required

Many companies work with flexible working hours, where the employees can decide within a certain time interval, when they come or go adding or subtracting time to their flex account.

If the working hours are usually from 7 am. to 15 p.m., but the employees have the opportunity to flex, between 6 am and 8 am and 14 and 16 p.m., they do not want to be prompted for an absence code within this interval.

Therefore, it is possible, in the time and attendance setup, to select that the employee will not be prompted for an absence code, if he for instance arrives between 6 am and 8 am, and leaves between 14 and 16 pm. In this case, the value in these fields is set to 60 minutes in the setup if the company defined working hours is 7:00 to 15:00.

The system needs to get information about, whether an employee arrives too late compared to previous work shift start, or arrives too early in relation to the next work shift start.

Conversely, at the end, whether the employee leaves too early, or too late. It is possible to specify this in these fields, as the content herein determines, whether you consider an employee being late or too early or leave too soon or too early. If you always want an employee to enter an absence code, if he arrives or leaves between a work shift end or a work shift start, you have to enter the number of total minutes, covering the period from end to start.

If the working hours end at 15 pm. and start at 7.pm the next day, you have to allocate 16 hours, corresponding to 960 minutes in these two fields.

However, the content in the previous fields prevail this setup, so that there is no absence code required within an hour before the start and after the end.

5.8. Show Time & Attendance in ShopFloor

Show the buttons for Time & Attendance on the ShopFloor client.

5.9. Custom report button

Add your own report for employee reporting.

5.10. Print report number

Add your own report for employee reporting.

Yes in this field adds a button to the time & attendance display,

5.11. License key – Time & Attendance

The license key for MakeToOrder is contained in the ShopFloor module.

This because the Time & Attendance is cannot stand on its own, but alway run together with the ShopFloor module.

6. How to use field wizard?

How to use field wizard?

Right to the field you find 3 dots.Clicking there pulls up field specific explanation.