



ORCHESTRA

Creating & Processing Production in the BMC

Practice Lab



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Terms & definitions

Barrel management console: The barrel management console in Orchestrated provides a central place for you to manage your barrels and liquids. It's designed to consolidate items so that the information in Orchestrated mirrors how you already track your inventory.

Home tab

The home tab is your place to execute daily production activities. It's built like any other worksheet in the Orchestrated. Along the top are filters for the list of production orders below. The production order is a step in filling and dumping barrels, both of which can be executed from this window.

Management tab

The management tab lists all your barrels with their current contents (if any) and associated data. There are a number of fields to filter the list by in case you have hundreds or thousands of barrels! You can select barrels from this list and perform several actions.

Setup tab

Before the barrel activities begin, some basic data must be setup! You can add and edit setup data as you continue to grow your business.



Tasks

Fill & dump barrels using the barrel management console

Add a new barrel shell item to IMD

1. Login to your OSpirits testing atabase
2. Open up Item Master Data
3. Switch to Add Mode
4. Enter code BRL2500-Filled
5. Description: Barrel - Oak 53 Gal - Filled
6. Check this item off to be an Inventory, Sales & Purchase Item
7. Set the Item Group to: RM Other
8. Set the Item to not be batch managed
9. Switch to the Warehouse tab
10. Add a barrel warehouse to this item: BA01
11. Set this warehouse to be the default
12. Click Add to add this item to IMD

Duplicate previous barrel shell item

1. Open up Item Master Data
2. Stay in Find Mode
3. Find & choose 'BRL' item you just created (BRL2500-Filled)
4. Right-Click and duplicate
5. Change code for new item to BRL2500-Used
6. Update Description to: Barrel - Oak 53 Gal - Used
7. Click Add to add this item to IMD
8. Switch back to Find Mode
9. Find & choose 'BRL' item you just created (BRL2500-Used)
10. Right-Click and duplicate
11. Change code for new item to BRL2500-New
12. Update Description to: Barrel - Oak 53 Gal - New
13. Click Add to add this item to IMD

Whenever adding new barrels to your inventory, there should always be 3 items (Filled, Used & New)

Add a new barrel type

1. Login to your OSpirits TESTING Database



2. Open up the Barrel Management Console
3. Head on over to the Setup Tab (Far right tab)
4. You can edit your Barrel Types, Sizes and Statuses when you get new barrels! For this lab, click edit at the top of Types section.
5. On the next available line, add in Char 4 for both code and description
6. Click Update

Add new barrel templates

1. It's now time to add in your barrel templates (these tie the shell & the liquid together)
2. Since you've already added the barrel items to Item Master Data, this will be pretty straightforward!
3. Click Edit above the Barrel Item Templates section
4. On the next available line, find the first barrel item: BRL2500-Filled
5. Enter ID Prefix: BRL
6. Enter Type: Char 4
7. Enter Size: Barrel 53
8. Enter Condition: Used
9. Enter Status: Filled
10. Click Update
11. Move to the next available line, find the next barrel item: BRL2500-Used
12. Enter ID Prefix: BRL
13. Enter Type: Char 4
14. Enter Size: Barrel 53
15. Enter Condition: Used
16. Enter Status: Empty
17. Click Update
18. Move to the next available line, find the next barrel item: BRL2500-New
19. Enter ID Prefix: BRL
20. Enter Type: Char 4
21. Enter Size: Barrel 53
22. Enter Condition: New
23. Enter Status: Available
24. Click Update

Create barrel aged production orders to fill barrels

25. Login to your OSpirits testing Database
26. Open up the Production Order function (Production > Production Order)
27. Create a Barrel Age Production Order
 - o Enter Product No (Code of the item you're making): BA1001
 - o Planned Quantity (How much are you making): 159 gallons
 - o Warehouse (What tank/warehouse is this going into): BA01
 - o Production Date (When is production supposed to occur): today's date



- Production Order will consume Barrel Proof Liquid (If there is not Barrel Proof Liquid in stock, complete and express Production Orders in order to bring more into stock)
28. Click <Add> to create Production Order
 29. Open up Barrel Management Console
 30. Navigate to the Home tab
 31. Set your filters to the correct dates on top
 32. Ensure you can view the Barrel Aged Production Order on the Home Tab

Express barrel age production orders

Open the Barrel Management Console (Production > Production Forms > Barrel Management Console)

1. Check that the Top of the sheet has the correct information
 - Home tab is activated
 - Location is correct
 - Status set to 'Planned/Released'
 - Start Date & End Dates are set to capture the dates assigned to your PdOs
2. Under the Production Orders table > click to highlight the Barrel Age PdO you are ready to process (you can tell by the Batch # and/or date): BA1001
3. Click <Fill Barrels>
4. The Upper section contains information on what you're making (receiving in to inventory)
5. The Lower section contains information on what you're using up (issuing out of inventory)
6. In the Upper section
 - Fill out Receive Qty (how much Barrel Age liquid you're receiving): 159
 - Fill out Proof: 100
 - Fill out Batch ID (if missing): PracticeBatch
 - Fill out Initials: your initials
7. In the Lower Section:
 - Activate the Barrel Selection tab
 - Choose the Barrels you will be filling
 - Click <Search> opens a list of available barrels to dump (Condition will be either 'New' or 'Used' and Status will be either 'Empty' or 'Available')
 - Hold Ctrl on your keyboard and highlight the rows for the barrels that will be filled: ORC-11, ORC-12 & ORC-13 (BRL2000-Empty)
 - Click <Select>
 - Ensure the total 'Fill Volume' matches the 'Receive Qty' from the upper section. (ie. if a barrel is only partially filled, update the Fill Volume column to reflect that): ensure each barrel is set to 53
8. Activate the Barrel Matching tab
 - Choose the barrel item that will be created once the PdO has been processed
 - Click the Created Barrel dropdown



- Choose the ending barrel item (If aging, the barrel item will change from 'New' or 'Used' to 'Filled'): Choose BRL2000-Filled
- 9. Activate the PdO Lines tab
 - Verify the component/material that will be issued from stock to fill the barrels (ensure the 'ActQty' column matches what you removed from a tank to fill your barrels. E.g. You might remove 107 gallons to fill two 53gal barrels. 1Gallons of liquid ended up on the floor during filling. You will update the 'ActQty' column to 107, because that's how much was issued out)
 - You should not have to make other edits on this screen, as you've already assigned everything else
- 10. Click <Process>
- 11. Review the Barrel Edit screen
 - Review the Barrel ID, the Status, the Contents and the new Batch #
- 12. Click <Submit>
- 13. Back on the Barrel Management Console:
 - Notice there are now 2 checkmarks next to the Barrel Aged PdO you just processed. This indicates the Barrel Age Liquid has been expressed and is now sitting in another tank/vessel.
- 14. Activate the Management tab to verify the barrels are now in stock
 - Search for the Batch ID of the Barrels you just filled ▪ You can Double-Click the Column Header to sort, or use the Filter icon
 - Drill into one of the barrels with the yellow arrow
 - Click <Show History>
 - Gives you history for that particular Barrel

Create barrel dump production orders to dump barrels

1. Login to your OSpirits TESTING Database
2. Open up the Production Order function (Production > Production Order)
3. Create a Barrel Dump Production Order
 - Enter Product No (Code of the item you're making): BD1001
 - Planned Quantity (How much are you dumping out of barrels): 159 gallons
 - Warehouse (What tank/warehouse is this going into): HT99
 - Production Date (When is production supposed to occur): today's date
 - Production Order will consume Barrel Aged Liquid sitting in barrels
4. Click <Add> to create Production Order
5. Open up Barrel Management Console
6. Navigate to the Home tab
7. Set your filters to the correct dates on top
8. Ensure you can view the Barrel Dump Production Order on the Home Tab



Express barrel dump production orders

1. Open the Barrel Management Console (Production > Production Forms > Barrel Management Console)
2. Check that the Top of the sheet has the correct information
 - o Home tab is activated
 - o Location is correct
 - o Status set to 'Planned/Released'
 - o Start Date & End Dates are set to capture the dates assigned to your PdOs
3. Under the Production Orders table > click to highlight the Barrel Dump PdO you are ready to process (you can tell by the Batch # and/or date): BD1001
4. Click <Dump Barrels>
5. The Upper section contains information on what you're making (receiving in to inventory)
6. The Lower section contains information on what you're using up (issuing out of inventory)
7. In the Upper section
 - o Fill out Receive Qty (how much Barrel Dump liquid you're receiving): 159
 - o Fill out Proof: 100 o Fill out Batch ID (if missing): PracticeBatch
 - o Fill out Initials: your initials
 - o Fill out 'Receive Shells To' (where will shells should now be located): BA01
8. In the Lower Section:
9. Activate the Barrel Selection tab
 - o Choose the Barrels you will be dumping
 - o Click <Search> opens a list of available barrels to dump
 - o Hold Ctrl on your keyboard and highlight the rows for multiple barrels: Choose 3 barrels to dump
 - o Click <Select>
10. Activate the Barrel Matching tab
 - o Choose the barrel item that will be created once the PdO has been processed
 - o Click the Created Barrel dropdown
 - o Choose the ending barrel item (If dumping, the barrel item will change from 'Filled' to 'Used')
11. Activate the PdO Lines tab
 - o Verify the component/material that will be issued from stock to fill the barrels
 - o You should not have to make edits on this screen, as you've already assigned everything
12. Click <Process>
13. Review the Barrel Edit screen
 - o Review the Barrel ID, the Status, the Contents and the new Batch #
14. Click <Submit>
15. Back on the Barrel Management Console:



- Notice there are now 2 checkmarks next to the Barrel Dumped PdO you just processed. This indicates the Barrel Dump Liquid has been expressed and is now sitting in another tank/vessel.
16. Activate the Management tab to verify the barrels have changed status
- Search for the Batch ID of the Barrels you just filled
 - You can Double-Click the Column Header to sort, or use the Filter icon
 - Drill into one of the barrels with the yellow arrow
 - Click <Show History>
 - Gives you history for that particular Barrel

Close production orders

1. Open PdO Close Wizard (Production > Automation > PdO Close Wizard)
2. Change the 'Status' dropdown to Received (indicates you've received the product already, and the PdO can be closed)
3. Sort by Prod Date or Batch to find the recent Production Orders you've expressed
4. Checkoff all applicable PdOs
5. Click <Close> <Yes>
6. Closing the Production Orders allows for the cost of producing items to be finalized and any variance to be posted to a Production Variance account. This step is crucial so the cost of items is properly adjusted to reflect what it actually cost you to make each item. You will want to close your production orders as soon as you are done with each step in Production.