



# **ORCHESTRA** **OCloud Production**

Part 1 of 3

**This guide will introduce you to the concepts, basics and main processes of Orchestrated Production. Let's get Brewing!**



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# Production concepts

## Overview

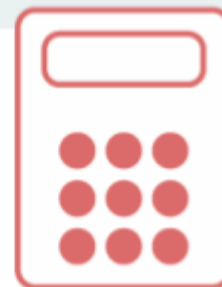


The production process is when making your Beer happens! OBEER will be there by your side as you plan what needs to be brewed, and execute on that plan. The software follows your day to day on the floor, so you know what stage your liquid product is at, where your liquid is located, and the next steps to take. OBEER is an inventory management system. This means that inventory has to be consumed, in order to make more inventory:

**For Example:** during brewing, raw materials such as malts and hops are consumed by wort. During fermentation, wort is consumed by green beer. During filtration, green beer is consumed by a dry hop, and then the dry hop is consumed by Brite beer. Eventually, Brite beer will be consumed by packaging. And finally, finished product will be enjoyably consumed by your Customers!

### Why Produce through OBEER?

Gives your business visibility into the components used to create beer, retains your tried and true recipes, impacts inventory, captures TTB information, ties heavily into the financial impact your produced goods have on your business.





## Process flow



OBEER Production is broken out into two main processes:  
**Planning & Expressing**

### PLAN

Standing instructions to create your end product at each step

Includes when it needs to be made (how long it will take)

Includes what components/ingredients will be used

Does NOT impact inventory



### EXPRESS (CREATE)

Reads and then creates the plan

Physical consumption of previous step

Inventory is moved between Warehouses

Issues-out and receives-in components/ingredients

Impacts inventory

Impacts financials





## Terminology

**PROCESS** – Method in which you're trying to create an item (liquid)

*Brewing | Fermentation | Optional Steps | Filtration | Packaging*

**COMPONENTS** – Materials being used during each process

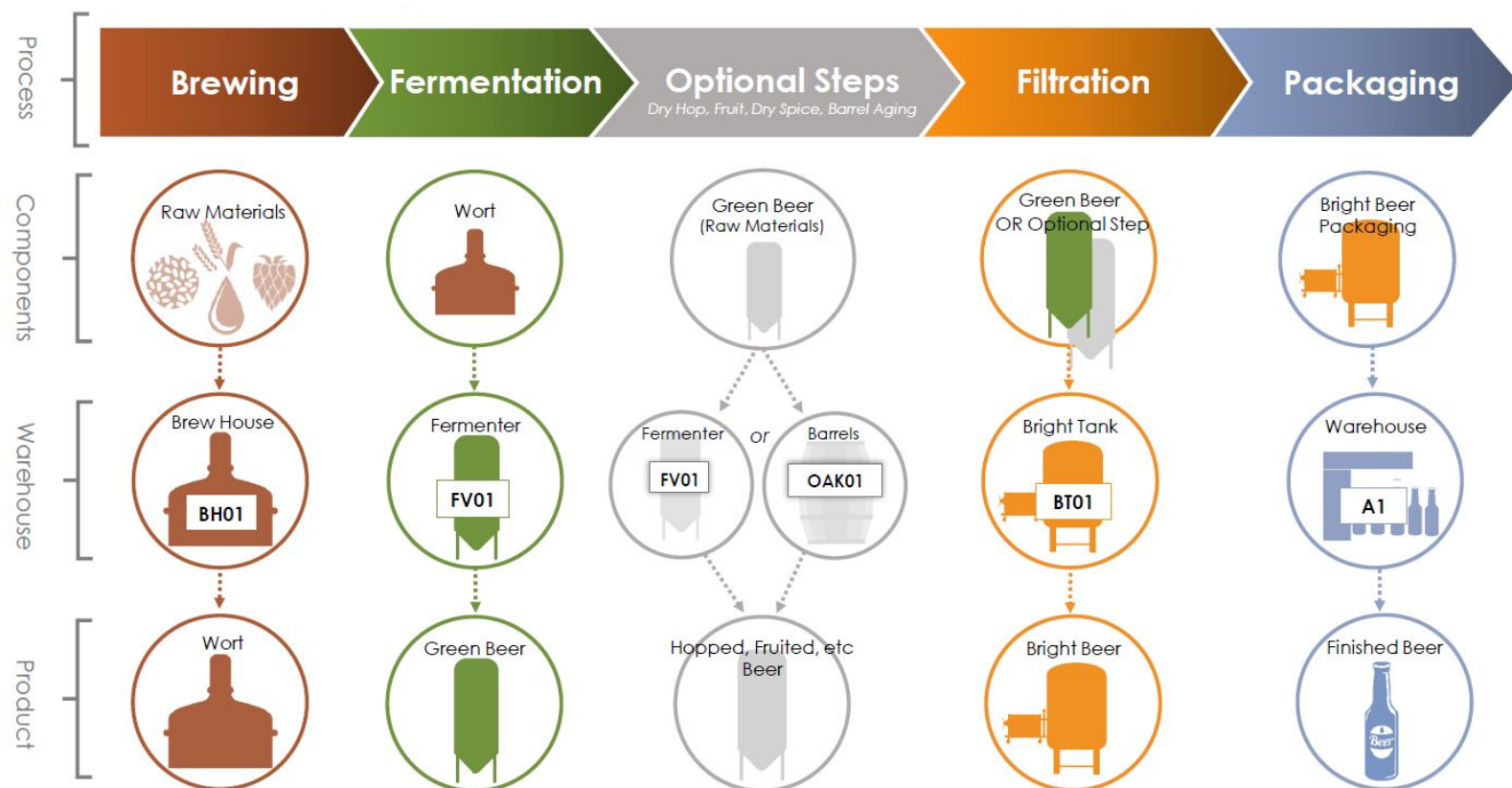
*Raw Materials | Wort | Green Beer | Optional Step | Brite Beer | Packaging Materials*

**WAREHOUSE** – Location of components

*Brew House | Fermenter | Barrels | Brite Tank | Main Warehouse*

**PRODUCT** – The end item being produced

*Wort | Green Beer | Dry Hopped Beer | Brite Beer | Finished Beer*





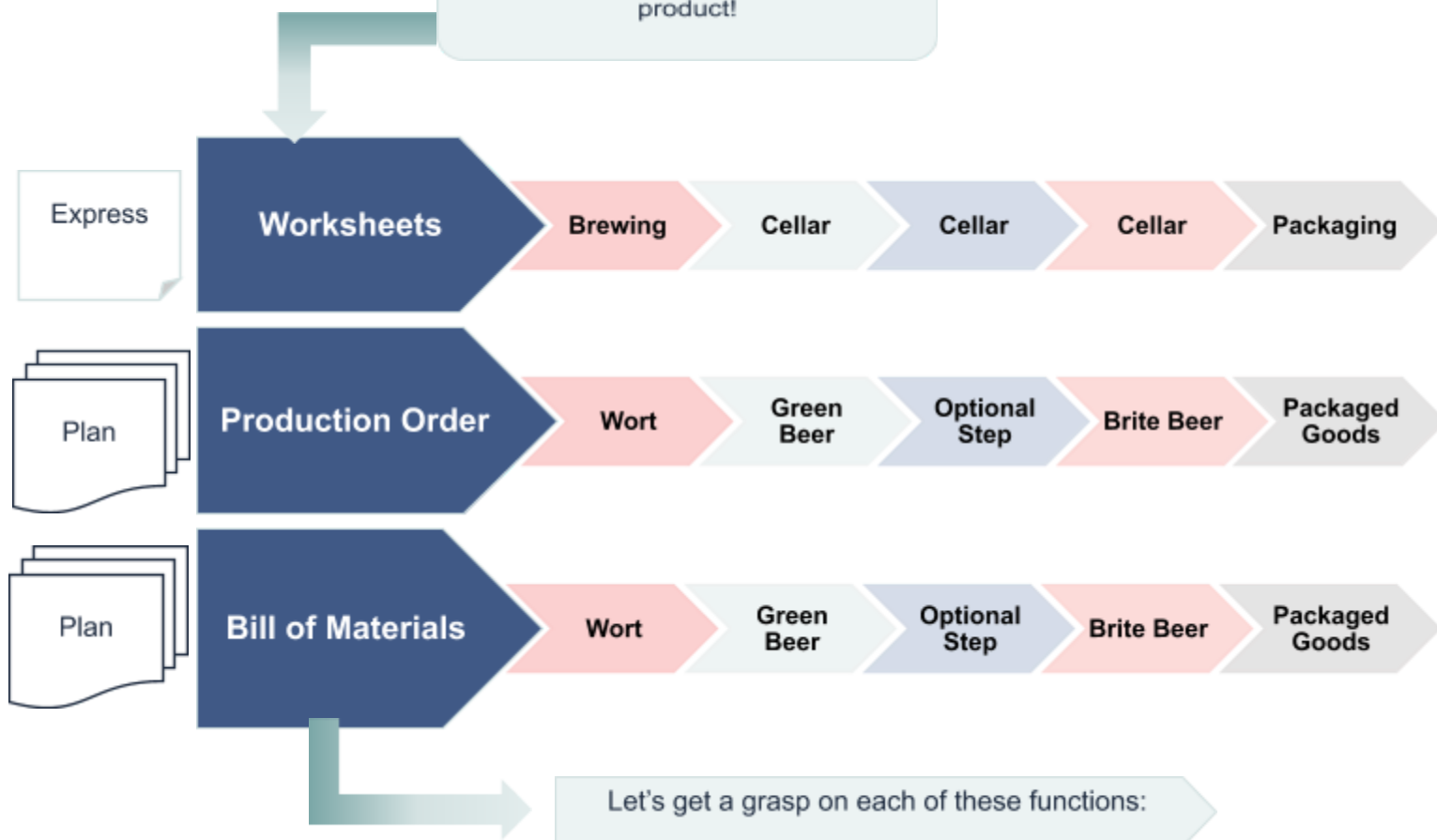
# Production basics

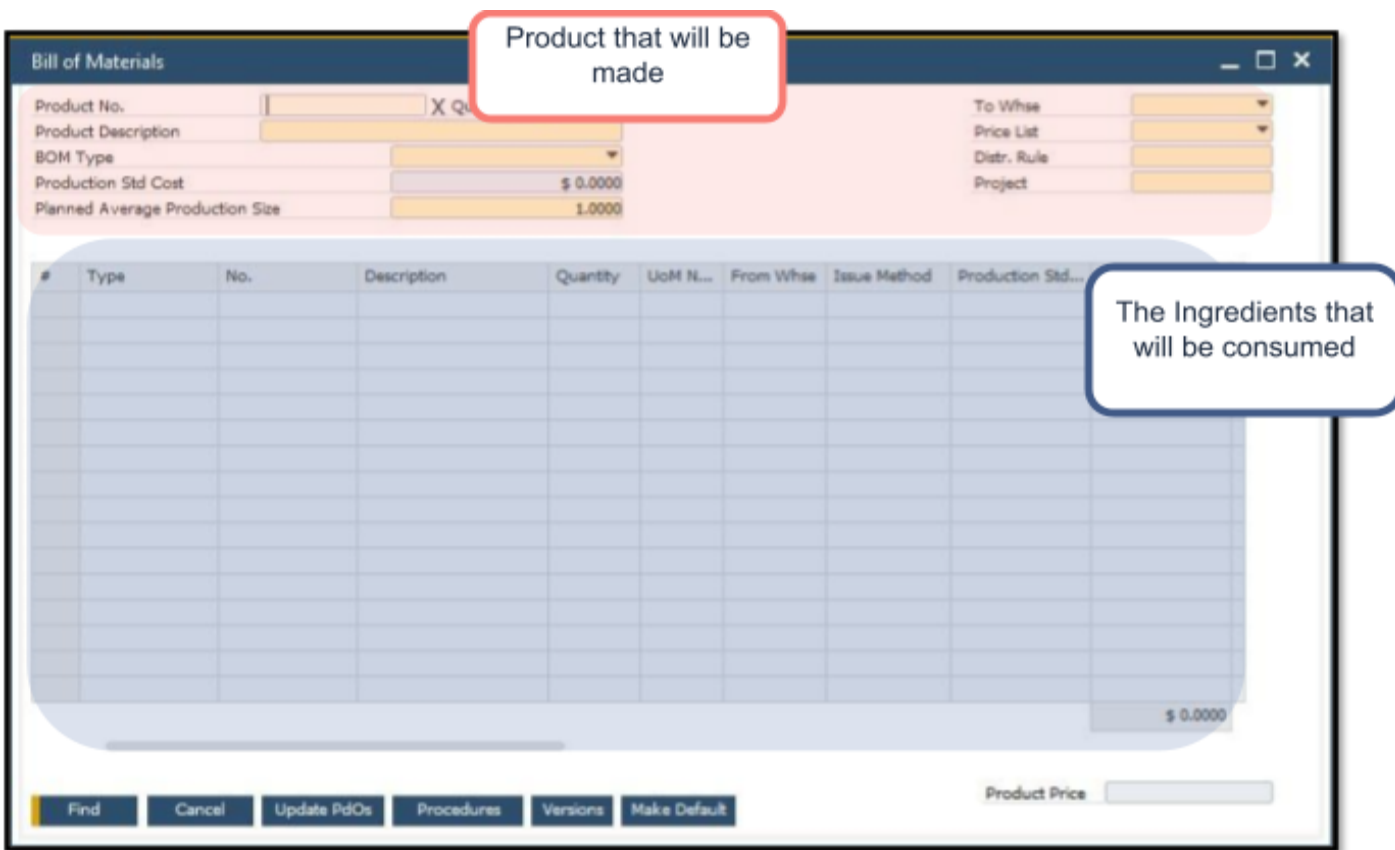
## Production flow

What do we use in OBEER to make Production happen?



Great question! There will be 3 main functions that impact each process & product!







## Finding a BoM

Item Master Data > Find Item (i.e. Wort) > Right Click > Bill of Materials

**Item Master Data**

Item No. Manual W1001 Active ☒ Inventory Item  
Description Wort - Amber Ale  
Foreign Name  
Item Type Items Brand 1001  
Item Group WSP: Wort Pack Type UoM - BBL  
UoM Group Manual Bar Code  
Price List CA-North Unit Price Primary Cum  
Process Type Brewing (Beer)

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments Batches

☒ Tax Liabile  
☐ Do Not Apply Discount Groups  
Manufacturer - No Manufacturer -  
Additional Identifier AMA  
Shipping Type Distributor Truck  
Serial and Batch Numbers  
Manage Item by Batches  
Management Method On Every Transaction

**Bill of Materials**

Product No. W1001 X Quantity 30  
Product Description Wort - Amber Ale  
BOM Type Production  
Production Std Cost \$ 0.0000  
Planned Average Production Size 1.0000

#	Type	No.	Description	Quantity	UoM N...	From Whse	Issue Method	Production Std...	Total Production...
1	Item	RM2007	Amber	600	lb	A1	Manual	\$ 0.0000	\$ 0.0000
2	Item	RM2014	C-120	100	lb	A1	Manual	\$ 0.0000	\$ 0.0000
3	Item	RH2009	Citra	10	lb	A1	Manual	\$ 0.0000	\$ 0.0000
4	Item	RH2006	Cascade	5.5	lb	A1	Manual	\$ 0.0000	\$ 0.0000
5	Item							\$ 0.0000	\$ 0.0000

OK Cancel Update P&Os Procedures Versions Make Default

### Navigation Tip!

You can also drag and drop the Bill of Materials function into your Common Functions box:

Modules > Production > Bill of Materials

### Real Life!

Bruno wants to double check his recipe for Amber Ale Wort (W1001)

Let's take a closer look with Bruno







## BoM 411

Product that will be made

How many BBLs are made with this recipe?

Where will my product reside?

Product that will be made

How many BBLs are made with this recipe?

Where will my product reside?

Where will my product reside?

Recipe Ingredients that will be consumed

Update all (carbon co BoM) w ingredient

Take Note! Any BoM after Wort (i.e. Dry Hop & Packaging) should consume the liquid as the

Bill of Materials

Product No. W1001  
Product Description Wort - A  
BOM Type Production  
Production Std Cost \$ 0.0000  
Planned Average Production Size 1.0000

To Whse BH01  
Price List CA-North  
Distr. Rule  
Project

Bill of Materials

Product No. W1003  
Product Description Wort - IPA  
BOM Type Production  
Production Std Cost \$ 0.0000  
Planned Average Production Size 1.0000

To Whse BH01  
Price List CA-North  
Distr. Rule  
Project

#	Type	No.	Description	Quantity	UoM N...	From Whse	Issue Method	Production Std...	Total Production...
1	Item	RM2005	2-Row Bulk	1,000	lb	A1	Manual	\$ 0.0000	\$ 0.0000
2	Item	RM2028	Maris Otter supersack	200	lb	A1	Manual	\$ 0.0000	\$ 0.0000
3	Item	RM2024	C-45	100	lb	A1	Manual	\$ 0.0000	\$ 0.0000
4	Item	RH2006	Cascade	1	lb	A1	Manual	\$ 0.0000	\$ 0.0000

Bill of Materials

Product No. GB1003  
Product Description Green Beer - IPA  
BOM Type Production  
Production Std Cost \$ 0.0000  
Planned Average Production Size 1.0000

To Whse F99  
Price List CA-North  
Distr. Rule  
Project

#	Type	No.	Description	Quantity	UoM N...	From Whse	Issue Method	Production Std...	Total Production...
1	Item	W1003	Wort - IPA	1	BBL	BH01	Manual	\$ 0.0000	\$ 0.0000

Bill of Materials

Product No. DH1003  
Product Description Dry Hopped Beer - IPA  
BOM Type Production  
Production Std Cost \$ 0.0000  
Planned Average Production Size 1.0000

To Whse F99  
Price List CA-North  
Distr. Rule  
Project

#	Type	No.	Description	Quantity	UoM N...	From Whse	Issue Method	Production Std...	Total Production...
1	Item	GB1003	Green Beer - IPA	1	BBL	F99	Manual	\$ 0.0000	\$ 0.0000
2	Item	RH2009	Citra	1	lb	A1	Manual	\$ 0.0000	\$ 0.0000

Bill of Materials

Product No. BB1003  
Product Description Bright Beer - IPA  
BOM Type Production  
Production Std Cost \$ 0.0000  
Planned Average Production Size 1.0000

To Whse B99  
Price List CA-North  
Distr. Rule  
Project

#	Type	No.	Description	Quantity	UoM N...	From Whse	Issue Method	Production Std...	Total Production...
1	Item	DH1003	Dry Hopped Beer - IPA	1	BBL	F99	Manual	\$ 0.0000	\$ 0.0000

Bill of Materials

Product No. 1003-K12  
Product Description IPA - Keg 1/2 BBL  
BOM Type Production  
Production Std Cost \$ 0.0000  
Planned Average Production Size 1.0000

To Whse A1  
Price List CA-North  
Distr. Rule  
Project





## Editing a BoM



### Real Life!

Bruno notices his recipe for his IPA needs to be changed. He'll no longer be using Fuggie hops, but rather German Tradition hops. Let's take a look at how he goes about editing his BoM!

Bruno begins by opening his BoM for W1003 (Wort – IPA)

#	Type	No.	Description	Quantity	Unit	From Whse	Issue Method	Production Std.	Total Production	Price List	Unit Price
1	Item	RH2005	2-Row Bulk	1,000	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
2	Item	RH2028	Maris Otter supersack	200	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
3	Item	RH2024	C-45	100	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
4	Item	RH2006	Cascade	50	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
5	Item	RH2012	Fuggie	1	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
6	Item	RH									

#	Item No.	Item Description	In Stock
5	RH2009	Citra	9,980
6	RH2010	Cluster	10,000
7	RH2011	Columbus	10,000
8	RH2012	Fuggie	10,000
9	RH2013	Galena	10,000
10	RH2014	German Tradition	10,000
11	RH2015	Glacier	10,000
12	RH2016	Golding	10,000
13	RH2017	Hallertauer Herzbrucker	9,982
14	RH2018	Liberty	9,970

Bruno's next step is to add his new hop variety (German Tradition hops) He searches by item code to bring up his list of items, and once item is found, selects <Choose>

Now that the German Tradition hops are added to his BoM, he needs to remove the Fuggie hops



Bill of Materials

Product No.  X Quantity

Product Description

BOM Type

Production Std Cost

Planned Average Production Size

To Whse

Price List

Distr. Rule

Project

#	Type	No.	Description	Quantity	UoM N...	From Whse	Issue Method	Production Std...	Total Production...	Price List	Unit Price
1	Item	RH2005	2-Row Bulk	1,000	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
2	Item	RH2028	Maris Otter supersack	200	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
3	Item	RH2024	C-45	100	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
4	Item	RH2006	Cascade	50	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
5	Item	RH2012	Fuggie	1	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
6	Item		German Tradition	1	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
7											

Copy  
Copy Table  
Maximize/Restore Grid  
Remove  
Duplicate  
Add Row  
Delete Row  
Duplicate Row  
Filter Table  
Convert To...  
New Activity  
Related Activities  
☒ Display Route Stages  
☒ Display Items  
☒ Display Resources  
☒ Display Texts

Bruno right clicks on the item he needs to remove and selects "Delete Row"

To save his changes, Bruno clicks <Update>

Product No.  X Quantity

Product Description

BOM Type

Production Std Cost

Planned Average Production Size

To Whse

Price List

Distr. Rule

Project

#	Type	No.	Description	Quantity	UoM N...	From Whse	Issue Method	Production Std...	Total Production...	Price List	Unit Price
1	Item	RH2005	2-Row Bulk	1,000	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
2	Item	RH2024	Maris Otter supersack	200	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
3	Item	RH2006	C-45	100	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
4	Item	RH2006	Cascade	50	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
5	Item	RH2014	German Tradition	1	lb	A1	Manual	\$ 0.0000	\$ 0.0000	CA-North	
6	Item										

Update Cancel Update PdOs Procedures Versions Make Default

Product Price



Bill of Materials

Product No. W1003 X Quantity 30.000

Product Description Wort - IPA

BOM Type Production

Production Std Cost \$ 0.0000

Planned Average Production Size 1.0000

To Whse BH01

Price List CA-North

Distr. Rule

Project

Update PdO Documents

#	Type	Doc. No.	Status	Product No.	Product Description	Order Date	Planned Quantity
1	Item	10023	Planned	W1003	Wort - IPA	09/01/20	
2	Item	10024	Planned	W1003	Wort - IPA	09/10/20	
3	Item	10025	Planned	W1003	Wort - IPA	09/10/20	
4	Item	10026	Planned	W1003	Wort - IPA	09/15/20	
5	Item	10027	Planned	W1003	Wort - IPA	09/18/20	
6	Item	10028	Planned	W1003	Wort - IPA	09/18/20	
		10029	Planned	W1003	Wort - IPA	10/01/20	

Process Cancel Select All

OK Cancel Update PdOs Procedures Versions Make Default

\$ 0.0000

Product Price

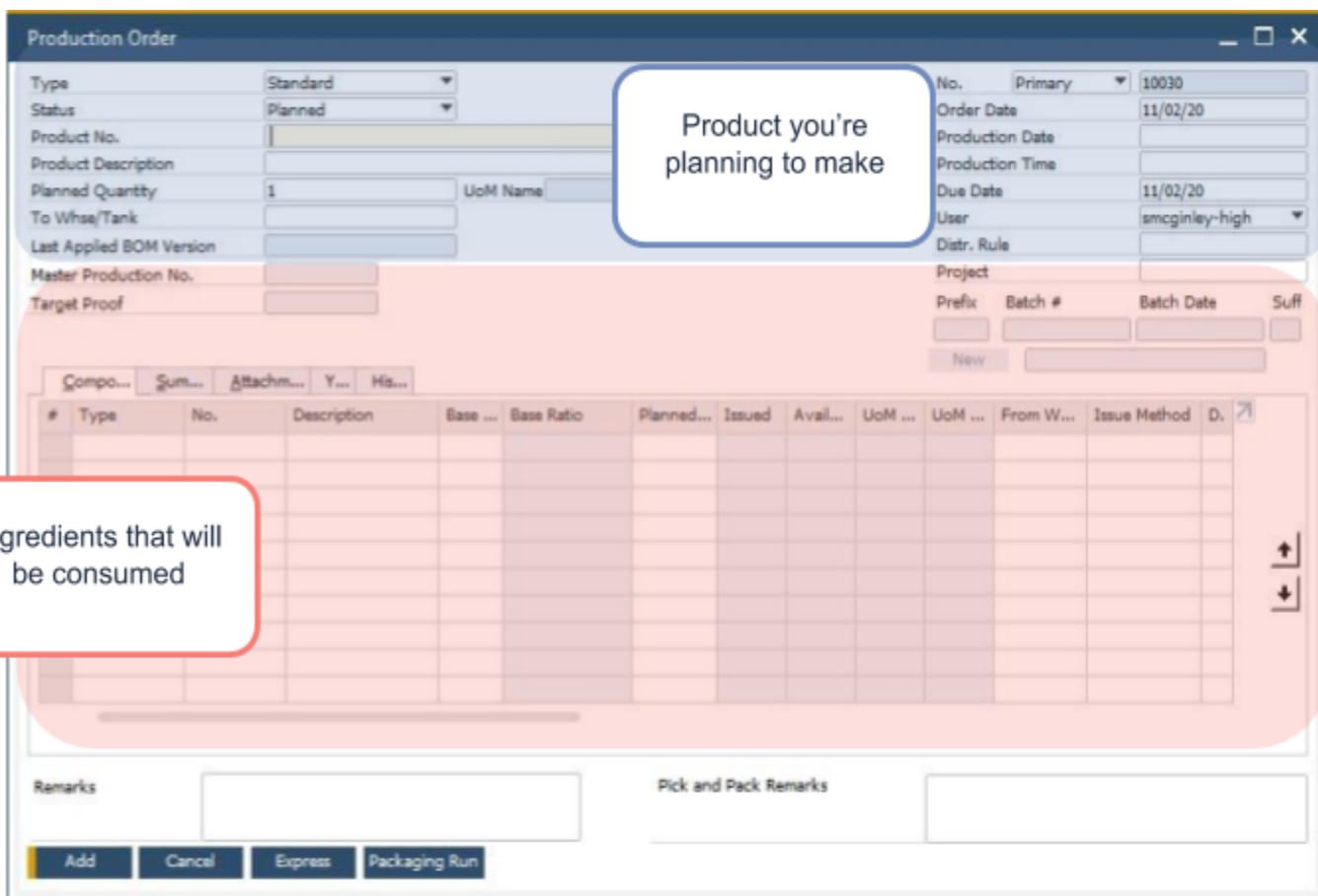
Bruno would now like to update open Production Orders (the PLAN(s)) with changes to the recipe. He selects <Update PdOs> Then highlights the PdO(s) that need to be updated, and clicks <Process>

### Real Life!

Sweet! Bruno just made some edits to his BoM and is ready to find out about the PLAN of action!

Bruno  
System message about  
overwriting selected  
Production Orders, to which  
he clicks <Yes>









## Finding a PdO

Modules > Production > Production Order > Find Mode > Search for PdO

#	Document Number	Production Order Type	Production Date	Item Number	Product Description
1	10023	Standard	09/01/20	Wort - IPA	Wort - IPA
2	10024	Standard	09/10/20	Wort - IPA	Wort - IPA
3	10025	Standard	09/10/20	Wort - IPA	Wort - IPA
4	10026	Standard	09/15/20	Wort - IPA	Wort - IPA
5	10027	Standard	09/18/20	Wort - IPA	Wort - IPA
6	10028	Standard	09/18/20	Wort - IPA	Wort - IPA
7	10029	Standard	10/01/20	Wort - IPA	Wort - IPA

### Navigation Tip!

You can also drag and drop the Production Order function into your Common Functions widget

#	Type	No.	Description	Base ...	Base Ratio	Planned...	Issued	Avail...	UoM ...	UoM ...	From W...	Issue Method	D.
1	Item	RM2005	2-Row Bulk	33.333	100/3	1,000	0	1,194.205	Manual	b	A1	Manual	
2	Item	RM2028	Maris Otter supersac	6.467	20/3	200	0	8.600	Manual	b	A1	Manual	
3	Item	RM2024	C-45	3.333	10/3	100	0	9.300	Manual	b	A1	Manual	
4	Item	RH2006	Cascade	1.667	5/3	50	0	9.639	Manual	b	A1	Manual	
5	Item	RH2014	German Tradition	0.033	1/30	1	0	9.993	Manual	b	A1	Manual	
6	Item						0	0					



### Real Life!

Bill is planning out Production for his team on the floor. He's going to review some important fields on an individual PdO for Wort IPA.

Let's take a closer look with Bill



## PdO 411

Production Order

Status: Set to Planned | Released | Closed

Product you are planning to make

Quantity of end-product

Unit of Measure for quantity

Where will my product reside?

Master Production Number: Links multiple production orders into a single "run"

Date of PdO creation

Date of PdO Production (when does it need to occur?)

PdO Batch #

Copy of BoM!

Express = to Create! Make this Plan

No.	Primary	10023
Order Date		09/01/20
Production Date		09/01/20
Production Time		11:56AM
		09/01/20
		smcginley-high

Compo...	Sur					
#	Type	No.	Issued			
1	Item	RM2005	2-Row Bulk	33.333	100/3	1,000
2	Item	RM2028	Maris Otter supersack	6.667	20/3	200
		RM2024	C-45	3.333	10/3	100
		RH2006	Cascade	1.667	5/3	50
		RH2014	German Tradition	0.033	1/30	1

Remarks

Pick and Pack Remarks

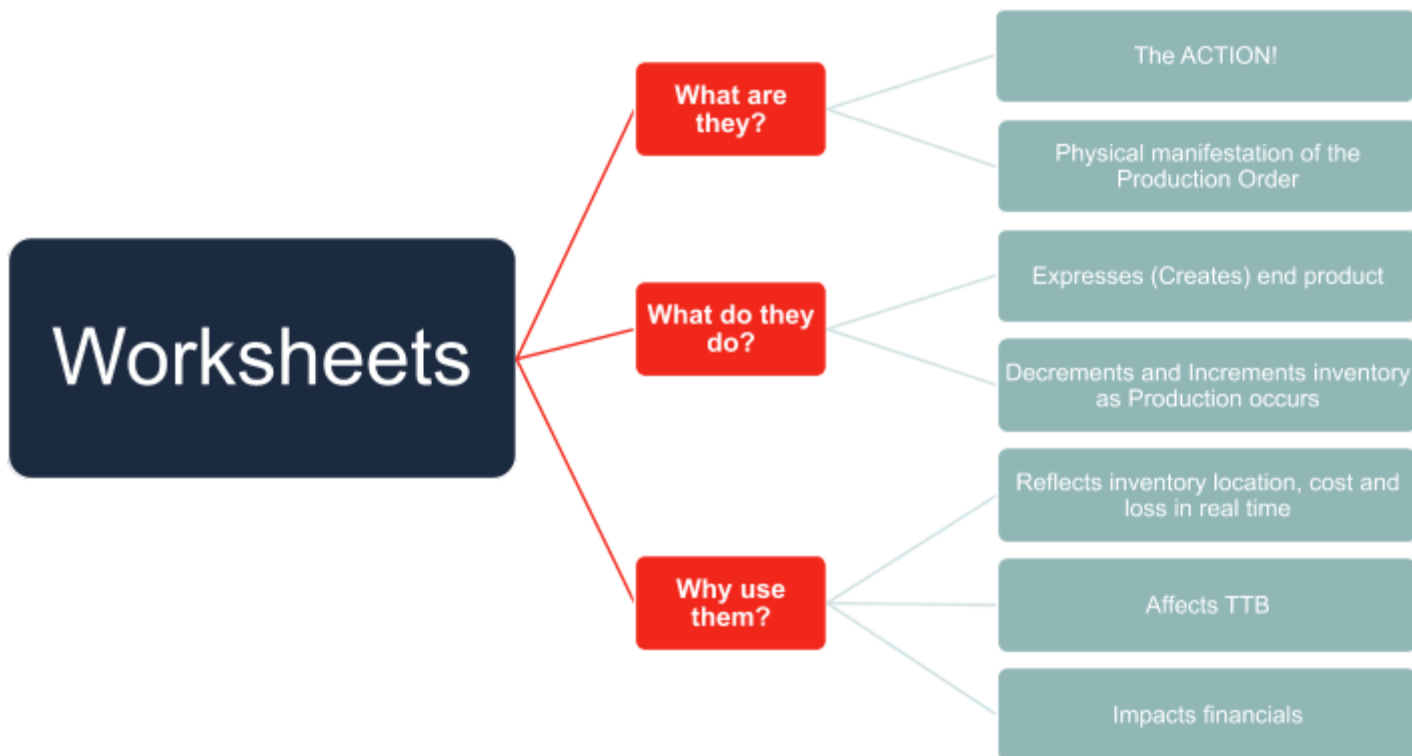
OK Cancel Express Packaging Run

### Real Life!

Bill likes what he sees. This plan for IPA wort is looking pretty good, and he's ready to get the actual Express process going!







## Worksheets

**Note!**  
There are 3 Worksheets

## Finding a Worksheet

Modules > Production > Production Forms > Brewing | Cellar | Packaging Worksheet

FOCloud Production17

**Brewing Worksheet:**

Where you go to Express

**Cellar Worksheet:**

Where you go to Express

**Packaging Worksheet:**

Where you go to Express



## Worksheet 411



### Real Life!

Dan wants to check on the outstanding plans for the production of IPA so he knows how to plan out his week...

Let's take a closer look at each worksheet with Dan



### Brewing Worksheet

Modules > Production > Production Forms > Brewing Worksheet

**Look Up Menus**

- Production
- Production Forms
- Cooking Worksheet
- Brewing Worksheet
- Stillhouse Worksheet
- Barrel Management Co.

**Choose correct Tab**

**Location of Production**

**Choose PdO status to always show Planned/Released**

**Wort**

**Green Beer**

**Refresh Matrix to update data**

**Production Start & End Dates (as indicated on PdO)**

**Express! Takes you to CREATE the wort**

**Production Orders (PdOs) for Wort – The Plan(s)**

S	Tank	Prod #	Item Code	Brand	Batch	MPN	Prod. Date	Prod. Time	Plan Qty
P	BH01	10023	W1003	IPA	0	0	09/02/20	11:56 AM	30,000
P	BH01	10024	W1003	IPA	0	0	09/10/20	11:56 AM	30,000
P	BH01	10025	W1003	IPA	0	0	09/10/20	11:56 AM	30,000
P	BH01	10026	W1003	IPA	0	0	09/11/20	11:56 AM	30,000
P	BH01	10027	W1003	IPA	0	0	09/18/20	11:56 AM	30,000
P	BH01	10028	W1003	IPA	0	0	09/18/20	11:56 AM	30,000
P	BH01	10029	W1003	IPA	0	0	10/01/20	11:57 AM	30,000

**Ingredients that will be consumed**

ItemCode	Plan Qty	UoM	Item Name	Type	Stage	Timing
RM2005	1,000.000	lb	2-Row Bulk	RM		
RM2028	200.000	lb	Mari's Otter suppack	RM		
RM2024	100.000	lb	C-45	RM		
RM2006	50.000	lb	Cascade	RM		
RM2014	1.000	lb	German Tradition	RM		

**Yeast ID**   
**Yeast Tank**   
**Yeast Crop**   
**Yeast Gen**   
**Yeast Qty**



## Cellar Worksheet

Modules > Production > Production Forms > Cellar Worksheet

The screenshot shows the 'Cellar Worksheet' interface. On the left is a 'Look Up Menus' sidebar with a 'Production' section containing 'Production Forms' and a list of worksheets: 'Cooking Worksheet', 'Brewing Worksheet', 'Stillhouse Worksheet', 'Barrel Management Co', 'Cellar Worksheet' (highlighted), and 'Packaging Worksheet'. Above the main table are filters for 'Location' (set to 'Main Location'), 'Status' (set to 'Planned/Released'), 'Start Date' (10/01/18), and 'End Date' (11/02/20), along with a 'Refresh Matrix' button. The main table has columns: Warehouse, Item Code, Item Name, Volume, Batch, Days Left, Batch Received, and Modified. It lists items like 'Bright Beer - Blonde Bock' and 'Green Beer - Portlandia Porter'. Below this is a 'Current Production Orders' section with columns for Batch, MPN, Production Order #, Style, Prod Date, Prod Time, Due Date, From Whse, To Whse, Planned Qty, Volume in Tank, Issued, and Receipt. It shows orders for 'Green Beer - Amber Ale' and 'Green Beer - Northwest Nut Brown'. At the bottom is an 'Ingredients' table with columns: Item Name, Whse, Qty, and Qty In-stock in Whse, showing 'Wort - Amber Ale'.

**Green Beer**

**Brite Beer**

**Hopped Beer**

Choose correct Tab

Location of Production

Choose PdO status to always show Planned/Released

Production Start & End Dates (as indicated on PdO)

Refresh Matrix to update data

Shows tanks and their current liquid volumes!

Express!  
Takes you to **CREATE** the Green Beer/Add'l Steps/ Brite Beer

Production Orders (PdOs) for Green Beer/Add'l Steps/Brite Beer – The Plan(s)

Ingredients that will be consumed



## Packaging Worksheet

Modules > Production > Production Forms > Packaging Worksheet

Look Up Menus

Production

Production Forms

Cooking Worksheet

Brewing Worksheet

Stillhouse Worksheet

Barrel Management Co

Cellar Worksheet

Packaging Worksheet

Choose PdO status to always show Planned/R released

Production Start & End Dates (as indicated on PdO)

Refresh Matrix to update data

Shows tanks and their current liquid volumes!

Production Orders (PdOs) for Packaged goods

Ingredients that will be consumed

Express! Takes you to **CREATE** the Packaged goods

Finished Beer

Location	Main Location	Status	Planned/Released	Start Date	End Date	Refresh Matrix								
Current Tank Status :														
Whse	Run #	Item Code	Item Name	Volume	Batch	Batch Received								
B99			--{Empty}--	0.000										
BT01			--{Empty}--	0.000										
BT02	2	BB006	Bright Beer - Blonde Bock	57.000	BBK133-134	10/06/18								
BT03			--{Empty}--	0.000										
BT04			--{Empty}--	0.000										
BT05			--{Empty}--	0.000										
Current Production Orders :														
S	Batch	MPN	Production Order #	Prod Date	Prod Time	Style	Warehouse	UoM	Planned Qty	Completed Qty	Issued	Received	Remarks	Run #
P	BBK133-134	4	10033	09/15/20	2:52PM	Blonde Bock - Case 2/12/12 BE	A1	EA	200.000	0.000				
P	BBK133-134	4	10034	09/15/20	2:52PM	Blonde Bock - Case 4/6/12 BE	A1	EA	300.000	0.000				
P	BBK133-134	4	10035	09/15/20	2:52PM	Blonde Bock - Keg 1/2 BE	A1	EA	40.000	0.000				
Beer Lines :														
Item Code	Item Name	Warehouse	UoM	Planned Qty										
BB006	Bright Beer - Blonde Bock	BT02	BBL	14.400										
PG005-SEA5	Twelve Pack Tray - Seasonal	A1	EA	200.000										
PG005-1006	Twelve Pack Tray - Blonde Bock	A1	EA	400.000										
PG015-1006	Label body - Blonde Bock	A1	EA	4.800.000								10.000.00		
PG050-1006	Carton 12oz - Blonde Bock	A1	EA	4.800.000								10.000.00		



## Express Screen

Modules > Production > Production Forms > Worksheet <Express Button>

**Express Production**

Product Code: W1003 Warehouse: BH01  
Product Name: Wort - IPA  
Planned Qty: 30 BBL  
Receive Qty: 30.000 BBL  
Variance: 0  
Production Date: 09/01/20  
Batch ID: IPA001  
Initials:

Product being made and quantity received

Item Code	Item Name	PlannedQty	WHse	ItemCode	BatchNumber	In Stock	UoM	In Date	ActQty
▼ 01. RM2005	2-Row Bulk	▼ 1,000.000	A1	RM2005	1234567	40,000.00	lb	05/01/20	1,000.00
			A1	RM2005	456789	550.00	lb	10/30/20	0.00
▼ 02. RM2028	Maris Otter supersack	▼ 200.000	A1	RM2028	999865	10,000.00	lb	10/2	
▼ 03. RM2024	C-45	▼ 100.000	A1	RM2024	999854	10,000.00	lb	10/2	
▼ 04. RH2006	Cascade	▼ 50.000	A1	RH2006	65489	9,989.00	lb	10/22	
▼ 05. RH2014	German Tradition	▼ 1.000	A1	RH2014	102218	10,000.00	lb	10/22/18	1.00

Ingredients and amounts that are **ACTUALLY** consumed

Refresh

Process

### Real Life!

Aha! Dan is ready to start brewing some beer now that he knows which functions to utilize within OBEER!



Worksheet

Production Order

Bill of Materials

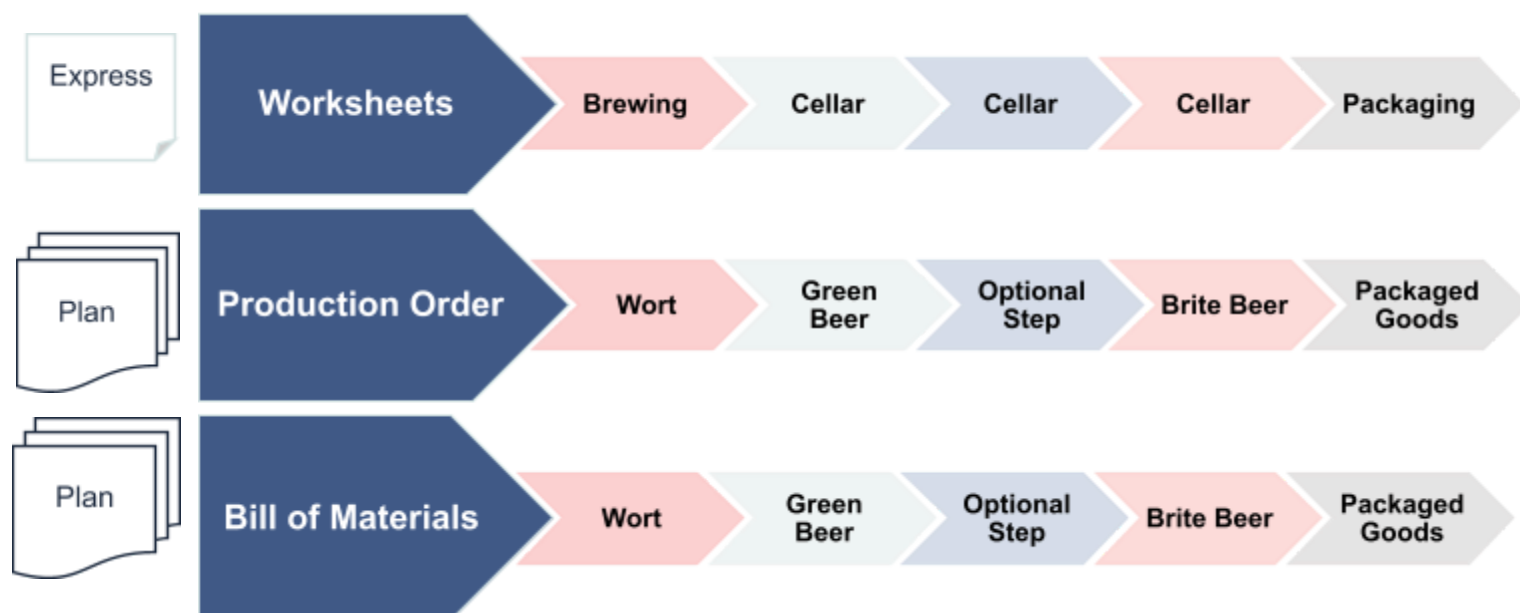


# Production process

## Planning vs. expressing



As Bruno, Bill and Dan found out during Production Basics, there are 2 main processes within Production. Planning and Expressing. Bill of Materials (BoMs) and Production Orders (PdOs) take care of the planning stages, and Worksheets (Brewing, Cellar & Packaging) handle the execution/creation of those plans.



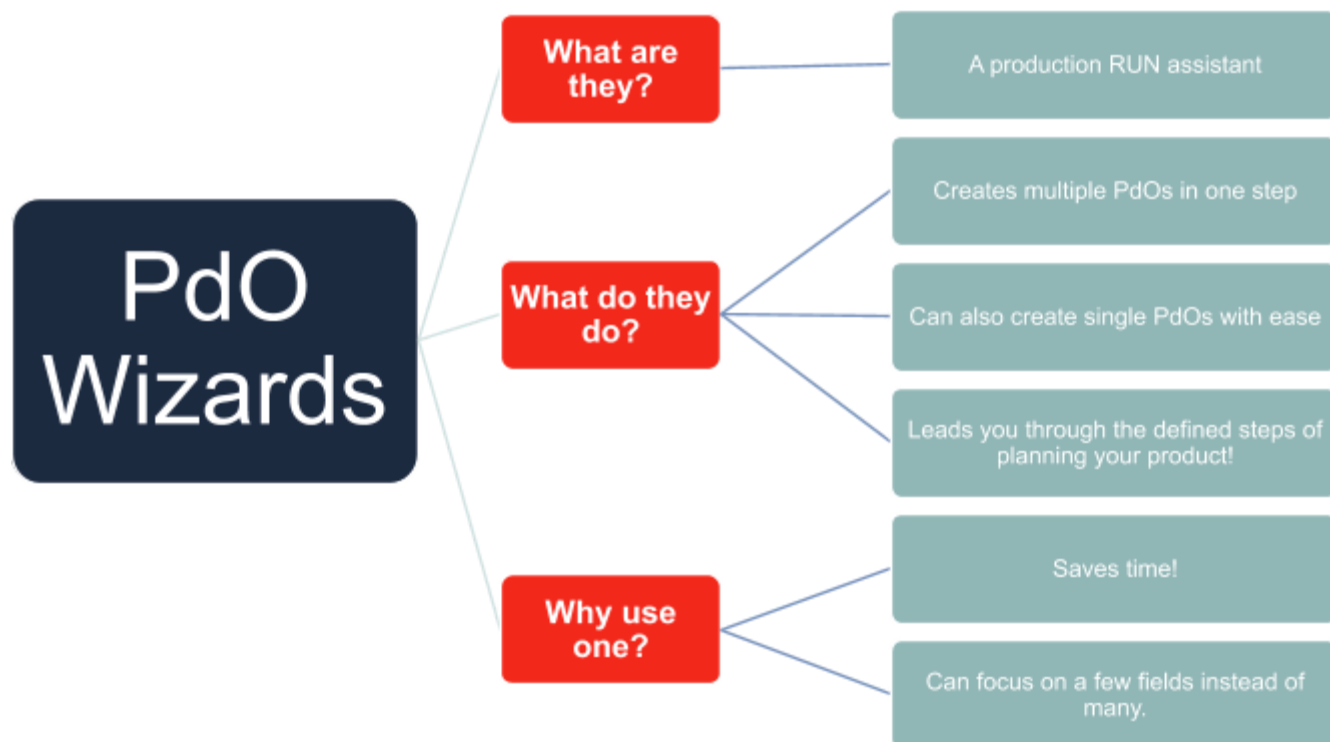
### Remember!

Each step in production consumes the previous.





## PdO wizards & planning



You will be utilizing PdO Wizards to do the following:  
Planning out your Production...in a fell swoop!