

# BYU Dining Services

## Standard Operating Procedures

### BP0022: Managing Production

**Business Process ID:** [BP0022](#)  
**SOP Collection:** [Eatec SOPs](#)  
**Last Updated:** September 6, 2024  
**URL:** [/policy/eatec/production](#)

**SOP Owner:** Douglas Walker  
**Accountable Group:** Dining Accounting  
**Collaborative Business Process**

#### Purpose

Production inside Eatec is used to accurately track the depletion of ingredients, the creation of finished goods, and create notes/remarks for each production transaction to be used inside reports or other business evaluations in the future. Production plans utilize production history to create efficient plans to streamline consistently produced FG's.

#### Responsibilities

Area Responsibilities	Centralized Responsibilities
<b>Production User at CSC, Cougar Express, and Meat Shop</b> <ul style="list-style-type: none"> <li>Ensuring Production is processed according to the SOP guideline for their specific area.</li> <li>Inputting production as it occurs.</li> <li>Contacting the SOP Owner for conflicts or SOP update requests to Dining Accounting.</li> </ul>	<b><u>Dining Accounting</u></b> <b>Doug Walker</b> <ul style="list-style-type: none"> <li>Maintaining and ensuring the SOP is followed for all areas using it.</li> <li>Resolving concerns or issues as they arise for production sop issues.</li> </ul>

#### SOP User Guide

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Definitions

Production Definitions

**Location:** The area which the production is taking place (where is the item being produced)

**Post Date:** The date that the production took place

**Created By:** Autogenerated with the Eatec user posting the production (ex: Blinde1)

**Remarks:** Details to better specify things done in the production process out of the ordinary

**Reference:** Provide an accurate description of the items generally being produced (Ex: CSC Bakery – Donuts, MS for Helaman Creamery, etc.)

**Quantity:** The quantity that is being produced of that item

**Recipe:** The production recipe used to create that FG (For more details on this please see “setting Production recipes” section in this SOP.

**Expiration Date:** The date the Finished Good will expire. This field will be required if the item is lot tracked. This field will not be editable if the item is not lot tracked.

**Batches:** Currently pulls up as Item quantity to produce/Production Recipe Batch Quantity = Value in Batches. This is not currently being utilized for production or reporting. BYU is not using this number.

**Manufactured Date:** This field is not editable. Once the production run has been posted, this date will be saved in the production table under TransactionDate

**Print Qty:** This quantity should reflect the amount of production worksheets to print. Currently, it does not work, and BYU has no current use for it. Please ignore Print Qty.

Production Plan Definitions

**Plan Id:** The name of your production plan (The searchable field to find your plan later)

**Location:** The location in which the production will occur for this plan

**Start Date:** The day that this plan will start on

**Period Length:** The period by which the plan will be set (Ex: Day, Week, Month)

**No. Of Periods:** # of period in the plan (Period length X # of periods = End date)

**End Date:** Date the plan will be finished (Period length X # of periods = End date)

**Description:** opt. Field to further describe the production plan.

**From Date:** The starting date you would like to pull production history from

**To Date:** The ending date you would like to pull production history from

**Locations:** The locations to filter the history from

**Supply Locations:** A checkbox to filter your selected locations as supply locations rather than locations.

**Average Formula:** A drop-down list to specify one of 3 options

1. Average by period- Averages the desired usage type by period.
2. Global Period Average- Takes the average and allocates it across each period.
3. Totals by period- Takes the total and allocates it to a period.

**Round up:** A checkbox to round up non-whole numbers once loaded

**Align Days:** This checkbox will align your production history with the days specified in the period (Please view the training video above for more information on this)

**Include (Transfers, production, usage, requisitions, open Requisitions only):** Required field to specify from which transactions the user would like to pull history from options included in ( ) above.

## Production

Production runs within Eatec allow users to produce finished goods, increasing the quantity on hand of finished goods and decreasing quantity of ingredients used to create the finished good.

## Differences in Production vs. Production Plan

Production is used to record production that is accomplished in that same day. Users must manually load finished goods into a list to produce them. Production plans are different in that they can load finished goods from usage history into an item list and scaling the data. Production plans are used to plan and analyze future production events whereas Production is used to record a production run.

## Creating a Production Run

1. **Navigate to Production**
  - Click into Production Management -> Production -> New Production
2. **Specify Production Details**
  - Fill out production details based on the definitions above for location, postdate, remarks (optional), and reference (optional).

- If the item is lot tracked, then check the box label “Choose Ingredient Lots”. This will activate the “Choose Lot” function for each item allowing the user to enter which lot of ingredients were used in production.
- 3. **Add Finished Goods to Production List**
  - Click the blue carrot > next to “Item List” to insert your finished good items into your item list. Items can be added by individual item, package, type or class. (For each section there are specific fields you can search by, listed in grey text in the search field).
    - Only FG items will appear in the search field, so if you can’t find what you are looking for, please make sure it is set as FG with a production recipe.
- 4. **Specify Quantity and Remarks**
  - Once the items have been added to the item list, enter the quantity produced. Optionally, remarks may be added on the item level.
  - If an item produced is lot tracked, a lot id and expiration date will also be required. Also, if the “Choose Ingredients Lots” box is checked, an option called “Choose Lot” will appear for each item in the item list. Select this option and a pop-up will appear allowing the user to select the lot and quantity used of each ingredient lot used in the production of the finished good. If no lots are selected, Eatec will automatically use the oldest lot.
- 5. **Attach Files**
  - If desired, an attachment can be added to a production run. To attach another file, click “More Option”-> “Attach Files” and search your computer for the file to attach.
- 6. **Post Production**
  - Click Print & Post Production or Post Production if no printout is desired. Refer to the “production reports” section for more information on reports.

### Viewing Past Production Runs

After a production run is processed users can click into it and do the following actions:

- **Copy as New:** allows a user to create a new production transaction with the exact same data.
- **Print:** Pulls up the Production Posting form (PRDFRM)
- **Print Batch:** Pulls up the 4\_X\_3\_Production form. BYU currently does not have a use for this report.
- **Print Worksheet:** Pulls up the option of printing report “Put Away Production/butchery” or “Pick Up – Raw Items”. Both reports do not currently function, and BYU does not currently use them.
- **View Attachments:** If a file was attached to a production run during processing, that file can be viewed again.

### Viewing Production Recipes

1. To view, modify, or assign a production recipe to an FG go to the Masters -> Inventory List.
2. Search for the FG item that you would like to view the production recipe for and select it from the options from the item list on the left side of the page.
3. Under the “Other Fields” Section at the bottom of the inventory details tab you can view the Production Recipe and the Alternate Production recipe

- Both the production recipe and the alternate production recipe are available in the drop-down selection when posting a production run.

### Assigning Production Recipes to Finished Goods

Assigning Production Recipes will originally be done when the FG Item is created. If at any time you need to change the original production recipe, please refer to the sections below.

- Area Owned FG's

To request a change in your area's FG, contact your area "production user" to change the production recipe, or approve you to do so. You do not need approval to add the alternate production recipe, just make sure to notify your areas "production user".

- Non-Area Owned FG

If the FG is being produced not in your area and you require a change, please contact Douglas\_walker@byu.edu.

### Production Plans

Production plans allow areas to create future plans of what they plan to produce based on historical usage data. Please follow the instructions and definitions below on how to create your own production plan.

#### Creating a Production Plan

**1. Navigate to Production Plan**

- Click into Production Management -> Production Plan -> Create New

**2. Specify Production Plan Details**

- Fill out the required fields --- plan id, location, start date, period length, no. of periods, end date. A description may be added as well. See field definitions above.

**3. Navigate to Production Plan List**

- Click the blue carrot ">" symbol next to the item list at the top right of the page.

**4. Load Production History**

- To load items to produce based on past usage, click the "Load Production History" button. This will create a pop-up called "Historical Production Data" that contain the following list of parameters: From Date, To Date, Locations, Supply Locations, Average Formula, Round Up, Align Days, Transfers, Production, Usage, Requisitions, Open Requisition Only.
- Select a "From Date", "To Date", "Location(s)", and "Average Formula". Under the "Include" section, select what type of historical usage you would like to load into the item list. Select apply.

**5. Finalize Production Plan List**

- Items can also be manually added to the Item List if desired. Search for the finished goods using the Inventory-Items search bar in the top left.
- Modify or input the desired production quantity under "QTY". If you want to scale the production of any items, see instructions below. Do not adjust the cost of the item being produced.

**6. Save Production Plan**

- Once the item list is filled out and modified you can either 'post production' (by selecting the specific rows or columns that you want to post), 'Create and print' (Which creates the production plan and prints out the PLPFRM form, or simply 'Create' the plan to be posted or edited at a later point.
- Only Production Plans that have a period length of 'Daily' can post production. Weekly and Monthly plans are used for analysis and summary information.

### Scaling Production Data

1. Select either the specific item (not recommended) or the entire period (by clicking the checkbox next to the period. (Ex: Fri 26/07).
2. Once the data is selected that you wish to scale click on the 2 boxes icon in between the trash can and the circle arrow.
3. Input a scale by (%) as well as a rounding option (Round up, round down, don't round).
4. Click update and your data will now be scaled.

### Resetting the cost

If the cost of the item has been manually changed, use the reset cost button (circle arrow button) to reset the cost to what Eatec is tracking it as.

### Reviewing Production Plans

After a production plan is created and clicked into you have the following options:

**Analysis-** Select items you want to analyze, allows the creation of a shopping cart similar to MRP.

**Summary-** Creates a cost summary by Type of item.

**Copy as New-** Creates a new production plan.

**Edit-** Allows Production Plans to be edited.

**Print-** Please refer to production reports for more information on this

**History-** Shows a history of changes made to the Production Plan details (start date, title, etc), not the Inventory List.

**Print Worksheet-** Please refer to production reports for more information.

**Deactivate-** Deactivates the Production Plan

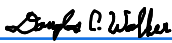
**Post Production-** Only functions for Daily period length plans. Will paste selected items into the production module.


### Production Reports

Below is a list of the production reports used in BYU dining Services:

- [Print] Production Posting form (PRDFRM)
- [Print Batch] 4\_X\_3\_Production form

- [Print Worksheet]
  - Put Away Production/butchery
  - Pick Up – Raw Items

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