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Line Material Tracking

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unit tracking

Line Material Tracking

Estimated time to read: 16 minutes

Material Tracking is at the core of any Manufacturing Execution System (MES). A typical plant will have many different types of **Materials** and a variety of **Resources** that may be linked to form a processing line.

As **Materials** change their characteristics during the course of the manufacturing process, capturing the real-time state of **Materials**, and having a clear understanding of what is happening, and how, to **Materials** as they progress from one **Resource** to the next, is essential for production floor operations.

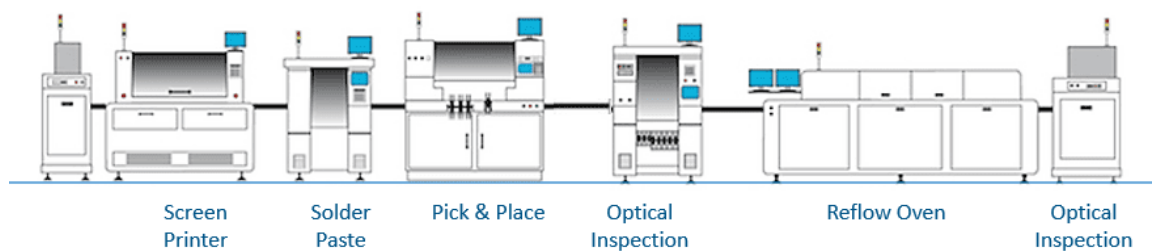
Knowing how to manage and process **Materials** in a Line Resource (**Resource** with Processing Type defined as Line) is at the core of Line Material Tracking and is a critical part of an effective process in the discrete manufacturing sector.

This document will guide you through the setup of a Line and the Material Tracking whilst on it.

Overview

In the context of this tutorial, a Line consists of a set of linked **Resources** (example: equipment connected through a conveyor belt). Material Tracking throughout a Line differs from the regular Material Tracking, so over the next sections it is explained how to model a production process with a **Resource** that has its Processing Type defined as Line (Line Resource), and how to track a **Material** through it.

The image below shows a Surface Mount Technology (SMT) Line and its individual **Resources**, a practical example of a Line Resource:



Concepts

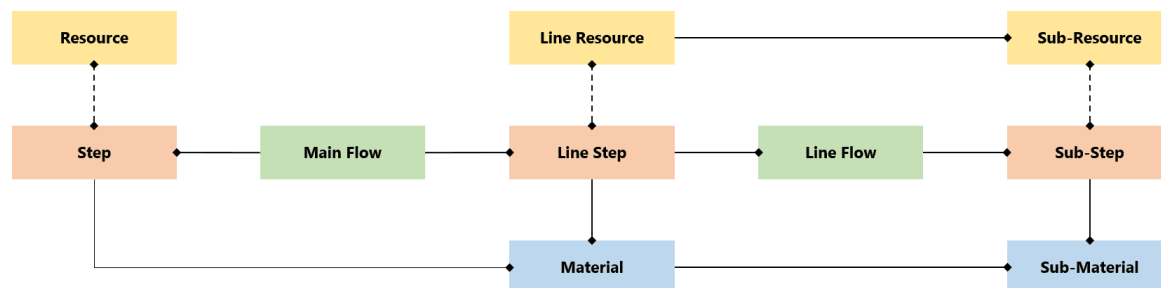
The table below describes the main concepts related to Line Material Tracking:

Concept	Description
Main Flow	The Main Flow defines the Flow for the Main Material.
Line Step	The Line Step represents the complete Line Resource set of operations. The Main Material is simply tracked in and tracked out through the Main Step.
Line Flow	A Flow which contains the In Line Steps.

Concept	Description
Sub-Step	A Step of the Line Flow. Sub-Materials are tracked through the different Sub-Steps.
Service	A Service is a certain process capability that is required by a Material for a certain context, and that is provided by Resources . When a Resource provides the Service that is required by the Material , the Material can be dispatched and processed at that Resource .
Sub-Resource	A physical Resource that is used to process Material at a Sub-Step.
Line Resource	A virtual Resource which represents the complete line. The Processing Type of this Resource must be Line.

Table: Line Material Tracking main concepts

To link the concepts presented above, the object model is shown in the figure below:



Setting up a Line

To track a **Material** through a Line, you need to create not only the Line Resource, but also the **Sub-Resources**, as well as all the Sub-Steps of the Line Flow. The next sub-sections will cover the Line production process configuration steps in more detail.

Create a Line Flow

The Line Flow describes the sequence of Sub-Steps matching the individual operations performed throughout the **Sub-Resources** of the Line Resource. The Line Flow is intended for **Sub-Materials**. To create a Line Flow, the **Steps** of Processing Type defined as Process (Sub-Steps) must already be created.

The Line Flow must have the Flow Type defined as Line, as shown in the image below:

Create Flow

CHANGE SET

GENERAL DATA

General Data

Name: SMT Line Flow

Revision: Name can be automatically generated or you can enter a name of your choice

Description: SMT Line Flow

* Type: Production

Settings

* Flow Type: Line

Flow Content: ☒ Step ☐ Flow

Enabled: ☒

Comments:

Cancel

< Back

Create

Create a Main Flow

The Main Flow describes the sequence of high-level **Steps** intended for the Main Material which also includes the Line Step. To create a Main Flow, the Processing Type of the **Steps** must be defined as Process and the Line Flows must already be created.

The Main Flow must have the Flow Type defined as Sequential, Alternate or Non-Sequential Block.

The production **Step** for the Line Resource must be marked as a Line Step and one or more Line Flows must be added to the Line Step, as shown in the image below:

Refresh

Save

Cancel

More

General

Flow

Actions

SMT [A.1] (Default) 1 (Created)

Flow Structure (2)

SMT

1 Inspection

2 SMT

> SMT Line Flow [A]

ADD STEP

ADD FLOW

DETAILS

LINE FLOW

General Data

Flow: SMT Line Flow [A]

Description:

LINE STEP

No Step selected

Info

To track a Material throughout the Sub-Steps, the Line Step must have the Sub-Material Track State Depth set to **1**.

In the Line Step, the Line Flow Context must be defined. This context will determine which Line Flow will be used when tracking in a **Material** in the Line Step, since there may be more than one Line Flow for the same Line Step. The Line Flow Context configuration is shown in the table below:

Property	Description

Property	Description
Line Validation Mode	<p>Defines the point in time when the Line configuration will be validated. The validation is performed for the <u>BOM</u>, Durables, and Recipe.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> - AtEverySubTrackIn: each one of the Material Line Flow Resources will be validated at every track-in on a Sub-Resource. - AtFirstSubTrackIn: each one of the Material Line Flow Resources will be validated at the first track-in on a Sub-Resource. - AtTrackIn: each one of the Material Line Flow Resources will be validated at the track-in on the Line Resource. - None: no validation is performed.
Line Assembly Mode	<p>The Assembly Mode that will be performed for the Top-Most Material in the Line Step.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> - AutomaticAtTrackIn: the assembly will be performed at track-in. For the Top-Most Material Primary (or Secondary) Quantity matching the <u>BOM</u> Units, it is automatically consumed for every Step of the Material Line Flow having the BOM Assembly Type defined as AutomaticAtTrackIn, taking the first Resource for every In Line Step. - AutomaticAtTrackOut: the assembly will be performed at track-out. For the Top-Most Material Primary (or Secondary) Quantity matching BOM Units, it is automatically consumed for every Step of the Material Line Flow having BOM Assembly Type defined as AutomaticAtTrackOut, taking the first Resource for every In Line Step. - None: no assembly is performed.

Table: Line Flow Context properties

Create a Line Resource

The Line Resource is a virtual **Resource** that represents all the **Sub-Resources** that make up the Line. To create a Line Resource, the **Sub-Resources** of the Line must already be created with the Processing Type defined as Process.

The Line Resource must have the Processing Type defined as Line and the option Enable Sub-Material Tracking must be set to `true`.

In the Manage Resource Structure wizard, the **Sub-Resources** of the Line should be configured, as shown in the image below:

Manage Resource Structure

SMT 1 (Up)

Manage Structure

RESOURCE	SUB-RESOURCES
Parent Resources	
0 Resources	
Sub-Resources	
13 Resources	

Sub-Resource Details

Resource: Solder Paste Printer 2.1

Order: 13

Description:

Processing Type: Process

Group:

State:

Comments:

Cancel

Update

Configure the Required Services

A **Resource** provides **Services** and **Materials** require **Services** at a **Step**, as defined by the Service Context. To configure the **Services**, they must already be created in Critical Manufacturing MES with the Processing Type defined as Process.

Info

The Sub-Resource must provide the same Service as the one required in the Sub-Step.

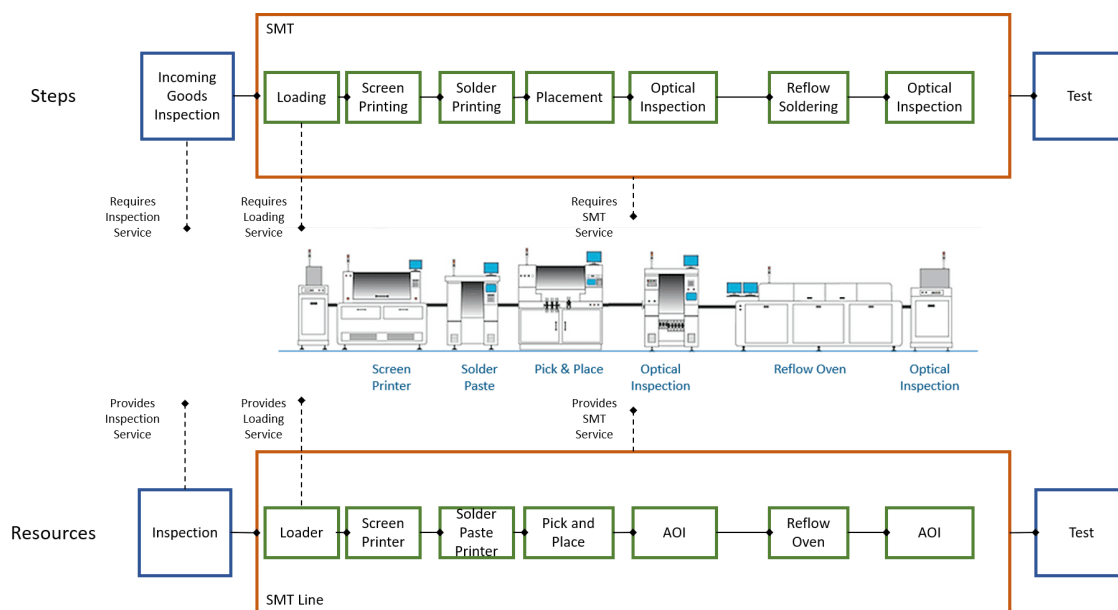
Info

The Line Resource must provide the same Service as the one required in the Line Step.

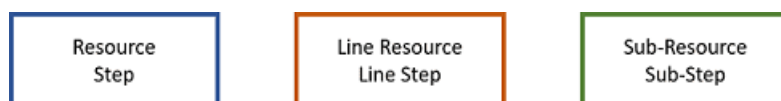
The **Service** is configured through the Manage Services wizard found either through the **Resource** or in the **Service** page, as shown in the image below:

The screenshot shows the 'Manage Services' window. On the left, a list of services includes 'SMT 1 (Up)' and 'SMT Service Enabled'. The main area displays 'Service Details' for 'SMT Service'. Fields include: Service (SMT Service), Description (empty), Type (Standard), Priority (empty), and Enabled (toggle switch). At the bottom, there is a 'Comments' section and 'Cancel' and 'Update' buttons.

Considering the given SMT Line example and the concepts described so far, the combination of both schemes is shown in the following figure:



Caption:



Configure the Bill-of-Materials Context

The **Material** consumption for the production of a **Product** (Target Product) in a **Step** is defined through the configured **Bill-of-Materials** (BOM).

The **BOM** must have the Scope defined as Materials and the Units must match the Step Units.

The **BOM** is configured in a **Step** through the Add **BOM** Context Record wizard, as shown in the image and detailed in the table below:

+ Add BOM Context Record(s) ?

BOMContext (Active) v

Record(s) + - 🗑️

Record #1
Step: SMT Step BOM: SMT AssemblyType: Explicit 🗑️

BOM Context

Logical Flow Path: ▼ Browse

Product: ⌵ 🔍

Product Group: ⌵ 🔍

Flow: ⌵ 🔍

Material: ⌵ 🔍

Production Order: ⌵ 🔍

* BOM: x ⌵ 🔍

* Assembly Type: x ▼

Track-In Check Mode: ▼

Track-Out Losses Mode: ▼

Weigh and Dispense Mode: ▼

Comments:

Cancel Add

Property	Description
Assembly Type	<p>How the BOM Materials will be assembled.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> - AutomaticAtTrackIn: the Material will automatically be assembled when a Material is tracked in. - AutomaticAtTrackOut: the Material will automatically be assembled when a Material is tracked out. - Explicit: the Material is manually assembled and its quantity is not increased. - ExplicitAdd: the Material is manually assembled and its quantity is increased. - ExplicitLongRunning: the Material total quantity is manually assembled, but you do not have to complete the assemble of all the components. - Mixed: allows different Assembly Type consumptions.
Track-In Check Mode	<p>Only used for the AutomaticAtTrackOut mode, to check if the required consumables are attached at the Resource.</p>

Table: BOM Context properties

 Note

If the Material consumption tracking occurs at the Sub-Steps level, then the BOM should be configured in the Sub-Steps. If the Material consumption tracking occurs at the Line Step level, then the BOM should be configured in the Line Step.

The table below describes how the Line Assembly Mode, as defined in the Line Flow Context, works together with the Assembly Type, as defined in the BOM Context:

Line	Assembly Mode	Assembly Type	Description
------	---------------	---------------	-------------

Line Assembly Mode	Assembly Type	Description
AutomaticAtTrackIn	AutomaticAtTrackIn	Assembly will be automatically performed at the Top-Most Material track-in, for all the In Line Steps having AutomaticAtTrackIn Assembly Type configured at the BOM Context.
AutomaticAtTrackIn	AutomaticAtTrackOut, Explicit or ExplicitAdd	No automatic assembly is performed at the Top-Most Material track-in.
AutomaticAtTrackOut	AutomaticAtTrackOut	Assembly will be automatically performed at the Top-Most Material track-out, for all the In Line Steps having AutomaticAtTrackOut Assembly Type configured at the BOM Context.
AutomaticAtTrackOut	AutomaticAtTrackIn, Explicit or ExplicitAdd	No automatic assembly is performed at the Top-Most Material track-out.
Explicit or ExplicitAdd	AutomaticAtTrackIn, AutomaticAtTrackOut, Explicit or ExplicitAdd	No automatic assembly is performed.

Table: Line Resource Material consumption

Manage Consumables

Solder Paste Printer 1.2 (Up)

Consumable Feeds

CONSUMABLE FEED	MATERIAL
Solder Paste Feeder 1.2 Pos: 1	SMT-MAT01 SMT Prod 01 [A] / Qty: 4000 Kg

Consumable Feed Details

Name: Solder Paste Feeder 1.2
Position: 1
Description:
Type: Standard

Material Details

Name: SMT-MAT01
Product: SMT Prod 01 [A]
Description: SMT Prod 01
Primary Qty: 4,000 Kg
Expiration Date:
Order: 1

Comments:

Cancel Update

Configure the Durables Context

The **Durables** required in a **Step** are defined through the configured Bill-of-Durables.

The **BOM** must have the Scope defined as Durables.

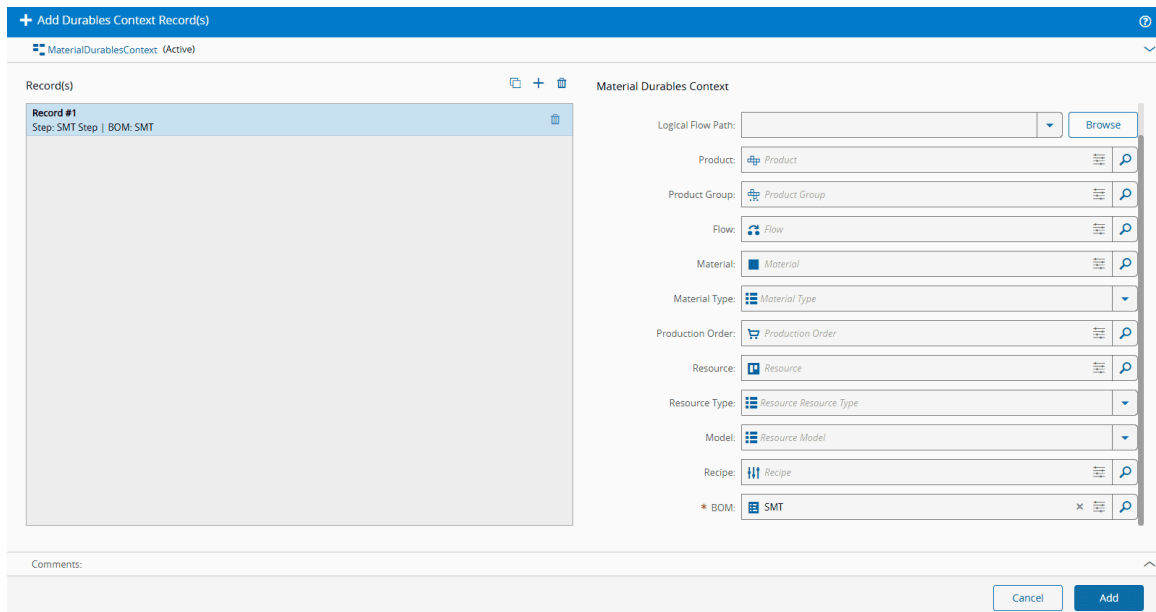
The **BOM** Items are configured through the Manage **BOM** Items wizard of the **BOM**, as described in the table below:

Property	Description
----------	-------------

Property	Description
Product	Durable Product.
Step	Step in which the Material of the Durable Product is found, if filled.
Position	Position where the Durable must be found in the Resource.
Optional	If set to <code>true</code> , the Durable must be present in the Resource when tracking in the Material.
Usage Step	Step in which the Durable is required.

Table: Manage BOM Items properties

The **BOM** is configured in a **Step** through the Add Durables Context Record wizard, as shown in the image below:



Configure the Recipe Context

To process a **Material** in a **Step**, and if a **Recipe** is needed in the Line Flow, this **Recipe** must exist and be added in the Recipe Context. At the **Resource** level, the property Recipe Management Enabled must be `true`.

The **Recipe** is defined through the Add Recipe Context Record(s) wizard, as shown in the image below:

+ Add Recipe Context Record(s)

RecipeContext (Active)

Record(s)

Record #1
Service: SMT Service | Recipe: SMT Recipe

Recipe Context

Logical Flow Path:

Product:

Product Group:

Flow:

Material:

Material Type:

Production Order:

Resource:

Resource Type:

Model:

Running Mode:

* Recipe:

Comments:

Configure the Checklist Context

If a **Checklist** is required the necessary context information must be defined.

The **Checklist** is defined through the Add Checklist Context Record(s) wizard, as shown in the image below:

+ Add Checklist Context Record(s)

MaterialChecklistContext (Active)

Record(s)

Record #1
Step: SMT Step | Operation: MoveNext | Checklist: D6 - Implement and Validate

Material Checklist Context

* Operation:

Product:

Product Group:

Flow:

Material:

Material Type:

Production Order:

Resource:

Resource Type:

Model:

Recipe:

* Checklist:

Comments:

Line Context Resolution and Validation

The Line Flow Context resolution is performed when tracking in the Main Material in the Line Step. At this moment, the Line Flow for the **Sub-Materials** is selected.

For the Line Step, the **Recipe**, **Durables**, **BOM**, **Data Collections**, **Documents**, and **Checklists** are resolved normally for the Main Material and the **Recipe** and **BOM** of Durables Instances are created for the Main Material.

At the same time, for the Sub-Steps, the **Recipe**, **Durables**, **BOM**, and **Data Collections** are resolved always using the Main Material in the Context resolution. Any **Recipe** and **BOM** of Durables Instances are created

at this time and will be applied for all the **Sub-Materials** when tracking through the Sub-Steps.

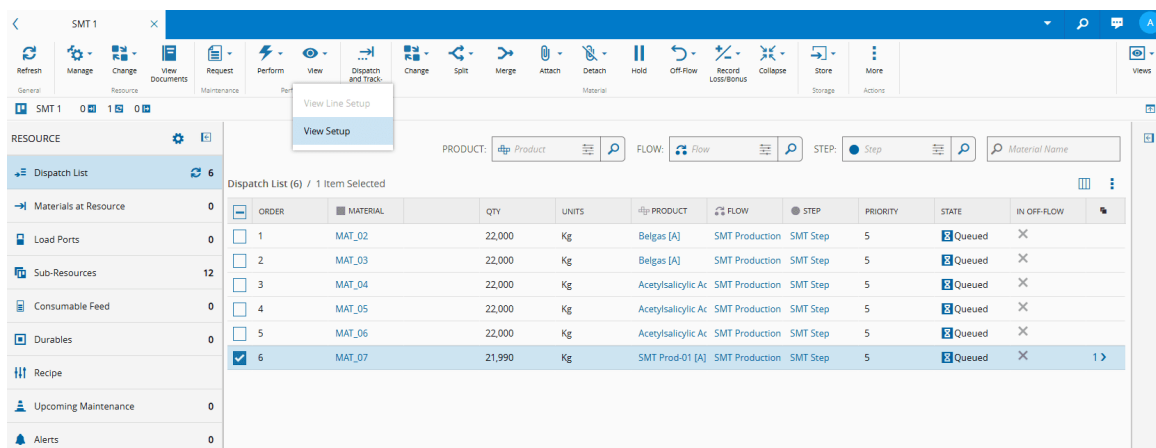
The validation of **Durables** and **Consumable Feeds** required throughout the Line Flow is performed depending on the defined Line Validation Mode.

Using a Line

Before tracking in a **Material** in a Line Resource, it is necessary to set up the Line. Depending on the Line configuration, there are validations regarding the Line **Durables**, **Consumables**, and **Recipe Parameters** definition.

Perform Setup

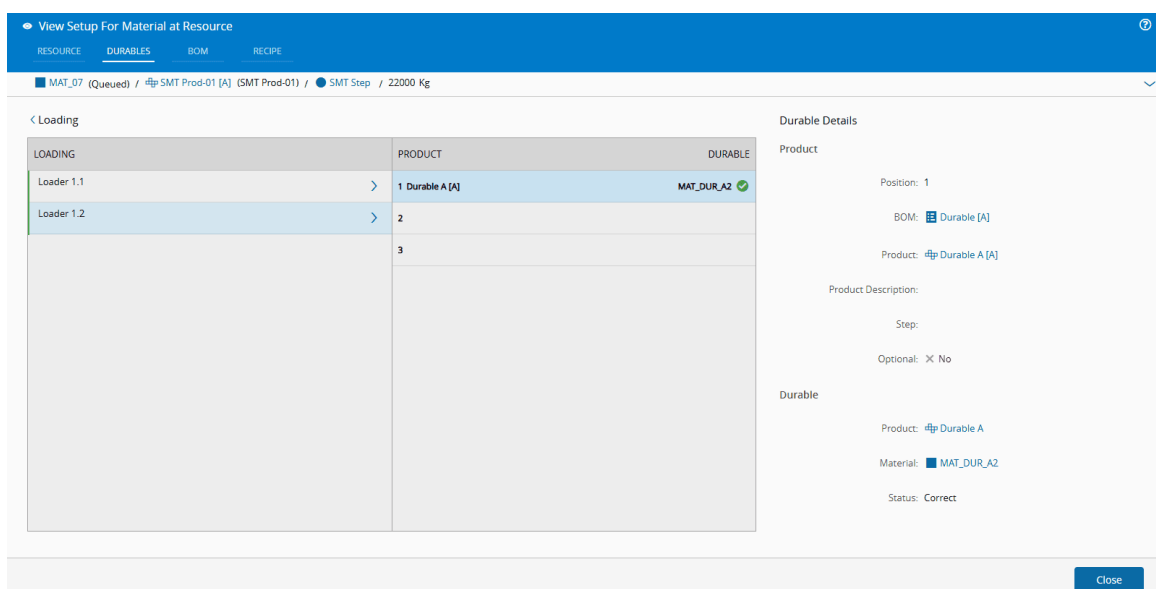
The Line set up information can be accessed in the View Setup wizard. This is available in the Resource View of the **Resource**, with the Processing Type defined as Line, by selecting the **Material** to be tracked in, as shown in the image below:



The screenshot shows the SMT 1 Resource View. On the left, there is a sidebar with various resource management options. The main area displays a 'Dispatch List (6) / 1 Item Selected' table. A 'View Setup' button is visible in the top right corner of the main area.

ORDER	MATERIAL	QTY	UNITS	PRODUCT	FLOW	STEP	PRIORITY	STATE	IN OFF-FLOW
1	MAT_02	22,000	Kg	Belgas [A]	SMT Production	SMT Step	5	Queued	X
2	MAT_03	22,000	Kg	Belgas [A]	SMT Production	SMT Step	5	Queued	X
3	MAT_04	22,000	Kg	Acetylsalicylic Ac	SMT Production	SMT Step	5	Queued	X
4	MAT_05	22,000	Kg	Acetylsalicylic Ac	SMT Production	SMT Step	5	Queued	X
5	MAT_06	22,000	Kg	Acetylsalicylic Ac	SMT Production	SMT Step	5	Queued	X
6	MAT_07	21,990	Kg	SMT Prod-01 [A]	SMT Production	SMT Step	5	Queued	X

The View Setup For Material at Resource wizard will display the available information in each of its tabs:



The screenshot shows the 'View Setup For Material at Resource' wizard. The 'DURABLES' tab is selected. The left pane shows a table with 'LOADING' and 'PRODUCT' columns. The right pane shows 'Durable Details' for '1 Durable A [A]'.

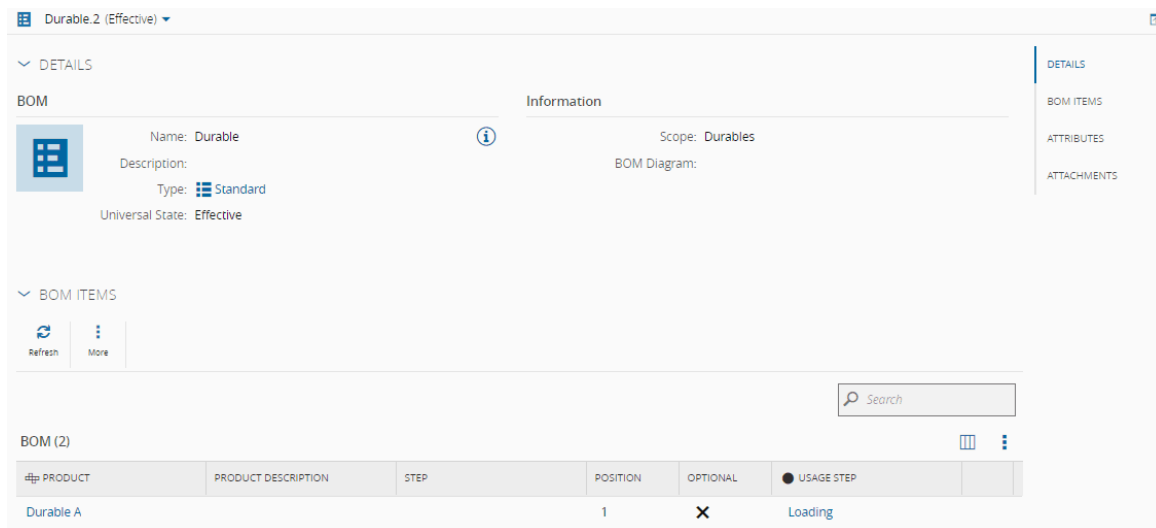
LOADING	PRODUCT	DURABLE
Loader 1.1	1 Durable A [A]	MAT_DUR_A2
Loader 1.2	2	
	3	

Durable Details

Product: 1
 BOM: Durable [A]
 Product: Durable A [A]
 Product Description:
 Step:
 Optional: X No
 Durable:
 Product: Durable A
 Material: MAT_DUR_A2
 Status: Correct

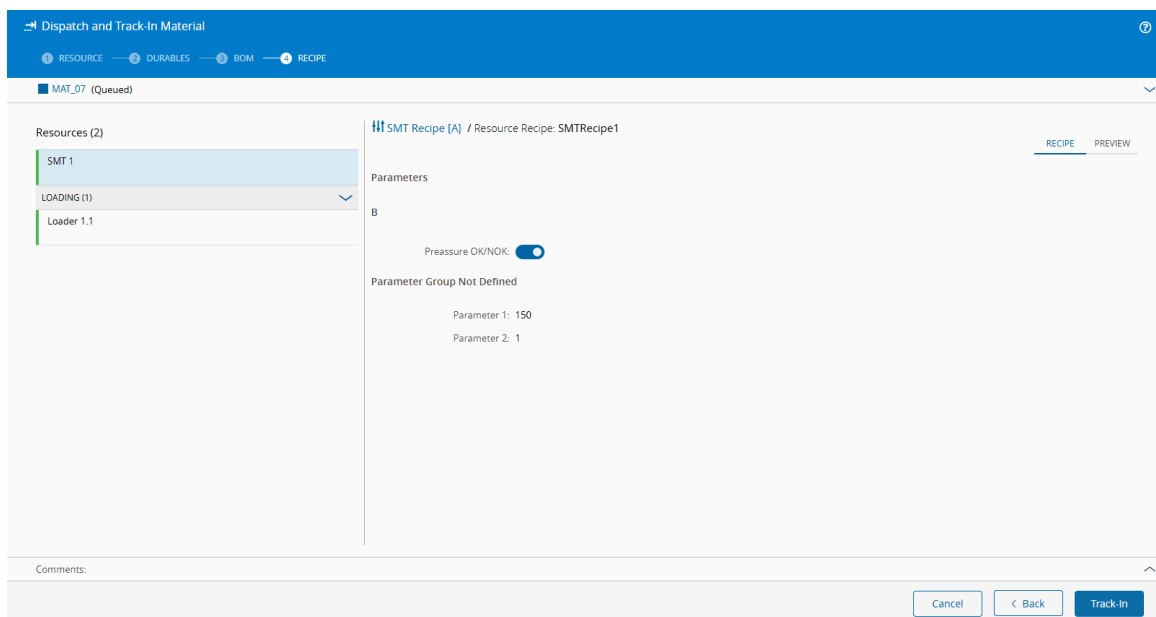
Taking an example of a Line Resource with the Line Validation Mode defined as At Track In, all the Line Sub-Resources will be validated, at Track-In, regarding:

- The **Durables** required through the different Line Sub-Steps that must be attached to the **Sub-Resources** Position as defined in the **BOM** of Durables, as shown in the image below.
- The **Consumables** required throughout the Line Sub-Steps that must be attached to the **Sub-Resources** Consumable Feeds Position as defined in the **BOM**.



Track-In a Material

At track in, information on **Durables**, **BOM**, and **Recipe** is displayed for the entire Line and Line Sub-Resources. For the Line Resource **Recipe**, the Recipe Parameters can be filled and edited, as shown in the image below:



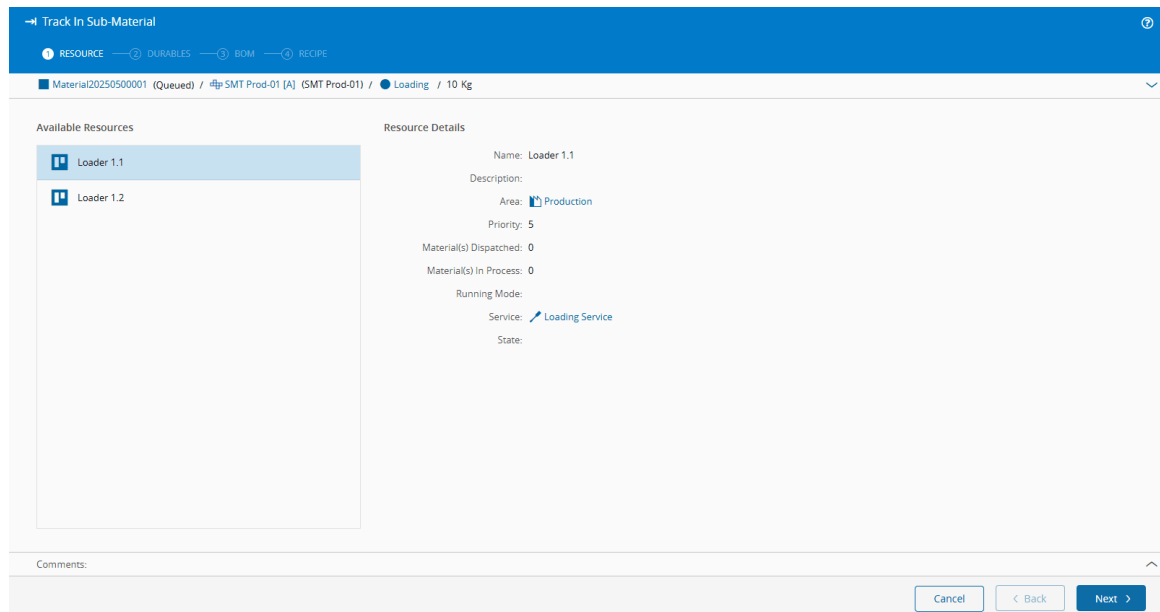
When tracking in the Main Material in the Line Step, the Flow Path of the **Sub-Materials** is defined and the **Sub-Materials** are moved to the first Sub-Step of the resolved Line Flow.

Note

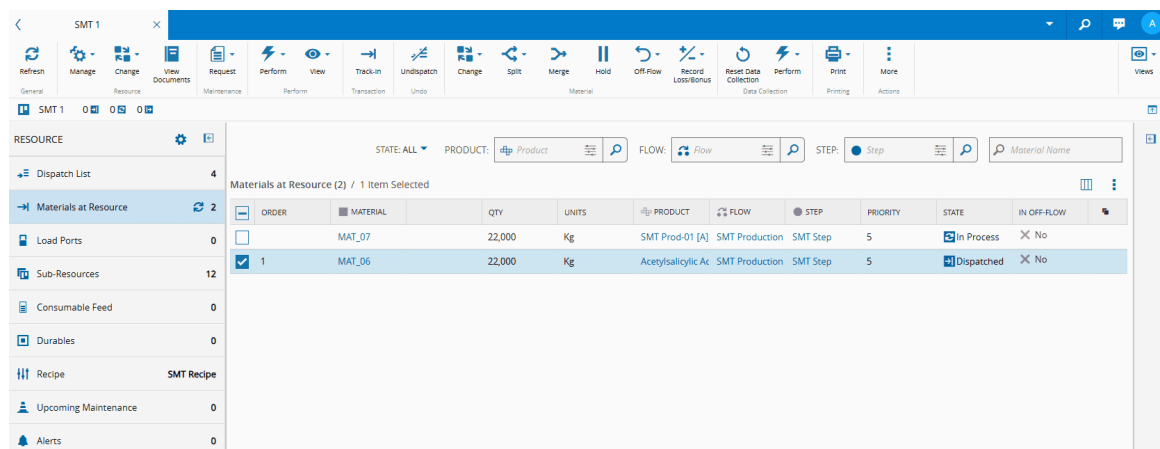
It is not possible to Track-in the Material if the **BOM** associated has Use Mixed Assembly enabled and the Material is in a Line Step.

If the Line Step has the Sub-Material Track State Depth set to **1**, then the **Sub-Materials** can be tracked in, as shown in the image below.

The Assembly in the Sub-Steps may be performed when tracking in the Main Material, depending on the defined Line Assembly Mode:



The **Sub-Materials** can be tracked in and tracked out in the **Sub-Resources** through the Line Resource or Line Step Views, as shown in the image below:

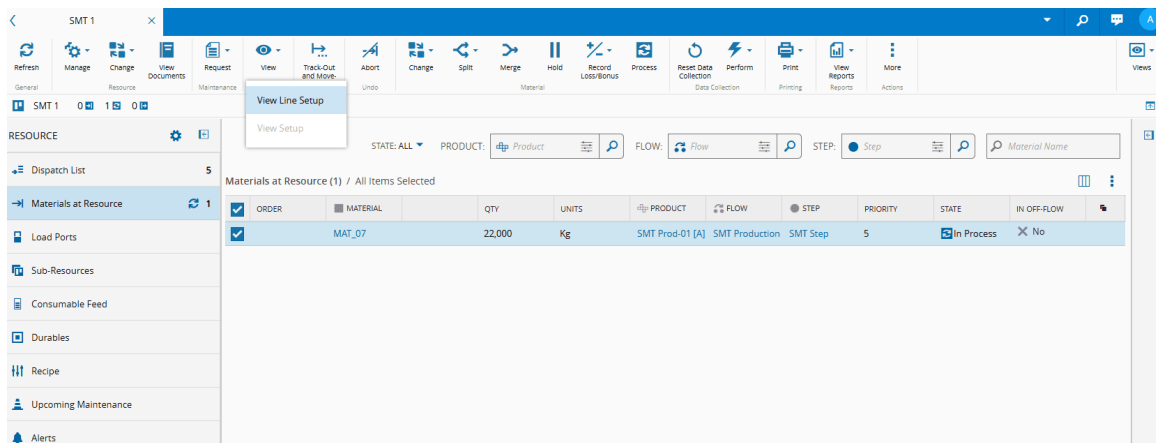


Info

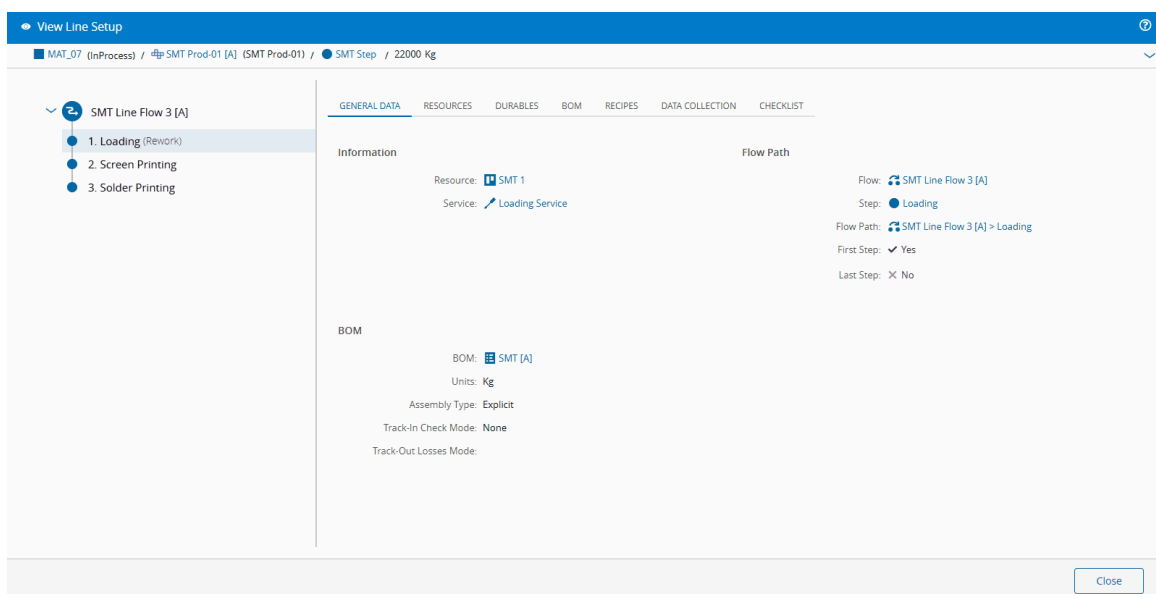
When configured, a Checklist will be resolved and displayed considering the Material Line Step Resource and Material Line Step Recipe contexts for Track-In.

Material Information

After tracking in a **Material** in a Line Resource, the processing information regarding the **Sub-Steps**, **Sub-Resources**, **Durables**, **BOMs**, and **Recipes** of the **Sub-Material** throughout the Line Flow can be viewed in the View Line Setup wizard, as shown in the images below:



The View Line Setup wizard will display the available information in each of its tabs:



Info

This view can be accessed through the Resource View page.

Record Material Losses

To record losses on **Sub-Materials**, you can select the **Sub-Material** and open the Record Material Los/Bonus wizard, or you can select the Top-Most **Material** and opening the Record Sub-Material Losses wizard, as shown in the image below:

Record Sub-Material Losses

MAT_07 (InProcess) / SMT Prod-01 [A] (SMT Prod-01) / SMT Step / 22000 Kg

Sub-Materials

Material20250500001	0 Kg	Final: 10 Kg

Final Quantity: 10 Kg

Sub-Materials Details

Sub-Material: Material20250500001

Quantity: 10 Kg

Reason:

Full Loss: ☒

Quantity Lost (Kg):

Final Quantity (Kg): 10

Comments:

Note

For both wizards, the Loss/Bonus Reasons available for selection are the ones defined in the current Sub-Material Step.

Losses with Loss Step Considerations

When trying to record losses with a Loss Step, you need to know that for the loss to be considered for analytical purposes (such as the Resource and Material Cubes, the Yield, Rate of Quality, and OEE KPIs), then the **Material** where the losses are being recorded must have been processed at the Loss Step.

When attempting to set up this scenario for a Line Step, containing a Line Flow, the following practical considerations are needed:

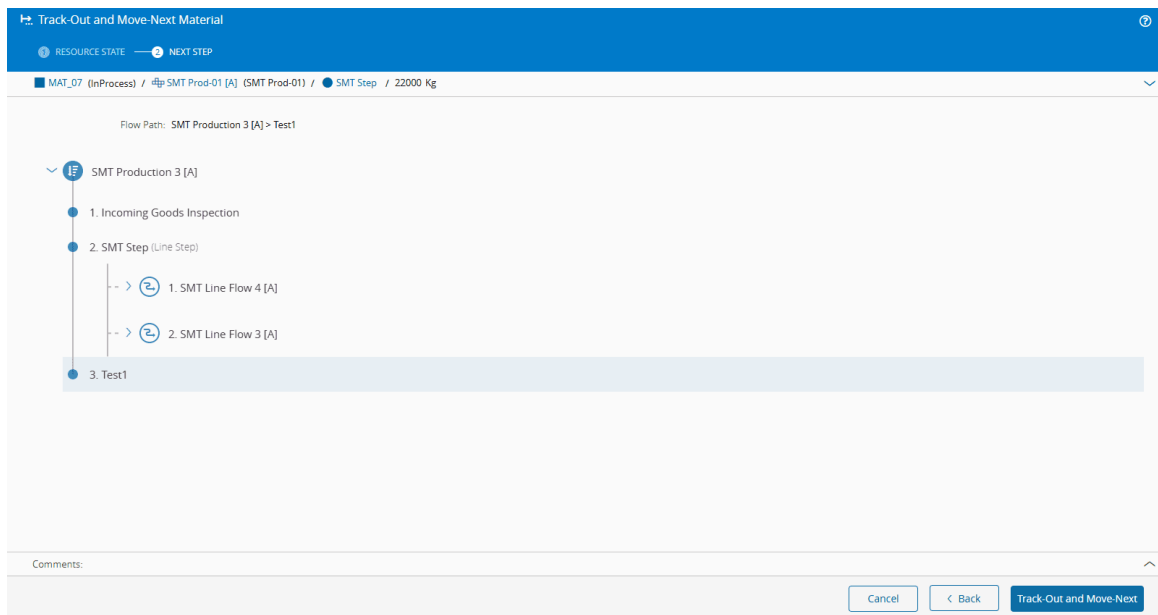
- The Loss Step must be set according to the hierarchy of the **Material** where the Loss is being recorded:
 - If the **Material** is the Top-Most Material, which was processed in the Line Step itself, then the Loss Step should be the part of the Line Step.
 - If the **Material** is a **Sub-Material**, which was processed in the **Steps** of the Line Flow, then the Loss Step should be one of the **Steps** of the Line Flow. Alternatively, it can also be collapsed into the Top-Most Material, and then the loss can be recorded with the Loss Step being the Line Step - consider that, in this last case, the loss will not be traceable to the **Sub-Material**.
- If a Split is required between the Line Step and the Step where the Loss is recorded, then the quantity where the Loss will be recorded must be kept in a **Material** which has been processed in the Loss Step. This means that:
 - If the Loss is in the Top-Most Material, there are two options:
 - The Split occurs when the Original Material (the **Material** that is being split) is in the Line Step, in state In Process or Processed, and the Loss is given in the New Material, that is, the **Material** created during the split.
 - The Loss is given in the Original Material directly.
 - If the Loss is in the **Sub-Material**, there are two options:
 - The Split occurs while the **Sub-Material** has not yet reached the Loss Step in the Line Flow - in this case, the Top-Most Material may be split, with the **Sub-Material** being transferred to the new Top-Most Material.

- The Loss is given in the **Sub-Material** while its Top-Most Material is the Original Material, that is, the **Material** that was processed in the Line Step.

Track-Out Material

The Main Material can be tracked out, as shown in the image below, if the **Step** has the Sub-Material Track State Depth set to **1**, and after all the **Sub-Materials** are processed in the last Sub-Step. If the **Step** has the Sub-Material Track State Depth set to **0**, it is possible to track out the Main Material immediately after it has been tracked in.

The Assembly in the Sub-Steps may be performed when tracking out the Main Material, depending on the defined Line Assembly Mode.



Info

When configured, a Checklist will be resolved and displayed considering the Material Line Step Resource and Material Line Step Recipe contexts for Track-Out.



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