USING WORK IN PROCESS TO MONITOR REQUESTS FOR ART OR OTHER PROCESSES

A previous newsletter discussed in general how to use the Work In Process (WIP) system to track steps in the life of an order. This was the newsletter for October, 2009. Click on the following link to reach the Newsletter page on our website that contains a link to all the old newsletters.

www.lakeshoregroup.com/newsltrs.html

This month I would like to discuss how you can use the WIP system to monitor a specific process or employee. I will use Art as my example but the same procedure will work for any task. You can also use it to monitor jobs assigned to a specific employee.

As new orders are entered that require art, the artist needs to be notified so that the new art can be created. Everyone does this differently. Methods range from the "yell down the hall" method to creating a formal art request document. The method I'm going to describe will create a list of art requests in Lakeshore that the artist can monitor. As new requests are made, each one will automatically be added to the list.

Here's the steps to follow to set up this procedure:

1. Set up an Art process.

You may have already done this. When setting up the process, set the begin and end scheduling dates to be the same as the order date. This will cause the process to show up right away on the scheduled job list.

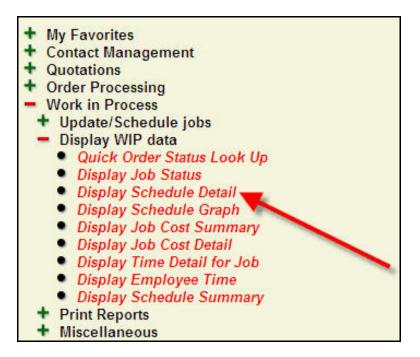
Here's an example.

Process codes			
Process Code: Description: How is this process us Calculation type:	Image: Domotion of the second seco		
Scheduling: Type scheduling:	Include on initial schedule? Image: Ask for units produced? Schedule after order date Image: Begin image:		
Status update e-mails whe	n process marked complete		
100000000000000000000000000000000000000	Istomer/Acknowledgment address? Customer/Ship Confirmation address? Salesman?		
	ecific address(es)		
Text of e-mail:	Image: Second system Image: Second system Image: Second		
Save	Print Plus	Exit	
	Additional variables are available for e-mail text. C	all Tech Support for n	ore information.

If you use process groups, add the Art process to all the groups that require art.

2. Monitor the art process in Work in Process

Go to Work in Process, Display WIP data, Display Schedule Detail



You will be prompted for the process or employee you want to monitor. The date to monitor will default to the current date but you can change it if appropriate. The schedule will also show past due tasks starting with the date you specify. This is usually set to two weeks before the current date so you don't have to keep checking obsolete data.

You will then see the display shown on the following page. It will list all the art requests currently in progress.

There is a link to the order so that the artist can review the details of the order and what art might be required.

If you don't expect to get the art done today, you can click on the "Reschedule this order" icon to go to the scheduling screen and change the end date for the art to the date you expect to have the art ready.

If you have multiple artists, you can have one person to be the "gateway" and go to the rescheduling screen to assign the new art request to a specific artist. Then each artist would call up requests by employee code to see just the art requests he or she is responsible for.

When the art is complete, click on the Update Job Status link to mark the process complete. It will then drop off the list.

If you want to collect information on the time required for the art to be completed, you can click on the clock icon in the last column to access the time keeping function. Click on the icon to go the time keeping screen. Enter your employee code and Submit. When finished, repeat the process to stop the clock. You can also mark the process complete on that screen as well if this is more convenient.

Scheduling screen for process

Review production schedule										
Process: ART Date: 3/28/12							🕅 太 🐍			
			-		4					
Order number	Reference Prior	ity Estimated Required	Time Aiready Logged	Time Scheduled This Date	Ship date	Begin Date	End Date	Reschedule this order	Update Job Status	Update Process Status
<u>002700</u> 🍠					3/30/12	3/27/12	3/27/12		 Image: A second s	٥
002718 🍠		1:00			4/ 6/12	3/28/12			-	0
002719 🍠		1:00		1:00		3/28/12	3/28/12	0	-	0
<u>002720</u>		1:00		1:00	1	3/28/12	3/28/12	0	-	C
	Tota	al 3:00		2:00						
Prov					Exit					Next
Previous proc	cess complete	This process pas	st due!							
_										
										2

Scheduling screen for an employee

Review production schedule										
Employee: Kay Date: 3/28/12	re Keady			Refresh					☆?	
Order number	Reference Prior	rity Estimated Time Required	Time Already Logged	Time Scheduled This Date	Ship date	Begin Date	End Date	Reschedule this order	Update Job Status	Update Process Status
002700 💭 ART					3/30/12	3/27/12	3/27/12	D	. ✓	C
	Tot	al								
Prev					Exit					Next
Previous proc	cess complete	This process p	ast due!							
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You can periodically click on the "Refresh" link at the top of the screen to check for new orders.

Rescheduling screen

Schedule order		
Order number: 002700 💭 📧	Change project finish date here	☆ ⋧
Ship date: 3/30/12		
Clear all dates from schedule	Clear all employee codes from schedule	Reschedule
Include? Process	Begin Date End Date Estimated Time Required Hours : Minutes	
₩ 00005 ART	💭 🗸 🙀 3/27/12 🕼 3/27/12 🕼 着 🛅 🥅 : 🗖 КК 🔎	
		Add a new process
Save	Assign to an employee here	Exit

If you want to schedule additional processes to track like Proofs, Art Approval, etc. you can use the "Add a new process" link on the lower right of the screen to add a new step to the process.