

OptiProERP Scheduling Work Bench User Manual

All Countries

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1. Introduction

Scheduling Workbench (SWB) provides clear visibility to the planning and scheduling task simultaneously to the plan, schedules, all supporting data, and also enables resource planning activity. Schedulers interact directly with the production schedule while receiving real-time visual alerts on capacity, and Raw material availability. The scheduler uses the Scheduling Workbench to rapidly manipulate schedules and simulate results accordingly.

1.1 Who Should Read This Documents

This document is intended for team members who are implementing the software, learning its use, or training another person. This document may also be used by the end user of the product to learn the basics of the screens designed in the software

1.2 Value and Benefits

The primary value you will receive from the Production Scheduling Workbench (SWB) will be more efficient and effective production plan. You will be better able to achieve your performance targets for key customer services. After this implementation, you will get a greater return on manufacturing assets while managing work time and resource availability.

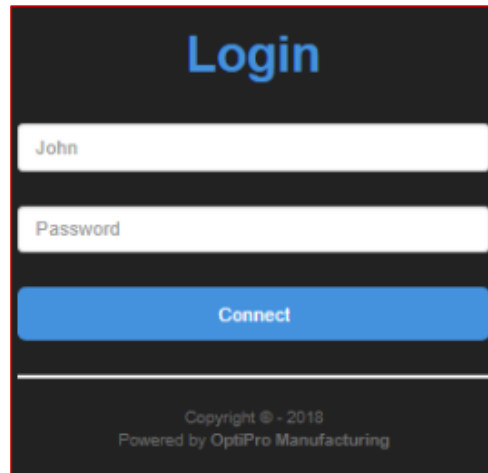
1.3 Key Feathers

- Scheduling Workbench **(SWB)** provides clear visibility of Production Orders and Resource availability and on Time Management.
- Creates multiple Work Order and schedule them simultaneously.
- Calculate Production Order time automatically when the schedule gets change.
- Create various production order for alternative scenarios.
- Quickly recalculate and create new schedules when machines go down or resource not available.
- View and plan the resource load ratio and adjust task to balance resource load.
- Save all the changes locally and push them in the production order when finalized.
- Observe overall Work Order progress and individual operation progress.
- Execute Full-Screen mode, Presentation Screen mode and enable general Keyboard Shortcuts for quick action like **Save**, **Undo**, and **Redo**.
- Scheduling Workbench **(SWB)** shows up-to-the-minute time information, including plans, Production orders, Recourse availability and shop floor feedback.
- This also enables coordination between the production order and resource planning cycle in the multiple time slot such as **(Day/Month/Year)**.

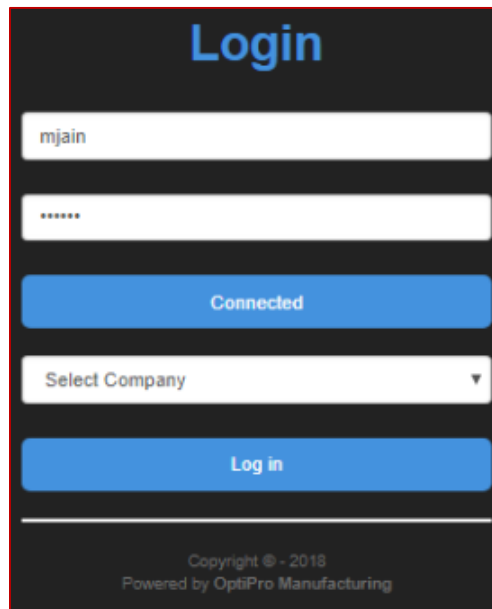
2. Login

Login to the Scheduling Workbench using your login credentials makes your account safe and secure. Enter your login credentials in the respective field provided to you. Once you click to Connect button then login details verifies in the database by system and opens the available company allotted to user. Select the company which you wish to login.

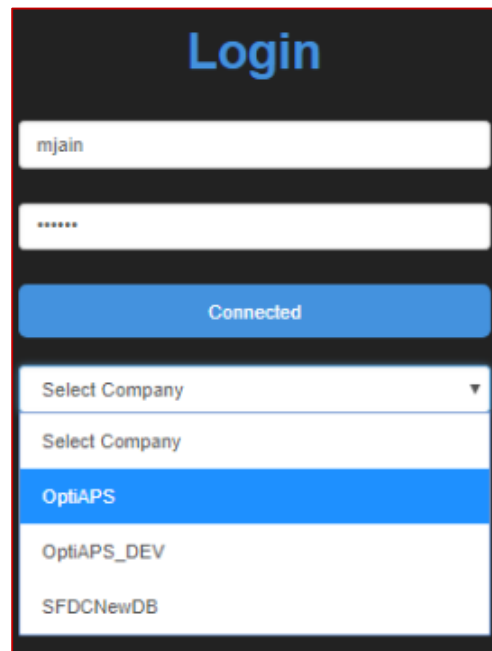
You can also login to single or multiple companies assign to your login at the same time.

A login form with a dark background. At the top, the word "Login" is written in blue. Below it are two white input fields: the first contains the text "John" and the second contains the text "Password". Below these fields is a blue button with the word "Connect" in white. At the bottom, there is a thin white horizontal line, followed by the text "Copyright © - 2018" and "Powered by OptiPro Manufacturing" in a small, light gray font.

1. Enter Username in the User field.
2. Enter Password in the Password field.
3. Click Connect to appears below options



4. From the **Select Company** dropdown menu, select the company which you wish to login.
5. Click the **Login** button.



NOTE – Select Company dropdown menu displays the available company assign to particular login. Select single or multiple companies to login.

3. Dashboard Terminologies

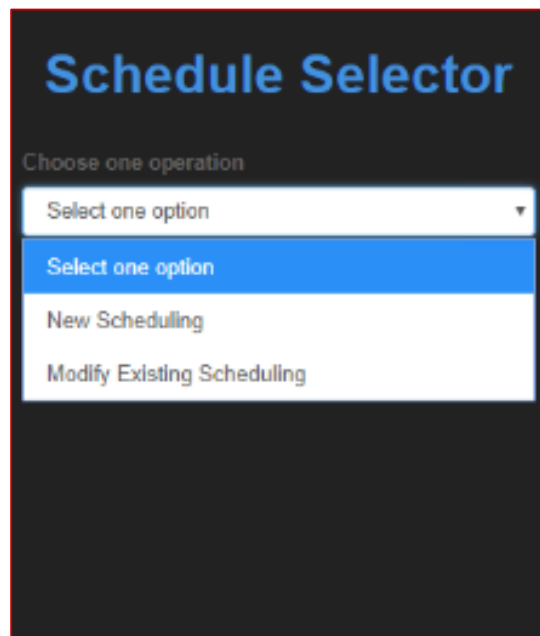
Schedule Selector screen, which allows you to switch to two different scheduling screen, those are **New Scheduling** and **Modify Existing Scheduling**. From the Select one option, drop-down menu select your preferred option accordingly.

3.1 New Scheduling

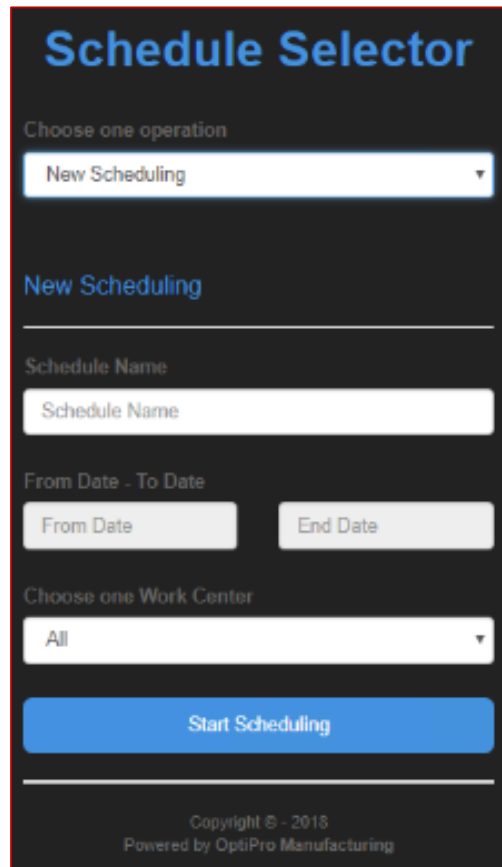
New scheduling option enables you to create a new schedule. You can create a single or multiple work order in one schedule.

Procedure:

1. In the Schedule Selector screen, from Select One Option drop-down menu, select any one options as per your choice.
2. If you are selecting **New Scheduling** then New Scheduling drop-down screen appears to fill the mandatory information.



3. In the Schedule Name blank field, enter **Schedule Name**.
4. Select the schedule start date from the **From Date** calendar.
5. Select the schedule end date from the **End Date** calendar.
6. Select the **Work Center** from the dropdown menu.
7. Click on **Start Scheduling** to continue.



The screenshot shows a web form titled "Schedule Selector" with a dark background. At the top, it says "Choose one operation" with a dropdown menu showing "New Scheduling". Below this, the text "New Scheduling" is displayed. The form includes a "Schedule Name" field with the placeholder text "Schedule Name". There are two date selection fields labeled "From Date" and "End Date". Below these is a "Choose one Work Center" dropdown menu showing "All". A large blue button labeled "Start Scheduling" is at the bottom. At the very bottom, it says "Copyright © - 2018" and "Powered by OptiPro Manufacturing".

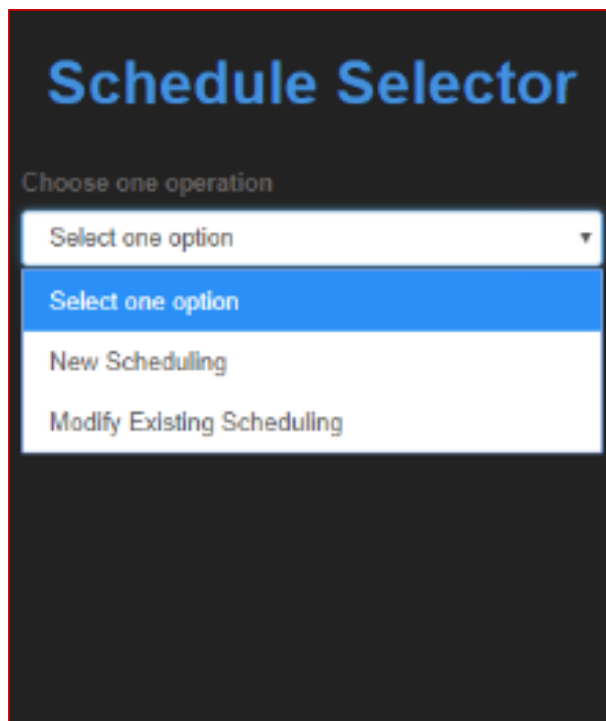
Once you click on Start Scheduling it will redirect you to dashboard screen.

3.2 Modify Existing Scheduling.

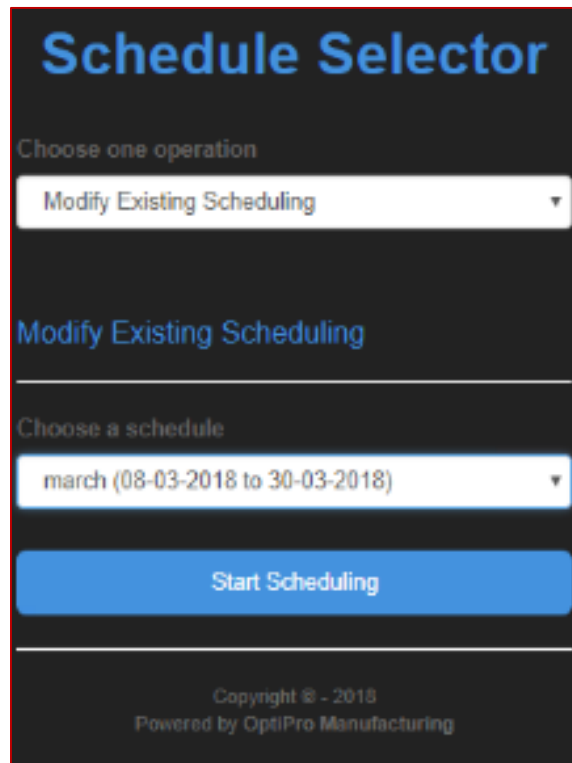
Modifying existing scheduling option enables you to modify your schedule and relaunched it in the production plant.

Procedure:

1. In the Schedule Selector screen, from Select One Option drop-down menu, select **Modify Existing Scheduling**.
2. **Modify Existing Scheduling** dropdown screen appears.



3. From **Choose a Schedule** list drop-down menu, select a schedule which you wish to modify.
4. Click on **Start Scheduling**.



The screenshot shows a mobile application interface titled "Schedule Selector". It features a dark background with white and blue text. At the top, the title "Schedule Selector" is in large blue font. Below it, the instruction "Choose one operation" is in white. A white dropdown menu shows "Modify Existing Scheduling" with a downward arrow. Below this, the text "Modify Existing Scheduling" is in blue. A horizontal white line separates this from the next section. The instruction "Choose a schedule" is in white. A white dropdown menu shows "march (08-03-2018 to 30-03-2018)" with a downward arrow. Below this is a large blue button with the text "Start Scheduling" in white. At the bottom, in small white text, it says "Copyright © - 2018" and "Powered by OptiPro Manufacturing".

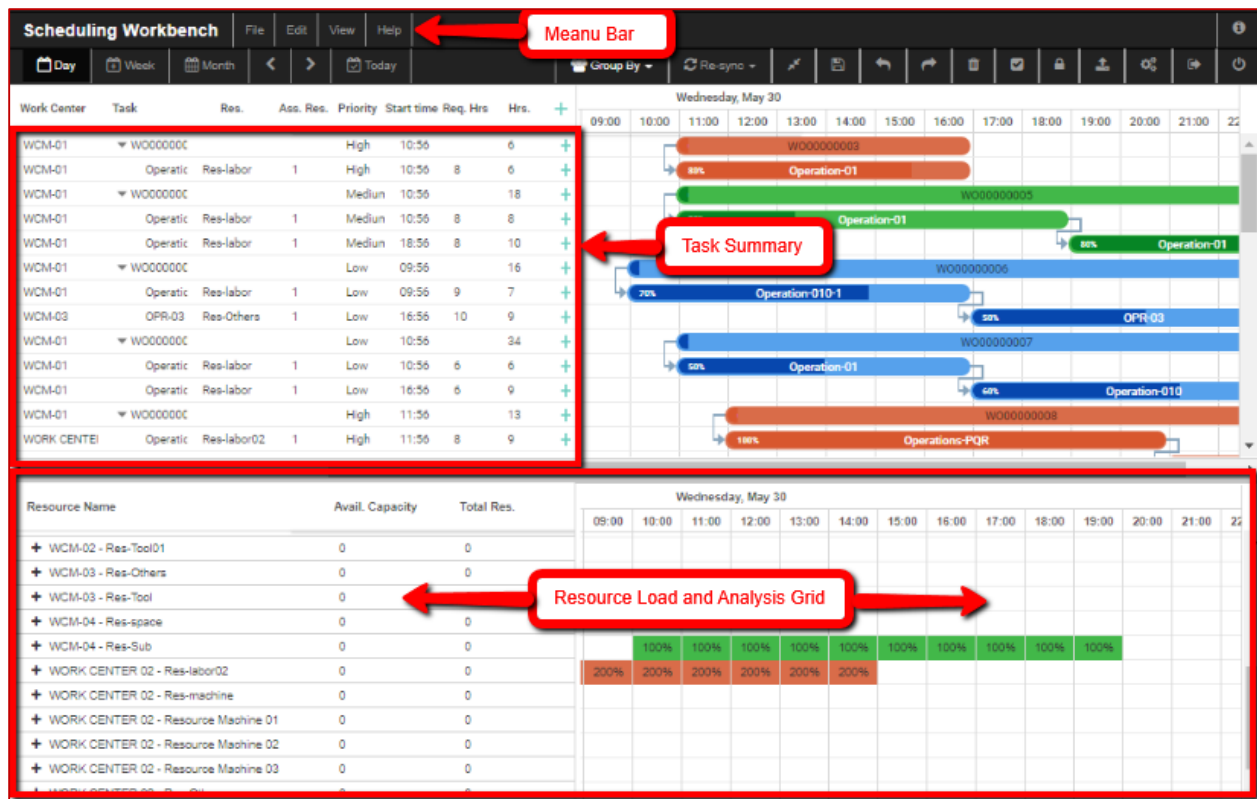
5. Once you click on Start Scheduling, it will redirect you to Dashboard screen.

4. Scheduling Workbench Dashboard

After selecting your preferred option from the schedule selector screen, Scheduling Work Bench (SWB) dashboard screen appears, where you will find many options to manage your work order accordingly.

Screen Terminologies

- Go to the **Menu Bar** on the top of the screen, where you can find multiple dropdown options such as **File Menu**, **Edit Menu**, **View Menu** and **Help Menu**.
- The second bar is a **Quick Action Bar**, where you will find many options such as **Day**, **Week**, **Month**, **Today**, **Group**, **Re-sync**, **Expand**, **Schedule Lock**, **Upload in Production**, **Customization** Screen etc.



4.1 Right Click Menu

Split task and Highlight task are two major option available in the Right Click Menu on the dashboard screen. Split task option enables user to split any task into two separate task which can be process into different time frame as per the availability of the resources. There are two options available in the split task.

NOTE - It is very important that your Mouse Cursor should be on any task from the dashboard screen then only Right Click menu options will appear.

- Split Task
 - Split Task Only
 - Split & Add New Task

The screenshot displays the Scheduling Workbench (SWB) interface. The top section shows a list of tasks with columns for Work Center, Work Order, Task, Ass. Res., Priority, Start time, Req. Hrs, and Hrs. Below this is a Gantt chart view for Wednesday, April 25, showing task bars with their respective durations and resource assignments. A right-click context menu is open over a task bar, showing the following options:

- Split Task
 - Split Task Only
 - Split & Add A New Task
- Highlight Task

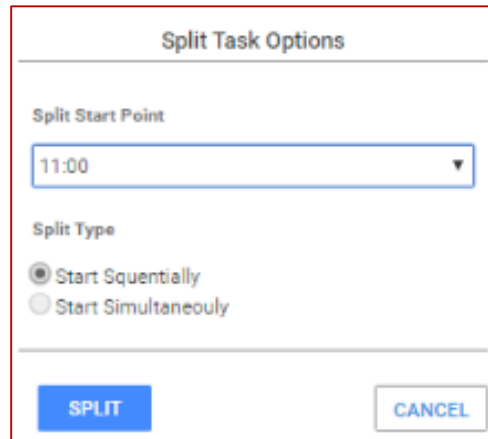
A red arrow points from a text box to the 'Split & Add A New Task' option. The text box contains the following instructions:

Click on Split task, if you just want to split the task or click on Split & Add New Task, if you want to split and Add New Task in between the existing task.

The bottom section of the interface shows a resource list with columns for Resource Name, Avail. Capacity, and Total Res. The resources listed include WCM-02 - Res-Tool01, WCM-03 - Res-Tool, WCM-04 - Res-space, and WCM-04 - Res-Sub.

Split Task only – This option enables user to split task into two different task as per the “Split Start Point” timeframe and “Split Type” selection. Once you click on split task and Split Task Options popup will appears. This popup enables you to select time frame and splitting type.

For example: - If the task is scheduled between 9AM to 6PM which is already half completed then, if you will split this task based on the “Split Start Point” timeframe and “Split Type” selection, task will be separated into two different task.

A screenshot of a 'Split Task Options' dialog box. The dialog has a title bar 'Split Task Options'. Inside, there is a section 'Split Start Point' with a dropdown menu showing '11:00'. Below that is a section 'Split Type' with two radio buttons: 'Start Sequentially' (which is selected) and 'Start Simultaneously'. At the bottom of the dialog are two buttons: 'SPLIT' and 'CANCEL'.

1. From the **Split Start Point** dropdown, select the starting time from where you want to split the task.
2. Select the **Split Type** radio button.
3. Click the **Split** button to split the task.
4. Click on **Cancel** button, if you do not want to split selected task.

Split & Add New Task – This option enables user to split task into two different task and allows to create a new task in between the split task for the any listed reasons from the popup menu.

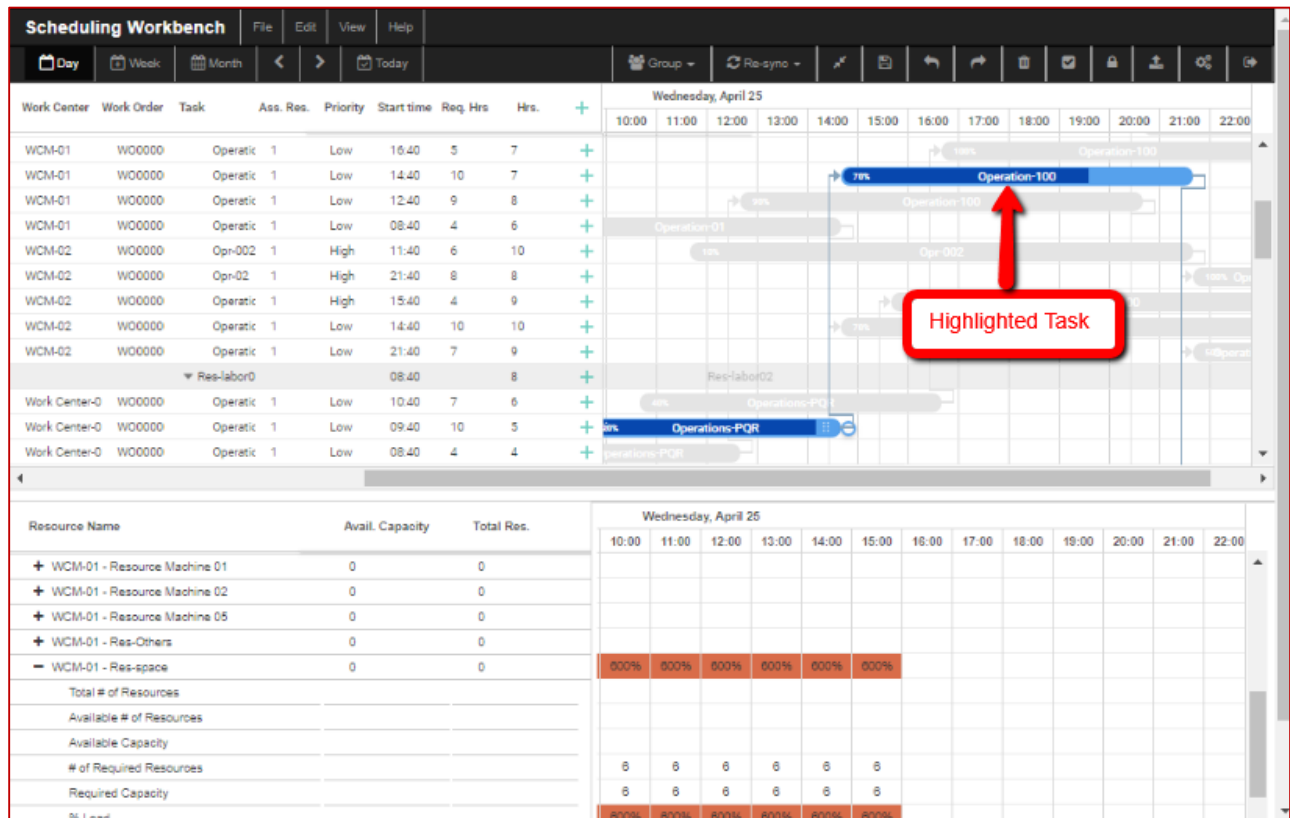
The screenshot shows a 'Mid Task Details' form with the following fields and annotations:

- Operation Code:** A dropdown menu with 'Breakdown, Maintenance...' selected. A red box highlights this field with the text 'Select the Task Type reason from the dropdown menu.' and a red arrow pointing to the dropdown arrow.
- Task Type:** A dropdown menu with 'Setup' selected.
- Split Start Point:** A dropdown menu with '13:00' selected. A red box highlights this field with the text 'Select the Split Start Point time from the dropdown menu.' and a red arrow pointing to the dropdown arrow.
- Time Period:** A section with a minus button, the number '5', a plus button, and the word 'Hours'.
- Buttons:** 'SPLIT' (blue) and 'CANCEL' (grey) buttons at the bottom.

1. From the **Task Type** dropdown menu, select the reason of splitting task.
2. From the **Split Start Point** dropdown menu, select starting time for splitting task.
3. Click the **Split** button to split the task.

Task Highlighting – Highlight task is a great option available in the right-click menu. This will enable user to highlight any task to add more attention or priorities task to the dashboard screen. Select the task which you wish to highlight and then click on Highlight Task.

NOTE - Task Highlight option will enable only when you have applied filter in the Dashboard screen. You can apply any of the filter options available in the Group dropdown menu in the action bar. Select Group by Priority or Group by Resource to proceed.



Remove Highlighting - You can also remove the highlighted task and your screen will convert to normal dashboard screen. Follow the below given procedure to remove highlight from the task.

1. Right click the **Highlighted Task** and then click on **Remove Highlight**.
2. The highlight will be removed and normal Dashboard screen appears.

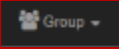
The screenshot displays the Scheduling Workbench (SWB) interface. The top menu bar includes 'File', 'Edit', 'View', and 'Help'. Below the menu, there are tabs for 'Day', 'Week', 'Month', and 'Today'. The main area shows a Gantt chart for Wednesday, April 25, with a list of tasks on the left. A task is highlighted in blue, and a context menu is open over it, showing options like 'Split Task' and 'Remove Highlight'. A red arrow points to the 'Remove Highlight' option, and another red arrow points to a 'Click Here' button below the menu.

Work Center	Work Order	Task	Ass. Res.	Priority	Start time	Req. Hrs	Hrs.
WCM-01	WO00000008	Operatic	1	Low	16:40	5	7
WCM-01	WO00000010	Operatic	1	Low	14:40	10	7
WCM-01	WO00000011	Operatic	1	Low	12:40	9	8
WCM-01	WO00000012	Operatic	1	Low	08:40	4	6
WCM-02	WO00000013	Opr-002	1	High	11:40	6	10
WCM-02	WO00000013	Opr-02	1	High	21:40	8	8
WCM-02	WO00000014	Operatic	1	High	15:40	4	9
WCM-02	WO00000015	Operatic	1	Low	14:40	10	10
WCM-02	WO00000016	Operatic	1	Low	21:40	7	9
▼ Res-labor0							
Work Center-0	WO00000008	Operatic	1	Low	10:40	7	6
Work Center-0	WO00000010	Operatic	1	Low	09:40	10	5
Work Center-0	WO00000011	Operatic	1	Low	08:40	4	4

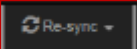
Resource Name	Avail. Capacity	Total Res.
WCM-01 - Res-labor	5	5
WCM-01 - Res-labor02	0	0
WCM-01 - Res-machine	0	0
WCM-01 - Resource Machine 01	0	0
WCM-01 - Resource Machine 02	0	0
WCM-01 - Resource Machine 05	0	0
WCM-01 - Res-Others	0	0
WCM-01 - Res-space	0	0
WCM-01 - Res-Sub	0	0
WCM-01 - Res-Tool	0	0
WCM-01 - Res-Tool03	0	0

4.2 Quick Action Bar


Quick action bar gives you access to operate your SWB in shortcut method. All the function which are available in File menu, Edit Menu and View menu are also available in the quick action bar.

1. 

Group by priority option enables you to prioritize your information based on the Task and Resource.

2. 


The re-sync option enables you to refresh your data and task which are in-progress status. You can also set the auto-refresh timing which will update data automatically.

3. 


Expand and Collapse option enables you to expand and collapse your task on the task screen. Select the task and then click on expand.

4. 

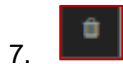
Save as Draft option enables you to save your modification in the local file and then only you can submit the modification for production release.

5. 

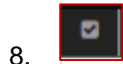
The Undo command allows you to undo the last action you performed in the program. It has a standard shortcut “Ctrl+Z”

6. 

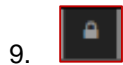
The Redo command allows you to do undo action again. It has a standard shortcut key “Ctrl+Y”



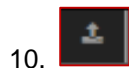
Delete command allows you to delete the task from the scheduler screen, which is created normally or by mistakenly.



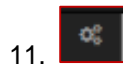
This option allows you to complete the task, those tasks which are already completed in the production and still showing in-progress. Select the task and click on Complete Task.



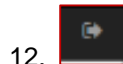
This option allows you lock the task. Select the task which you wish to lock and then click on lock tab.



This option enables you to move your task to production. It is very important that first, you save modification to the local file and then move to production for final release.



Configuration option enables you to open a configuration popup screen, which allows you to set task color, default SWB software theme and their Indent margin as per your preference.



This option allows you close the current plan and go back to scheduler screen to choose different plan by using same login details.



The sign out options allows you sign out from SWB and re-direct you to the login screen. Enter your login ID, password and select the company to re-login again.



Current Schedule Details popup shows the logged-in current Company Name, Plan Status, Schedule No, Schedule Name, “From and To Date” and Current Work Center. Once the plan is pushed to production then the status will change to “Pushed” status.

Configuration Screen- Configuration option enables you to open a configuration popup screen, which allows you to select task color, default SWB software theme and their Indent margin as per your preference.

Work Center: - This option allows you to filter out the data on the dashboard, by this option you will be able to switch between work center and load the dashboard for specific work center by default this option is set to all.

Default Task Color Coding: - This option allows you to select color coding by **Priority** or **By Task Type** basis. Select the 'Task Color' and 'Progress Color' according to your choices for High, Medium or Low priority. The Task will be displayed in selected color on the dashboard screen.

Default Resource Load Layout: - This option allows you to select None or Basic Layout or Detailed Layout. The information will be displayed in the selected layout on the dashboard screen.

Configurations

Chart Settings

Work Center

All

Default Task Color Coding

By Priority

Priority	Name	Task Color	Progress Color
1	High	#d96c49	#d8572e
11	Medium	#42b849	#068525
31	Low	#56a1ec	#0747ae

Un-highlighted Task Color

#e4e4e4

Default Resource Load Layout

Detailed Layout

None

Basic Layout

Detailed Layout

Resource Time Line

Balance Load

#42b849

Personalization

Default Theme

Default Rich

Default Timeline View

Day View

Task Column Width

50

Chart Table Row Height

25

Chart Header Scale Height

50

Left Panel Width

580

Left Panel Enable Resizing

☒ True
 ☐ False

Enable Keyboard Shortcuts

☒ True
 ☐ False

Task Popup Enable Dragging

☒ True
 ☐ False

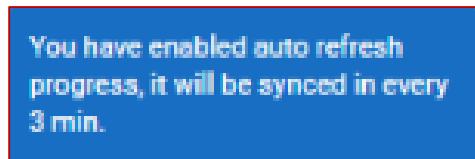
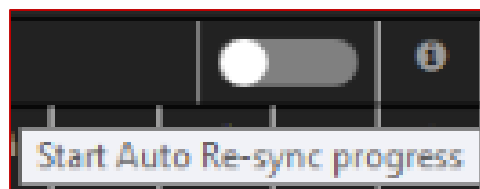
Save & Reload

Close

Enable Auto Resync: - This option allows your dashboard screen to AutoResync/Refresh automatically according to the selected time duration. For Example, if you have chosen “Auto Resync Duration 3 in Min” then your dashboard screen will automatically refresh in every 3 minute.

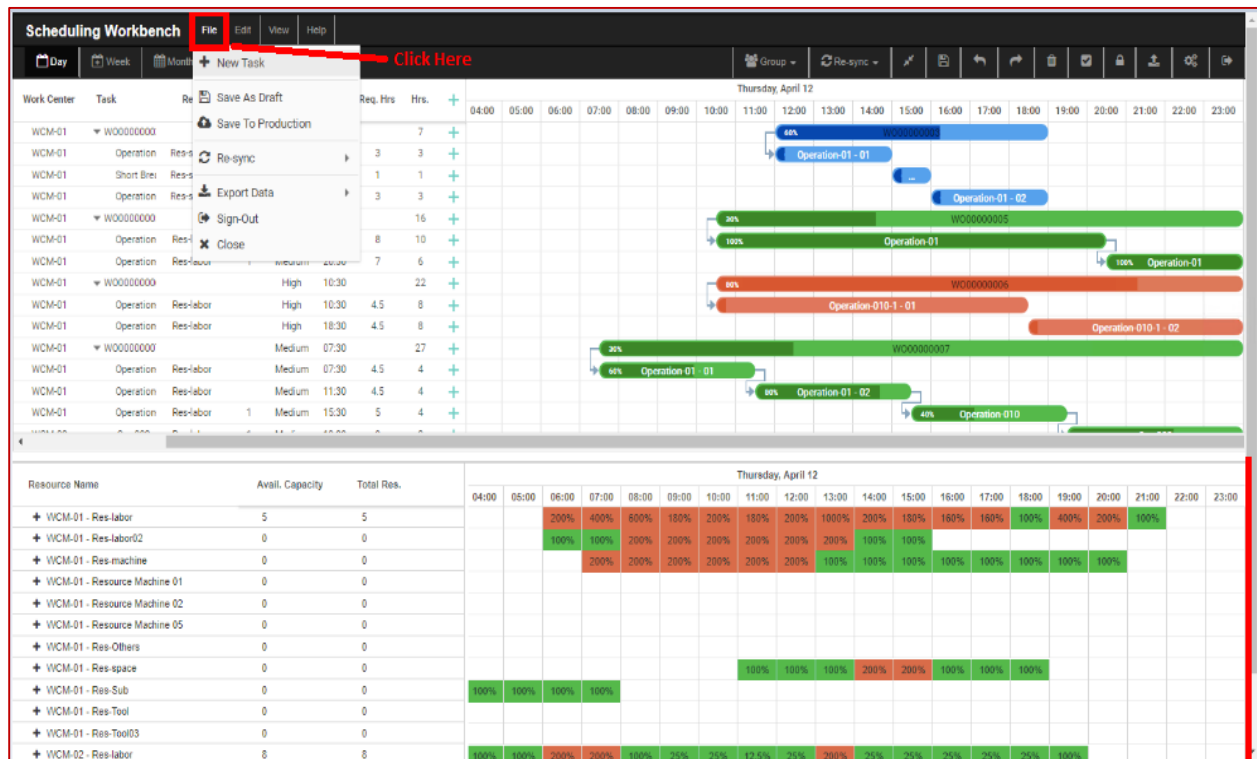


ON/OFF Auto Resync: - After enabling Auto-Resync from configuration screen, ON/OFF option appears on the dashboard screen. Use this button to ON/OFF Auto-Resync from the dashboard screen.



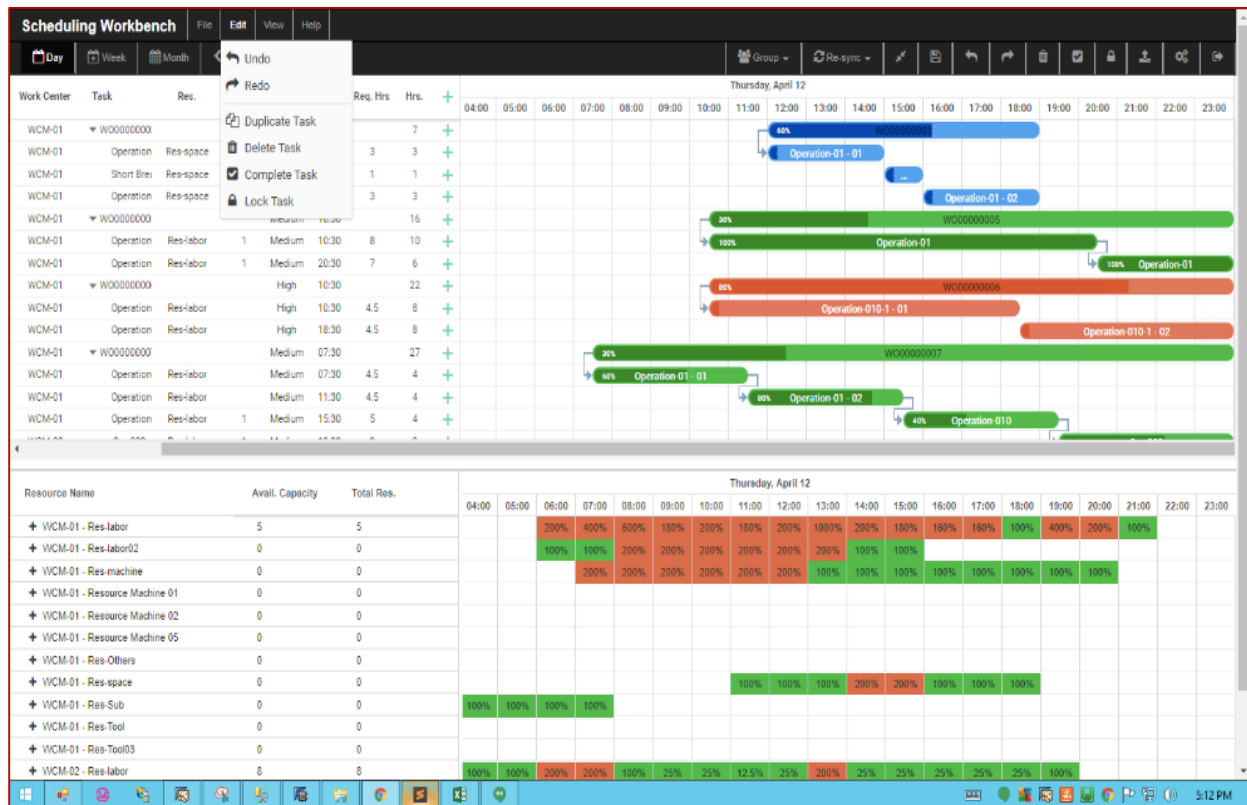
File Menu- Expanding file menu shows the multiple options given below.

- **Save As Draft-** This option enables you to save your modification in the local folder. Every modification must be saved in the local file and then only it can be deployed to **Save to Production** for final release.
- **Save To Production-** This option enables you to save and released your final modification for the production release.
- **Re-Sync-** This options makes your data refreshed and updated in the dashboard screen.
- **Export Data-** This option enables you to export your data in the soft and hard copy into different format such as : - PDF,
- **Sign Out-** This option enables you to sign out your SWB software completely and switch to welcome login screen. Enter your login ID and Password to login again.
- **Close-** If you have open multiple schedules screen and want to close single schedule screen then this option enables you to close your current schedules screen.



Edit Menu- Expanding edit menu shows the multiple options given below.

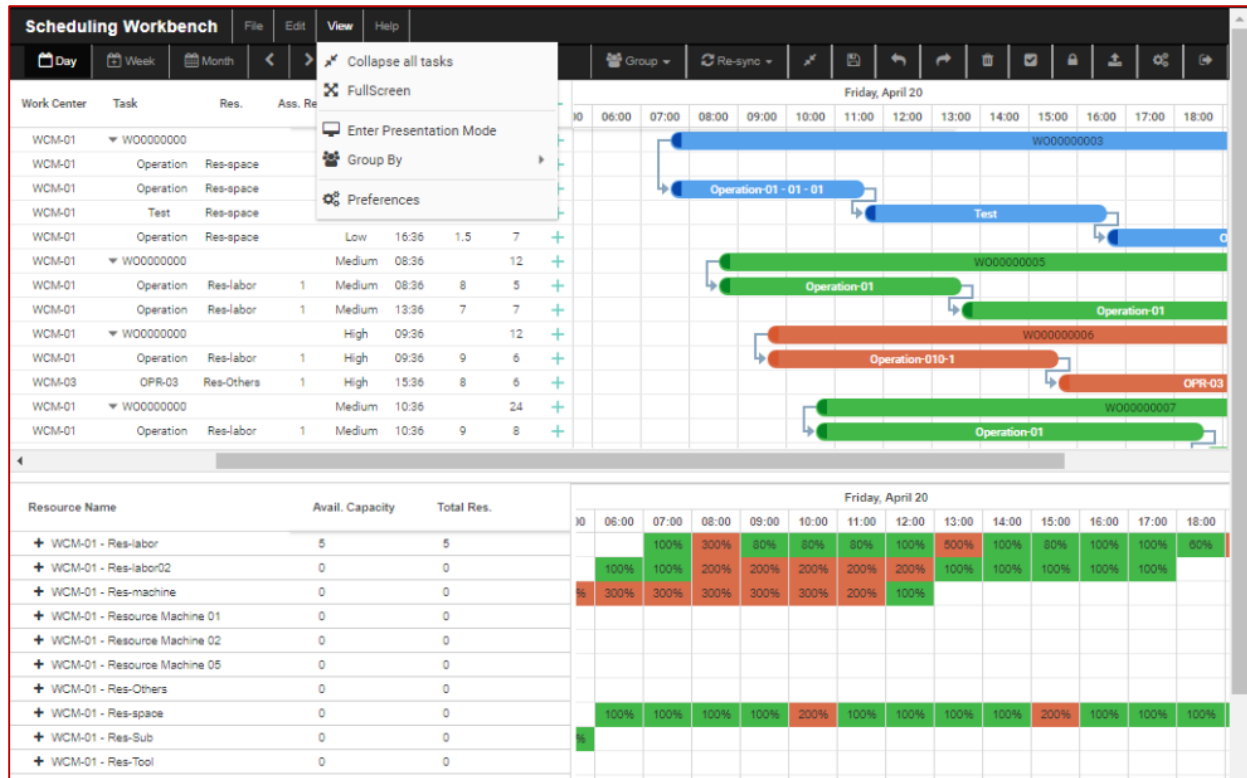
- **Undo and Redo**- This option enables you to make necessary modification Undo and Redo accordingly.
- **Duplicate Task**- If you want to create a similar task, which is already been created then this option enables you to duplicate your task. Select the task and then click on the Duplicate task to create duplication.
- **Delete Task**- This option enables you to delete your task permanently, select the task which to wish to delete and then click on **Delete Task** in the Edit menu.
- **Complete Task**- This option enables you to complete your running task. If your task has been already completed and displaying as in-progress then select the particular task and click on **Complete Task**.
- **Lock Task**- This option enables you to lock your particular task. Select your task which you wish to lock and then click on **Lock Task**. You cannot modify the particular task after locking the task.



View Menu- Expanding view menu shows the multiple options given below.

- **Collapse/Expand All Tasks-** This option allows you to collapse your all task on the dashboard screen. If your tasks are already in collapsed status then this option will turn to **Expand All Tasks** to see the details further.
- **Full Screen-** This option enables you to expand your dashboard screen as a full screen. Go to the View menu and click on **Full Screen** to expand your screen.
- **Enter Presentation Mode-** This option enables you to open your dashboard screen in a Presentation Mode. Go to the View menu and click on **Enter Presentation Mode**.
- **Group by-** Group by enables you two different option for filter your screen.
 - **Group by Priority-** This option enables you to filter your dashboard screen by Group by Priority basis to display your priority schedules information.
 - **Group by Resource-** This option enables you to filter your dashboard screen by Group by Resource basis to display your priority information.

- **Remove Grouping-** This option enables you to remove your all applied filters and convert into the normal dashboard screen.



- **Preferences-** This option enables you to open a configuration popup screen, which allows you to set task color, default SWB software theme and their Indent margin as per your preference.

Configurations

Chart Settings

Work Center: All

Default Task Color Coding: By Priority

Priority	Name	Task Color	Progress Color
1	High	#e0765c	#d8572e
11	Medium	#42b849	#068525
31	Low	#56a1ec	#0747ae

Un-highlighted Task Color: #e4e4e4

Default Resource Load Layout: Detailed Layout

	Balance Load Color	Over Load Color
Resource Time Line	#42b849	#d96c49

Personalization

Default Theme: Default Rich

Default Timeline View: Basic Terrace

Task Column Width:

Chart Table Row Height:

Chart Header Scale Height: 50

Left Panel Width: 580

Left Panel Enable Resizing: True False

Enable Keyboard Shortcuts: True False

Task Popup Enable Dragging: True False

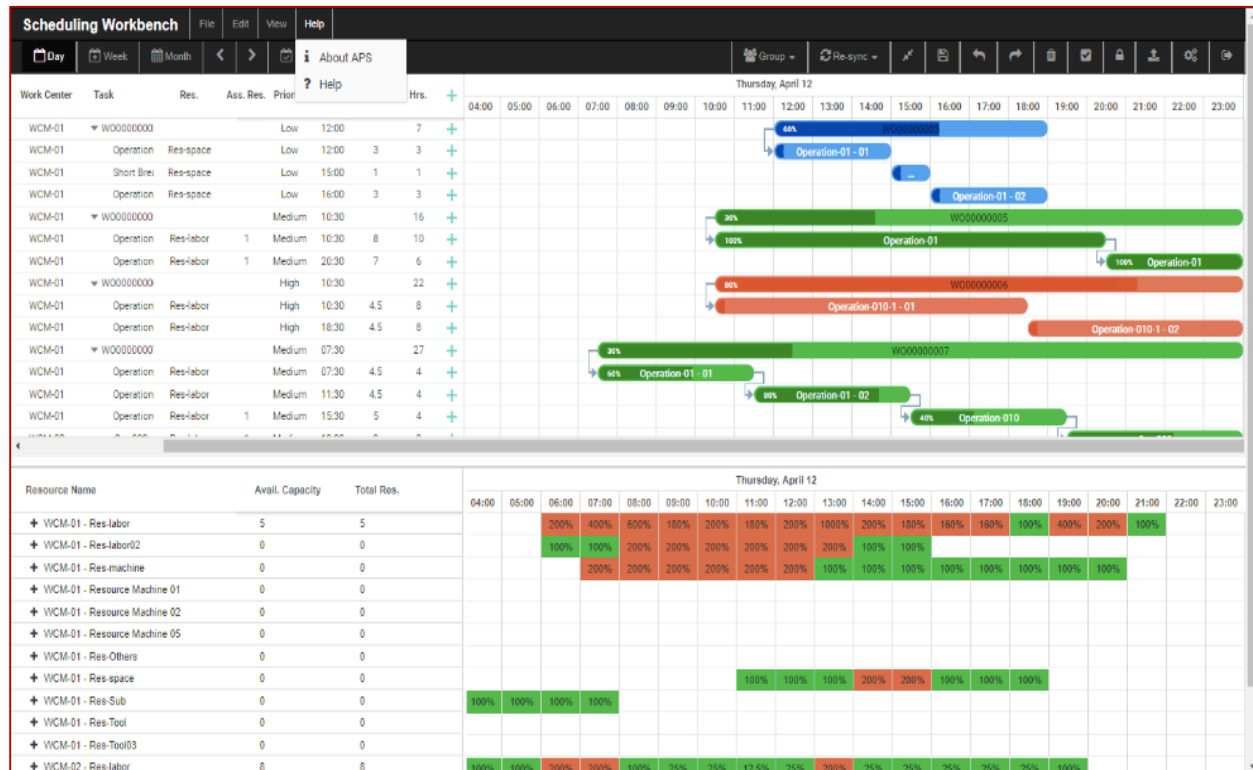
Task Popup Height: 120

Task Area Font Size: 12

Save & Reload
Close

Help Menu- Expanding help menu shows the multiple options given below.

- **About APS-** About 'APS' screen enables you to provide complete SWB detailed information such as Version, Copyright, and License details.
- **Help-** Help options enables you to find out solutions to the problem which will occur during task operation and work order schedule management. There will be frequently asked questions and answers (FAQ) to resolve your problem.



4.3 Managing Dashboard Screen by Time Frame

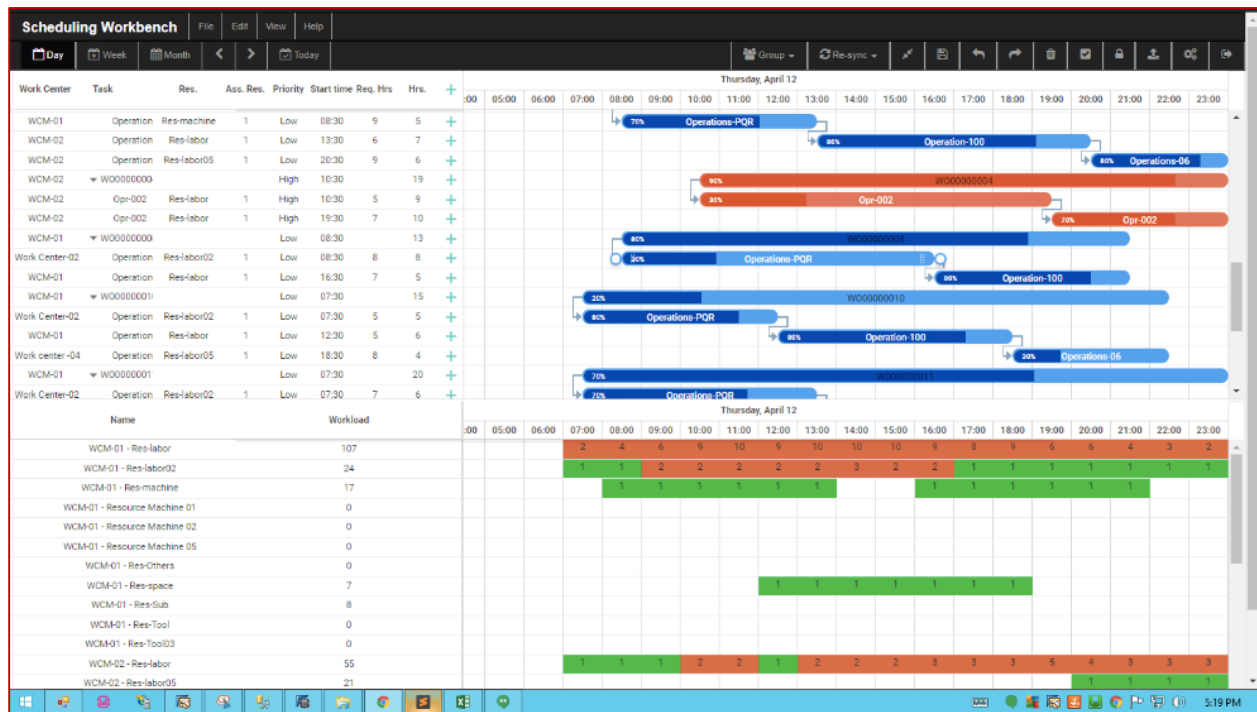
Dashboard screen can be managed according to the time frame to display Work Order Schedules. There are mainly four-time frame options available, select any one of the time frames and it will display scheduled work order in that particular time frame. The available time frame is **Today**, **Day**, **Week**, and **Month**.

Today Time View-

This option enables you to view your Scheduled Work Order on the same day or today. By using Today button you will redirect to today screen from any of the screen. The below screen display the tasks which are newly added, modified or deleted on the same day. You can also see the task start and end time in the **Task Summary Bar**.

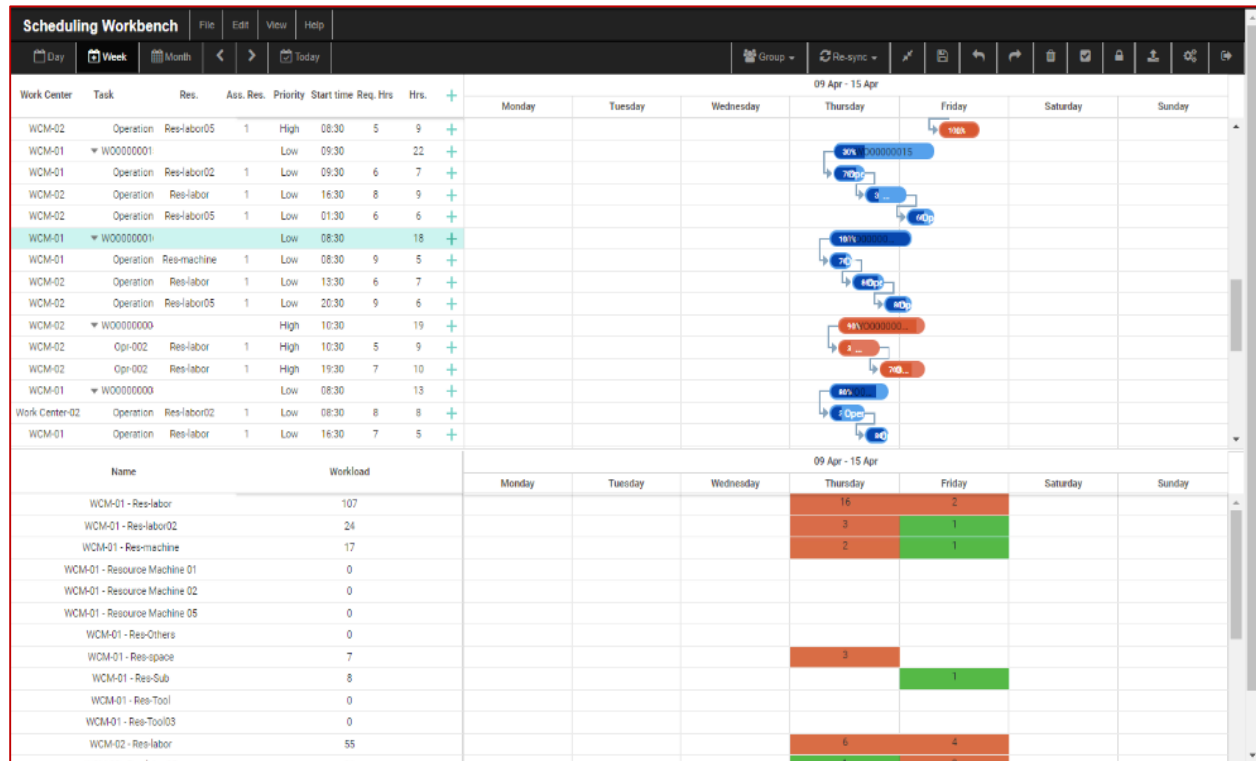
Day View-

This option enables you to view your Scheduled Work Order in the Previous Date. You can select the particular Date or Day from the calendar and below screen display the related information for the selected date.



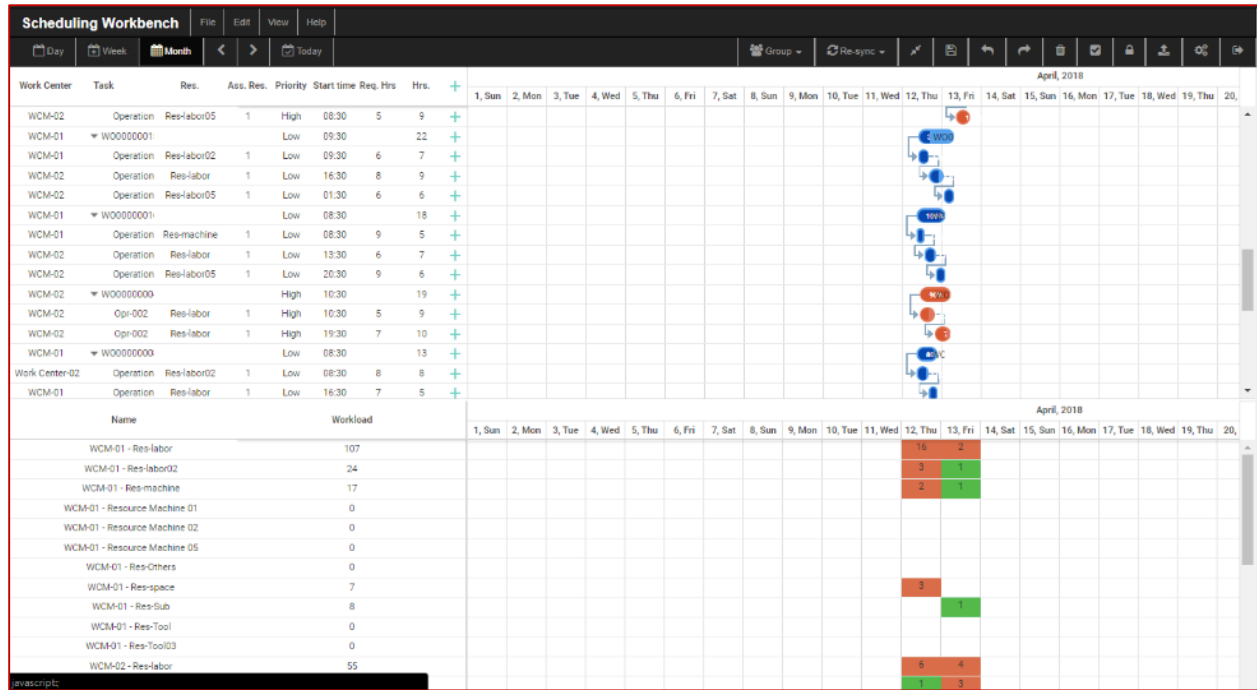
Week View-

This option enables you to view your Scheduled Work Order in a Week Time Frame. You can select the particular week from the calendar and below screen display the related information for the selected week.



Month View-

This options enables you to view your Scheduled Work Order in a Month Time Frame. You can select the particular Month from the calendar and below screen display the related information for the selected month.



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