

# Resource Manager-DB

## Quick Steps to Success

### 1. Introduction & Installation

Thank you for your interest in Resource Manager-DB; the vastly improved, database version of Resource Manager for Excel.

<b>RM – Excel</b> 1 concurrent User	<b>RM – DB</b> Multi-User, Security, improved functions, features, runs with Jet engine database (same as Access).
<b>RM-DB Excel Based Report Writer</b>	

These *Quick Steps to Success* instructions, along with a web demo and trial software will enable you to quickly evaluate some of the general features of Resource Manager-DB. Please call us at (248) 486-1934 for a web demo and see how the system can meet your specific needs. Also, you can order the complete product for a *risk free* evaluation.

### System Requirements

- Windows 95, 98, 2000, XP, NT running on stand alone PC or Network. Minimum of a Pentium 2, 500 MHZ with 48 MEG RAM, and 25 Meg hard drive available space. Does NOT require Microsoft Access.
- Excel 97 or greater installed (for reports).

### No Rules & Quick Implementation

In contrast to other shop control, MRP or manufacturing software offerings, Resource Manager-DB does not have a rigid, standard procedure for every application to follow. Rather, Resource Manager-DB is designed to adapt to *your* requirements. In addition, you can use existing data in other systems. Finally, the system is geared towards minimum effort for upkeep and maintenance. It all adds up to very quick implementation, immediate success, and ease of future changes.

PLEASE CALL US IF YOU HAVE ANY QUESTIONS about how to configure and run Resource Manager-DB for your needs. We are committed to your success and would love to hear from you.

### Quick Steps to Success Overview

There is a simple three-step process for basic running of Resource Manager-DB:



The remainder of this *Quick Steps to Success* will give you a quick tour through each of these areas: Initialize, Schedule, and Report. As the system diagram shows, you can exchange data with other systems at any time in the process.

### Quick Steps to Success Table of Contents

1.	Intro, System Requirements, Installation	1-2
2.	Main Menu, Navigation	2
3.	Initialization: Options	3
4.	Initialization: Daily Hours	3
5.	Initialization: Products	4
6.	Initialization: Workcenters/Operations	5
7.	Initialization: Building BORs	5
8.	Scheduling: Sales Orders	7
9.	Scheduling: Schedule Grid	8
10.	Scheduling: Resource Calendar	9
11.	Scheduling: Inventory Calendar	10
12.	Scheduling: POs	11
13.	Scheduling: Feedback	11
14.	Reporting:	12
15.	Summary:	13

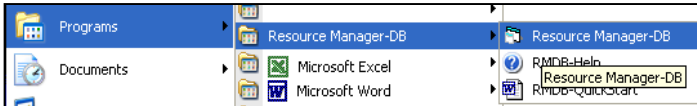
## Installation

Follow instructions per media: from Resource CD, click on Trail, or from download, double click on the setup.exe file. For any version warnings, always choose to KEEP your existing files.

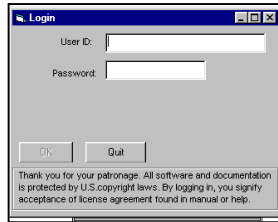


## Signing On – Login

To run Resource Manager-DB, select Start, Programs, Resource Manager, Resource Manager-DB.



User Id = Demo and Password = 123456 and press [OK].



**[ACTION STEPS]:** Throughout this Quick Steps to Success Guide, there will be *Action Steps* that you can use to get a feel for the system.

## UP AND RUNNING

There are several resources to ensure a successful start, including:

1. Call *US* at (248) 486-1934 for a friendly web demo based on your requirements. Due to the flexibility of the product, there is more than one way to address your application. This is why we encourage you to give *US* a call and let us summarize how to run Resource Manager-DB to meet your specific needs and create custom reports.
2. Follow these Quick Steps to Success w/ Sample Data.
3. Help files
4. Tool Tips: Short, context sensitive, comments.

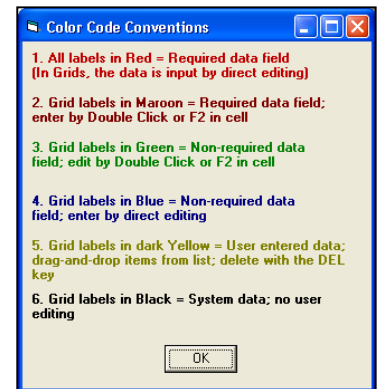
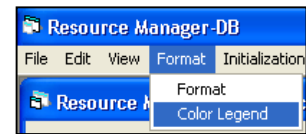
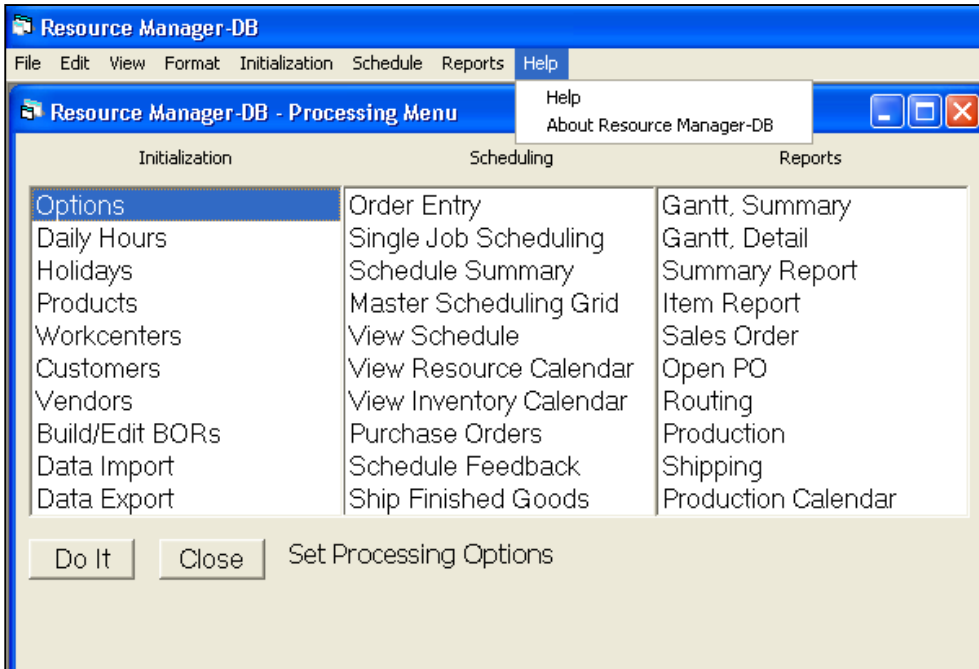
## 2. Navigation

There are two choices for running Resource Manager-DB:

**Main Resident Menu:** This is the active menu on start up and will remain active unless the [CLOSE] button is pressed. This is the recommended method of Running Resource Manager-DB. All commands are available for all areas. Simply double click directly, or single click and chose [Do It]. The menu is organized in three blocks: Initialization, Scheduling, and Reports.

**Top Menu:** The top, standard Widows-type menu contains all commands in Main Resident Menu, plus a few extra (including View, Main Menu to call back Main Resident and on-line Help). Windows Short-Cut keys apply here.

**Action Steps:** Click *Format*, *Color Legend* to review color codes. [OK].



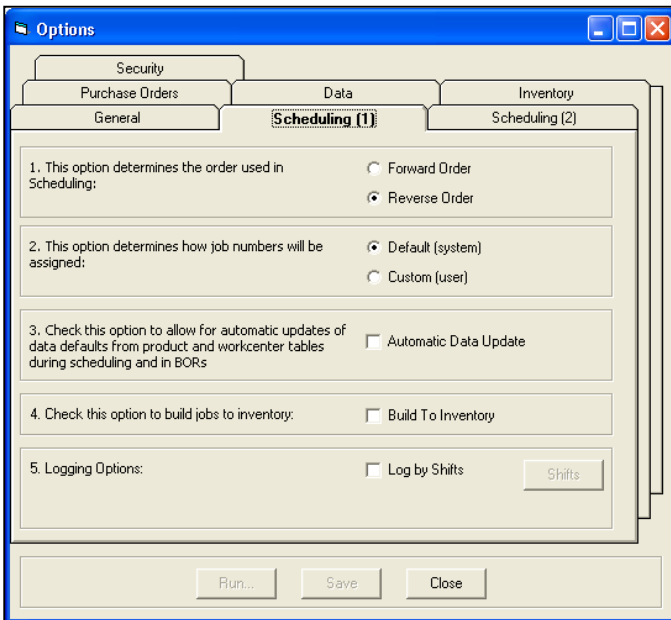
### 3. Options

**Action Step:** Press [Options - Do It] and click on the **Scheduling (1) Options Tab**. Or, just Double Click on **Options**. You can always just double click on the menu selections.



Note item 1 on the Scheduling (1) Tab - Schedule according to Forward or Reverse Order. Forward Order indicates that when scheduling your products, jobs, etc. you will be providing a start date, and RM-DB will calculate the finish dates (subject to capacity restraints, inventory levels, job priority, etc.). Reverse Order indicates that you will provide a finish date, and RM-DB will calculate the start dates. All of these options may be adjusted as you find necessary; the defaults are just initial global settings. These options can be changed at any time, even on a per Job\Order basis. This allows for virtually any combination (i.e. estimated Jobs entered as Forward, firm orders as Reverse) to co-exist in the system.

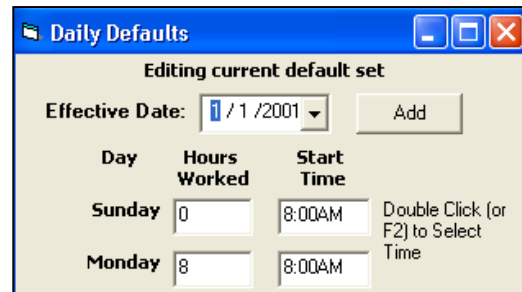
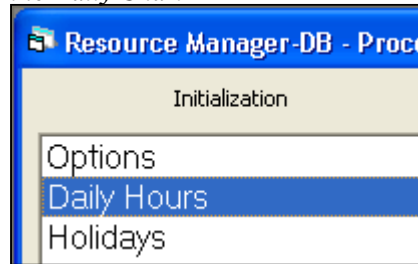
**Action Step:** Press other Option Tabs to view various settings, then [Close] to close options screen and return to main menu.



### 4. Daily Hours

For capacity planning and scheduling according to workcenter hours, you can tell the system what hours you normally work per day and a list of holidays. These global settings are done in the Daily Hours and Holiday sections.

**Action Step:** Press [Daily Hours - Do It] to review/edit the Daily Chart



**Action Step:** Press [Close] or X to return to Menu. Note, start time plus Hours Worked is less than midnight.

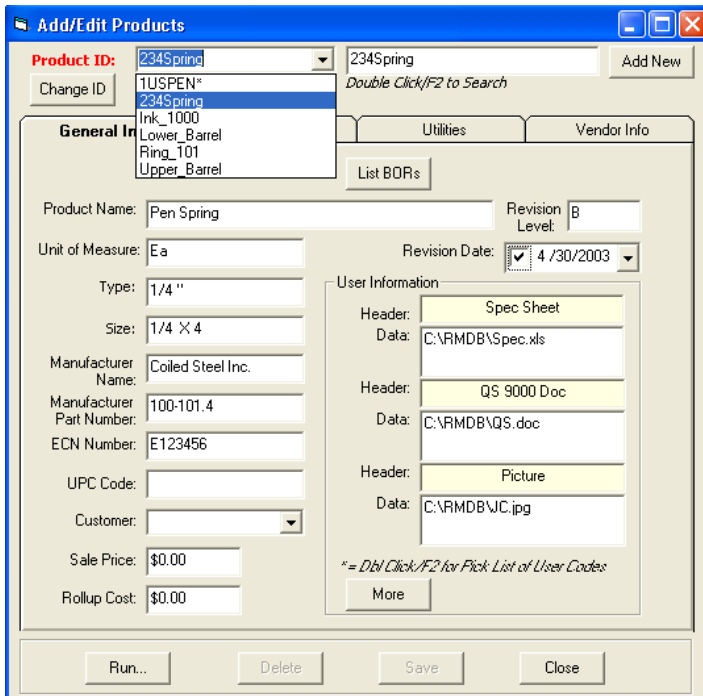
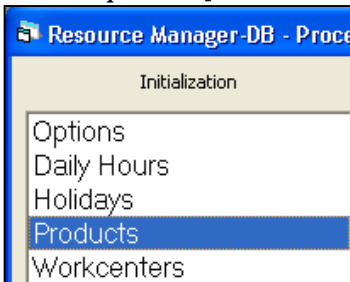
In a later section [View Resources Calendar] the user can configure detailed calendars. Each Workcenter can have its own, unique, working day calendar that can be adjusted upon demand.

The Daily Chart, like the rest of the configuration options throughout Resource Manager-DB, may be changed at any time, with the updates being applied to the NEXT scheduling event (new or reschedule). This enables you to schedule a mix of options (hours available, forward or reverse, resources available, etc.) for different Jobs.

**Note to Job Shops, Make-to-order Manufacturers, Contract Manufacturers, etc.** The remainder of this *Quick Steps to Success* uses sample data for a standard product (a common ball point pen). This is just for an example of how to touch on each part of the system, and not how you would necessarily set-up and run Resource Manager - DB for your operation. For now, **please follow through this example and then call US** to discuss options for setting up and running Resource Manager for your needs.

## 5. Products

**Action Step: Press [Products – Do It]**

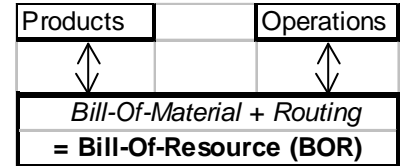


**Action Step: Using Product ID Search/Scroll Box, choose [234Spring]. Note! The search/scroll box is used throughout Resource Manager-DB and will automatically search for first letter of what is being typed, or user can scroll to find desired product. The second search widow, to right, is for full text searching and instant adding. The Product Name field also shares the full text-searching feature (double click or F2 to activate).**

The Product List contains raw materials, other vendor related items, sub-assembly and end product listings. All Products, with a Bill-Of-Resource associated with it, are denoted with asterick \* and listed on top. The Add/Edit Products form also contains Inventory Parameters and allows direct inventory transactions.

**Action Step: click on and review other Tabs.**

**NOTE: You LIST items (products & operations/workcenters) in the Master Item Lists, and define some of the attributes details. You put them together (BOR, JOB, BOM, PROJECT, PRODUCT, BATCH, etc.) later. You can also start directly with the BOR and add products on the fly.**



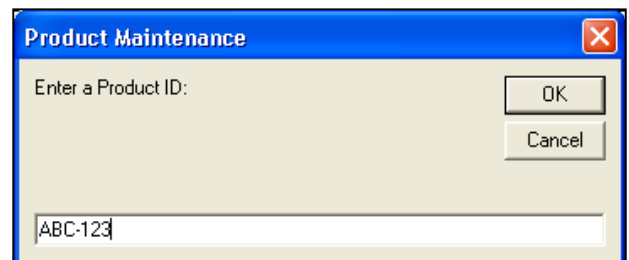
**Side note regarding Data Import:** Normally, the VERY FIRST step in configuring Resource Manager-DB is to determine if ANY needed data exists in ANY system.

Check out the Data Import Function for a summary list of just some of the data we can automatically import. Then, call us and/or send samples of your existing data and we will be glad to show you how to easily integrate Resource Manager-DB with most any system.

The possibilities are tremendous. We can import BOMs and add routings on the fly, import open sales orders and WIP data, run what-if reports, even closing the loop by writing back (to other system) to adjust schedule dates. Call *US* to discuss your options.

**Action Step: Press Button [Add New]. Type in ABC-123 for Product ID, then [OK], [No] to use existing product as template.**

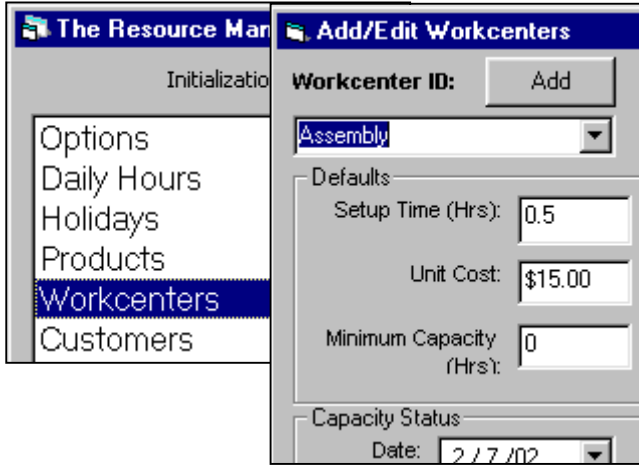
**Action Step: From General Info Tab, Type in New Product for Name, add other information as you wish, then press [Save], [OK], and [Close]. You can add a new product from any of the three Add/Edit Products tabs.**



You can also add new products on-the-fly while Building BORs.

## 6. Workcenters/Operations

**Action Step:** Press [Workcenters] [Do It]. Search\Scroll and choose [Assembly].



General workcenters, labor, resources, machines, work cells, etc., are maintained here. Workcenters / Operation descriptions can be defined here, or made specific in the BOR. This list contains resources that consume hours and will be scheduled *subject to the hours per day available, and hours required*. The Number Available is how many of that resource you have. This number (which can be less than one) is multiplied by the hours in the day chart, to configure the *initial available capacity* for each Workcenter. In our example, we have 16 hours (Res. Mult. = 2 X 8 hrs. /day) available for Assembly and 8 hours for Inspection. The initial available capacity is displayed in the Resources Calendar and can be edited directly for individual Workcenter calendar definition.

Other key features of the Workcenter Form include global settings for Set-up times, hourly rate to run (Unit Cost), and more. Note that all of these settings can be defined for each Job, Production, and BOR.

Capacity Status provides an instant view and adjustment for capacity.

Out of order flag, with replacements, allows the user to take a resource out of schedule and replace with another.

## Customers & Vendors

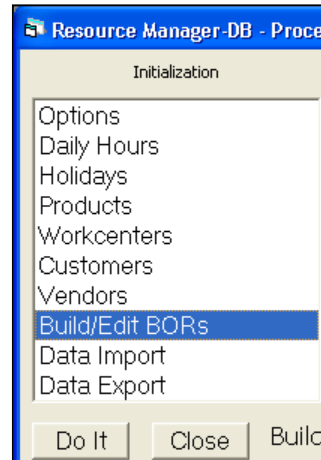
Simple tables that integrate with Order Entry, Purchase Orders, and all reporting.

## 7. Build/Edit BORs

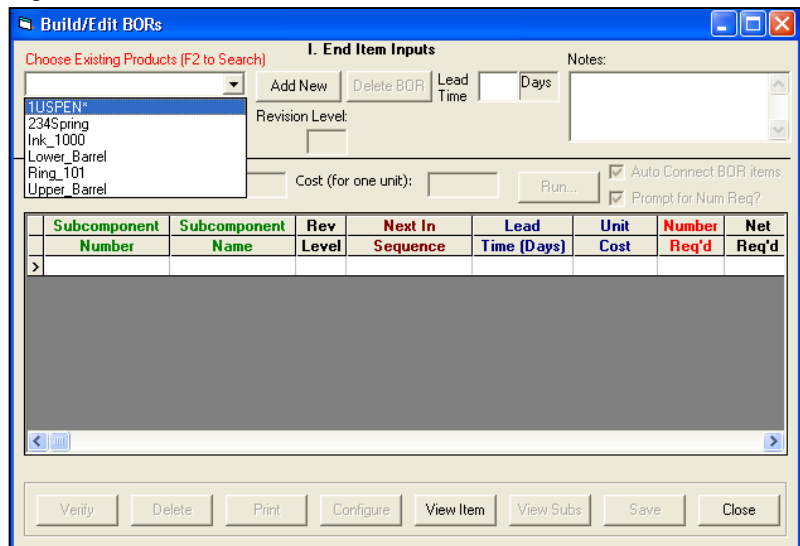
The Bill-of-Resource (BOR) is the configuration of the Products and Operations that make up your finished product, Job, or project. To create a BOR simply select components off of the Products & Workcenter lists, however you wish, allowing for concurrent scheduling of Workcenters and Materials. Building a BOR for your particular product configuration is easily done with the complete production version of Resource Manager-DB. We recommend that *you call US today to answer any questions that you may have about constructing a BOR that accurately models your processes*. For this tour, we will just view an existing Bill-Of-Resource (BOR) for a Ball Point Pen.

### Building/Editing BORs

**Action Step:** Press [Close], if needed, to return to Main Menu. Press [Build/Edit BORs][ Do It] from Main Menu.



**Action Step:** Choose IUSPEN from search\scroll box.



## The Bill-Of-Resource Table

The **Header** area contains summary information about the current BOR. Choose Existing Products allows user to view/edit existing BOR (as in our example, denoted by asterisk), or to choose a Product for Building a New BOR. The Lead Time, for the End Item, is extra days added for final processing (shipping, etc.) once all sub components are done. The Cost (for one unit) is a total of all sub component costs. Estimated Days to Complete is how many days it will take to manufacture the End Item. This will be adjusted by all capacity restraints when scheduled. Revision Level and Notes are available.

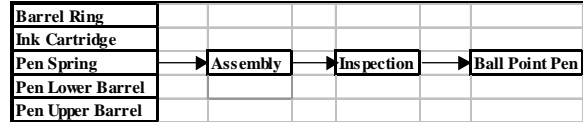
**GREAT FEATURE:** Throughout RMDB, you may notice a gray RUN button. This feature, configured initially under options, allows the user to call an external program and automatically pass information. For example, you can include a path and file name, for an Autocad Drawing, and click on it to automatically run Autocad and pull up drawing. Or, use it to connect to Vendors Website.

Subcomponent Number	Subcomponent Name	Rev Level	Next In Sequence	Setup Time (Hrs)	Unit Cost	Hours Req'd	Net Req'd	Sequence Number
> Upper_Barrel	Pen Upper Barrel		Assembly	2	\$0.05	1	1	1
> 234Spring	Pen Spring	B	Assembly	3	\$0.05	1	1	2 P:\
> Lower_Barrel	Pen Lower Barrel		Assembly	2	\$0.05	1	1	3
> Ink_1000	Ink Cartridge		Assembly	1	\$0.15	1	1	4
> Ring_101	Barrel Ring		Assembly	0	\$0.01	1	1	5
< Assembly	Assemble the Pen		Inspection	0.504	\$15.00	0	0.504	6
< Inspection	Inspect the Pen		1USPEN	0	\$15.00	0.024	0.024	7

**GREAT FEATURE:** If you need to build a new Job, Product, etc., and you haven't listed the End Item in Product List yet, simply press the Add New and add it on the fly! You can use any existing BOR as a template for the new, or quickly add sub component products, sub assemblies, and operations from scratch.

The **Subcomponent Grid** contains a list of all the products and operations that go into making the End Item. The *Next In Sequence* Number is what the Product goes into, or what follows after an Operation.

For example, in the diagram, all the products on the left have Assembly as the *Next In Sequence*, while Assembly has Inspection as *Next In Sequence*, and finally, Inspection has the end product/end item – Ball Point Pen – as the *Next In Sequence*.



As Products and Workcenters/Operations are added to BOR, default data as defined in Product and Workcenter lists will fill in automatically. These can be edited directly for setting BOR specific parameters.

Required entries are formatted in Red. Editable fields include: Set-Up and cycle times for Operations, Lead times, Quantity required, and Vendors for Products, Costs and

User Fields.

Advanced options are included under the **[Configure]** button for each line item. To delete a row, click on row and press Delete button.

The options for Auto Connect BOR items and Prompt for Num Required are special tools to help automate the building BOR process.

**Action Step:** To add items to the 1USPEN BOR, simply double click or F2 on first cell of blank row. You can select a Product ( for example ABC-123), or Workcenter or press **[ADD NEW]** new Product or Workcenter **ON THE FLY!** Enter Number Required (1),

and press **[Save]**. Congratulations – you have just edited a BOR!

To change visual sequence, edit Sequence Number and double click on Sequence Number Header. **GREAT FEATURE:** Most Grids in Resource Manager-DB can be instantly sorted by clicking header. Left click is ascending, right descending. To change Next in Sequence, double click or F2 in cell. Press **[Close]** to exit Build/Edit Bors.

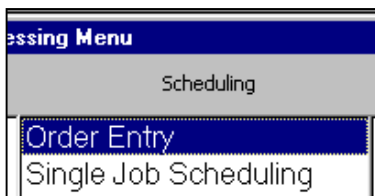
## Data Import and Export

These sections provide fantastic flexibility for integrating in information from other systems and generating custom reports. Please contact us to help you with setting up and automating import masks and custom report options.

## 8. Scheduling: Order Entry/Sales Order

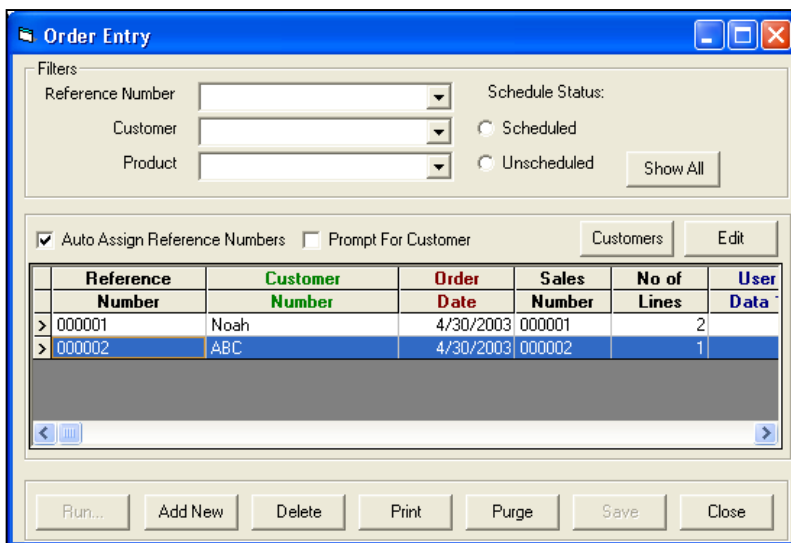
Well Done! We have now reviewed Initialization up to Build/Edit BORs and are ready to deliver the core benefits – scheduling, tracking, and reporting.

There are several options available to enter demand (orders) and schedule. Call US to discuss which area works best for you (Importing from existing systems, Order Entry, Single Job Scheduling, Forecast Scheduling). For this example, we will look at Order Entry only. *Action Step: If needed, press [Close] to return to Main Menu then Press [Order Entry][Do It].*

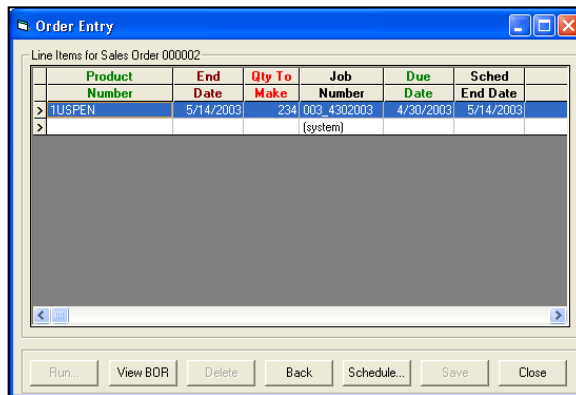


The top section of the Order Entry/Sales Order form contains various filters to view orders.

All orders found are listed by Reference Number, which allows you schedule multiple line items all tied to a common reference number. To view an Order, for a Reference Number, double click or click and press F2.



The line items, for an Order, are displayed for edit (or new entries).



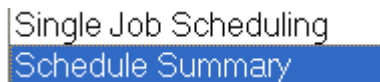
To add a new product, double click or F2 in Product Number cell of blank row. Use the Date Picker to pick START or END date for this line item. You can change dates, quantities, and scheduling option flags (forward, reverse, etc.) in the next section (Master Scheduling Grid).

**Great Feature!** The Order Entry area is an excellent place from which to run Resource Manager-DB. You can manage all of your forecasted demand, actual orders, when due or when to start, etc. You can also enter a custom Job Number, Work Order Number, or Sales Order Number, etc. You can even import in the demand schedule from outside systems (import button). Finally, you can view and edit the details of any BOR, even adding new Jobs, Products, and Operations, on the fly -- all from Sales Orders.

*Action Step: From Order Entry/Sales Order Form, (Press Back or Close then Order Entry) Press [Add New]. Enter a single line item order, double click Red Columns to complete. Note the View BOR button. Press [Save] and [OK].*

Printing Sales Orders offers the same features as printing BORs, Purchase Orders, etc. That is, you can customize the format and fields to be included and send to Rmrpt.xls, and/or print a hard copy.

In the Rmrpt.xls, you can further customize – adding logos, user defined fields, on-the-fly calculations, freeform notes, etc.

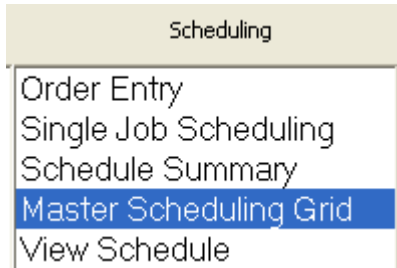


Single Job Scheduling is ideal for testing BOR explosions and quickly adding a Job to Master Schedule. Schedule Summary is a great place for Build-To-Inventory Master Scheduling.

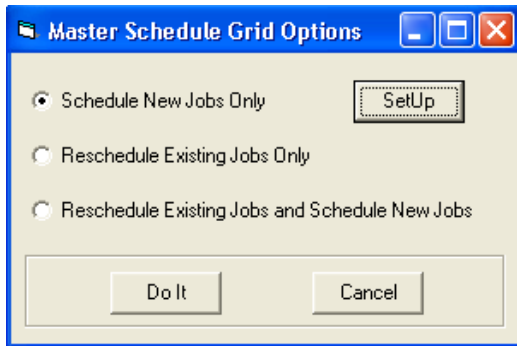
## 9. Schedule

Once you have entered your demand, you are ready to generate a schedule.

**Action Step:**  
Press [Master Scheduling Grid][Do It]



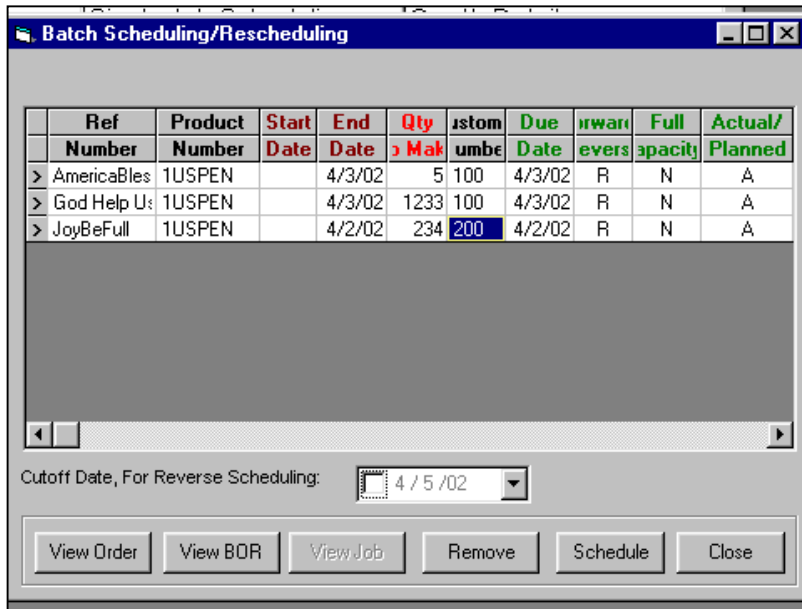
The Sub Screen allows you to choose between scheduling new jobs only, or to reschedule existing, both.



The SetUp button allows you maximum flexibility to pre-sort the exact order you want for scheduling all activity.

### Great Feature! Check Out SetUp before you Schedule.

Since the system assigns capacity and available inventory in the sequence the Jobs (each line item on order is a Job)



are scheduled, you can define your custom, default priority sorting criteria via SetUp.

**Great Feature! Scheduling Grid allows for maximum flexibility for viewing Jobs to be scheduled, dates, and quantities. Double Click on editable fields to change flags, quantities, etc. Click on View Orders to edit quantities, dates, add lines, even Change the BOR, assigning unique resource multipliers, etc. Another great, on-the-fly feature.**

**Action Step:** Click on [Schedule] button.

Resource Manager-DB will sequentially read in each BOR, perform the explosion (quantities, chained lead times, capacity restraints, scheduling flags, MRP and Inventory transactions, etc.) and add to the master schedule.

**Action Step:** Click on [View] button.

The actual schedule database, as viewed from View Schedule, provides scheduling information about all Jobs. It is good idea to verify dates, quantities, etc. right here to ensure you have set desired options correctly.

The user can select a particular Job then, click on the sub product and or operations tabs to view details regarding the job schedule. All reports in Resource Manager use the scheduled data.

**Action Step:** Click on [Close] button to return to main menu.

## Rescheduling Notes

Rescheduling mostly refers to the fact that something has happened (feedback for actual dates, times, quantities, etc.) and the user would like to auto-adjust the master schedule. Thus, rescheduling is done in forward order. If a job was initially scheduled as reversed then it is, in effect, “turned around” during rescheduling.

ResourceManager will use whatever data has been provided in order to reschedule going forward.

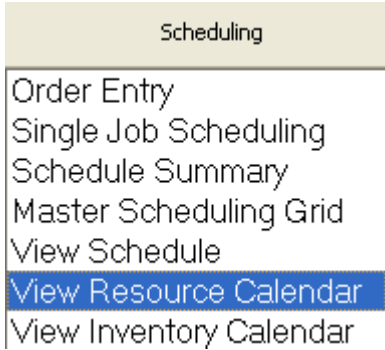
For example, if you have logged an actual START and/or END DATE for any Workcenter or Product, then ResourceManager will use the latest update, in sequence, in order to drive new schedule dates for REMAINING operations. If no actual dates have been logged, then Resource Manager-DB will use the initial START DATE for rescheduling. The user can change this date on-the-fly to further control the rescheduling options.

The user can still “reschedule” using Reverse Scheduling by removing currently scheduled Job and scheduling again.

## 10. View Resource Calendar

**Action Step:** Click on [View Resource Calendar][Do It].

The Resource Calendar provides a dynamic view of all Workcenter hours, summarized by day, required for active schedule. In addition, the Resource Calendar allows for individual Workcenter calendar edits, graphing, quick view reports, and other valuable load analysis reports.



Red format means fully loaded. Blue is for off days. Pink is for over capacity (over capacity is achieved when jobs are scheduled with full capacity option enabled.)

**Action Step:** Double Click on day with hours loaded to view Quick Report listing all Jobs scheduled for that Workcenter, for that day, along with hours and pieces.

**Action Step:** Click the arrow keys to scroll one week forward or back at a time. Check out the other tabs.

*These live calendars provide maximum flexibility for running your operations. For Example:*

**Total Capacity Tab:** Change available capacity, for any workcenter, for any dates.

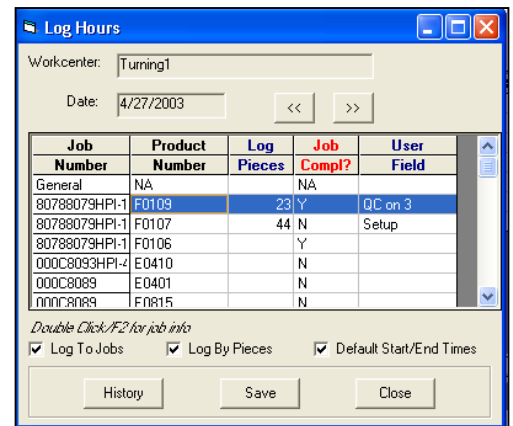
**Available Capacity:** Quick view of Total Capacity minus Hours Assigned.

**Backlog:** Sum of all hours loaded from this date forward.

**Utilization:** Hours Assigned divided by Total Capacity

**Logging:** Direct feedback for tracking, rescheduling, costing, etc. Post production (pieces and hours) directly..

Press [Close] to return to main menu.



Resource Calendar

Utilization: Hours Assigned | Backlog: Total Capacity | Logging: Available Capacity

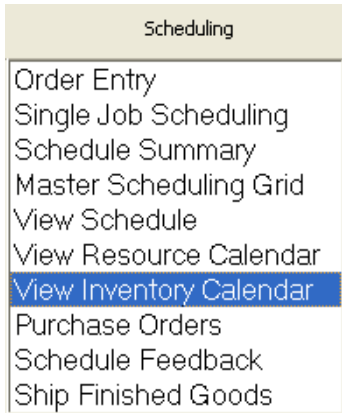
Find: [ ] << 4 /27/2003 >>

	04/27/03	04/28/03	04/29/03	04/30/03	05/01/03	05/02/03	05/03/03
2nd Op	0	8	8	8	8	8	0
Assembly	0	8	8	8	5.156	0	0
Inspection2	0	0	0	0	0	0	0
Saw	0	8	0	8	0	0	0
Turning1	0	8	0	8	0	0	0
Turning2	0	8	8	8	8	8	0
Turning3	0	7.54046	1.75554	8.18333	4.46467	0	0

Earliest Date in Calendar: 1/1/2001 Latest Date in Calendar: 7/19/2045

Run... Purge Reset Defaults Export View Graphing Close

## 11. View Inventory Calendar



**Action Step:** Click on [View Inventory Calendar][Do It].

Resource Manager-DB's inventory system is designed to meet YOUR best practices. That could be for running with the LEAST amount of maintenance, or with detailed manual transactions.

For example, once you define safety stocks, lot sizes, beginning inventory, and locations, the system will generate the required orders to fill demand. Resource Manager-DB DOES NOT require you to 'receive' those orders to complete production – unless that is what you want!

There are four tabs on the Inventory Calendar:

- 1. Forecast Total Inventory:** The sum of Forecast Available to Promise and Logged Inventory. Double click to see breakdown .
- 2. Forecast Available to Promise Inventory:** This is the amount of "free" inventory that can be assigned to new jobs. It is incremented or decremented automatically during scheduling and issues (see Issue Button). Double Click, or F2, on a cell to change the quantity of available inventory. Available inventory can also be adjusted from Location\Transaction Button plus Product Master and through Data Import.
- 3. Logged Inventory:** The totals are incremented when the user receives raw materials from purchase orders, or logs the actual completion of finished goods. The totals are decremented when finished goods are shipped, or raw materials are consumed.
- 4. Transaction History:** Shows the sum of all inventory activity for a given date. Double click or F2 to view details.

**Action Step:** Click on all tabs. Double click on example quantities on each tab.

Check out Reports and Locations Button.

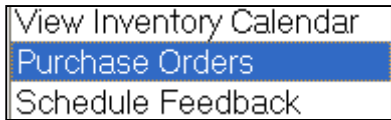
[Close] button to return to main menu.

The screenshot shows the 'Inventory Calendar' application window. It has three tabs: 'Transaction History', 'Forecast Total Inventory', and 'Logged Inventory'. The 'Forecast Total Inventory' tab is active, showing a table with columns for dates from 07/06/03 to 07/12/03 and rows for various items. A pop-up dialog box titled 'Resource Manager-DB' is overlaid on the table, displaying an 'Inventory Breakdown' with the following values: Available: 50000, Logged: 0, and Forecast Extra: 3709. Below the dialog box, the text 'Forecast Total Inv = Forecast Available to Promise plus Logged Inventory' is visible. At the bottom of the window, there are fields for 'Earliest Date in Calendar' (4/20/2003) and 'Latest Date in Calendar' (8/22/2003), and a row of buttons: Run..., Purge, Reset, Locations, Reports, View, Graphing, and Close.

	07/06/03	07/07/03	07/08/03	07/09/03	07/10/03	07/11/03	07/12/03
1USPEN	25	25	25	25	25	25	25
234Spring	50000	50000	50000	50000	50000	50000	50000
Ink_1000	125	125	125	125	125	125	125
Lower_Barrel	55	55	55	55	55	55	55
Ring_101	345				345	345	345
Upper_Barrel	0				0	0	0

## 12. Purchase Orders/RFQs

Resource Manager-DB excels with its integrated purchasing and receiving module. First menu allows instant access to run, view, edit, or purge POs.

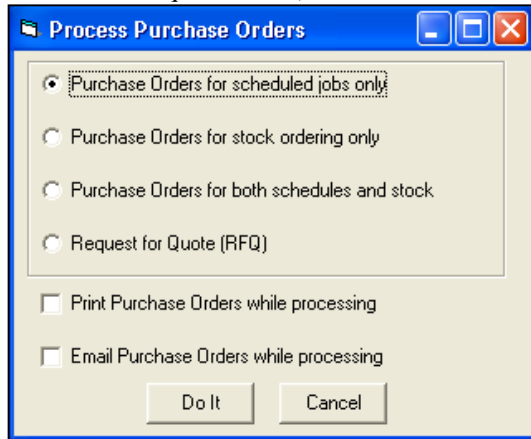


With a single click, the user can generate purchase orders or RFQs per Lean Manufacturing (Kanban-Visual-On Demand) and/or standard schedule requirements (Job & MRP Based).

Automatically e-mail RFQs and POs to vendors.

The preview grid allows for real-time editing: review Product and Vendor information, change quantities, prices and Vendors on demand.

The system tracks each received quantity, open or closed status, and adjusts inventory - simply and automatically.



Product ID	Vendor ID	Qty To Order	Unit Cost	Job Number	On Order	Start Date	End Date
234Spring	Central Spring	6	\$0.05	005_4302	0	4/14/2003	4/17/2003
234Spring	Central Spring	234	\$0.05	004_4302	0	4/14/2003	4/17/2003

## 13. Schedule Feedback

Resource Manager-DB allows maximum flexibility for Schedule Feedback and Re-Scheduling capabilities. For example, the user can elect to:

Perform NO feedback at all. The schedule has been generated, reports available, and no other inputs (besides the scheduling of BORs) is required to have a *Planned Schedule* system up and running. This is how we recommend the user begin with the system. Then, after we understand in what parts of schedule feedback, other adjustments, and rescheduling would work best for you, these parts can be implemented with great success.

Feedback any one or more of: quantities, start time and date, finish time and date, actual hours, employee data, and more.

Report on actual feedback, compared to planned schedule, without rescheduling.

Several options for logging actuals: by Workcenter, by Job, by Product, etc.

When logging actuals to Operations, user can choose standard cycle times (as set in BOR), average cycle times (calculated in-process, for current Job), or user entered values for rescheduling the remaining pieces as close to reality as possible.

**GREAT FEATURE!** In addition, the user can reconfigure the scheduled BOR, changing routings to reflect dynamic changes, adding-deleting and substitutions, etc.

Import in WIP or other actuals from most any system (including a simple Excel sheet – see Routing Report).

### Other Adjustments

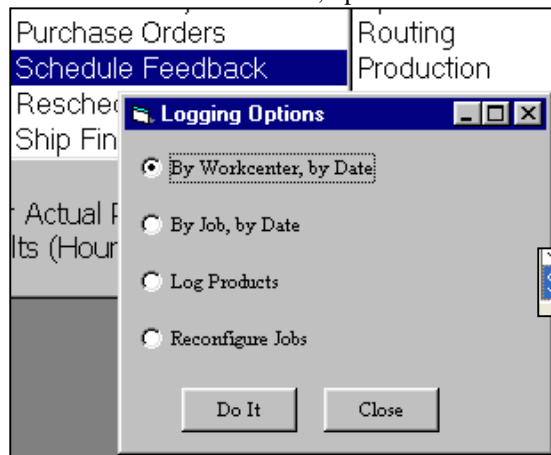
In addition to the Job specific schedule feedback option, the user can adjust any one or more of the following parameters, before Rescheduling.

- Daily Chart to change hours available across all workcenters.
- Resource Calendar to adjust hours for specific workcenters for specified dates.
- Number of resources (people and/or machines) are available.
- Inventory adjustments and corrections.
- Purging schedule of some Jobs (which then can be edited in sales orders).

**GREAT FEATURE!** Many of these options are inclusive on the Master Scheduling Grid for a single screen, cruise control, operation of the entire schedule.

### Ship Finished Goods

This section helps automate the final processing and final reports (Packing lists, simple invoices, etc.).

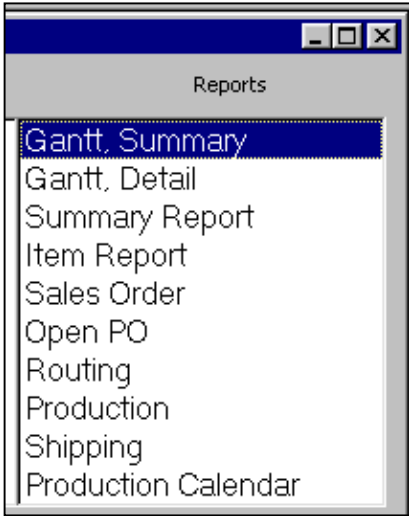


## 14. Reports

**Great Feature! Resource Manager-DB features MS Excel as its report writer. There is no better environment for quick and powerful customized reports than what is possible in Excel.**

There are three key areas available for reports, as follows:

1. The BOR, Sales Order, Purchase Order, Production, Summary and Routing printing allows maximum flexibility in defining various standard and custom fields and custom formulas for output to Excel.
2. Within the Data Export Function, the user can define unlimited custom reports using select database fields from throughout Resource Manager-DB.



3. Thirdly, Resource Manager-DB contains a host of very powerful, pre-defined reports that are available from Main Menu.

**Gantt Summary:** A great top-level view of all activity. Instantly check the status and flags for all jobs in schedule.

**Gantt Detail:** Drill down detail for Workcenters, Products, or both.

**Summary Report:** Totals quantities or costs for schedule, by product/operation by time bucket. An instant top-level MRP report for all Products, the Summary Report will tell you what you need to buy or make, how much, and when – all consolidated on a single sheet. View over any time horizon – by day, week or month.

**Item Report:** Summarizes all requirements per part number. Ideal for Workcenter loading, it lists each job, when to start, when complete, and how much is required. Reports on both Products and Operations.

**Sales Order:** Prints Sales Order with schedule data.

**Open PO:** Open Purchase Order Report.

**Routing Report:** The routing report recreates the original BOR with Operations steps from first to last. Complete details for all Workcenters, which jobs to work on, in which order, how many pieces, etc. Also, daily view & auto print.

**Production Report:** Displays all of the information pertaining to a specific job. Perfect for job costing. The Production Report automatically reconciles inventory and capacity for a job and lists the sequence of operations and products to fulfill order on time. Also reports on all actual data, to date, and variance calculations.

**Shipping:** Reports on Finished Goods shipped.

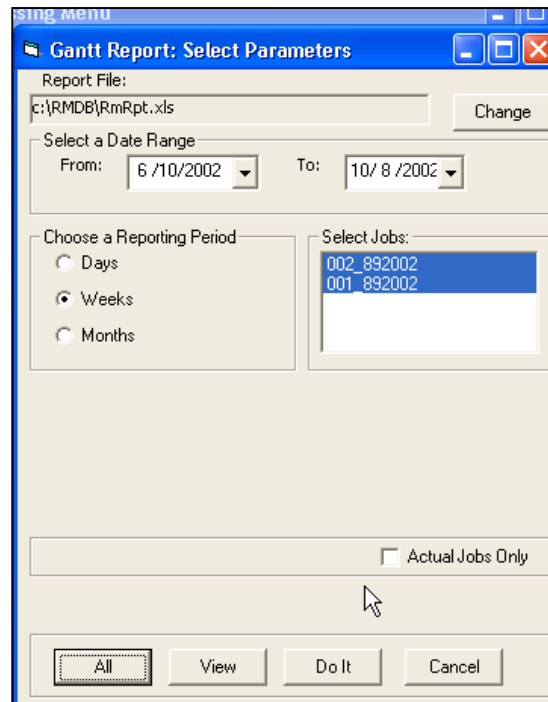
**Production Calendar:** Special, live version of Summary Report with custom sorting\grouping options.

To run any of these reports, simply select the desired report from the menu – Do It.

**Action Step: Press [Gantt Summary][Do It]**

Each report has a similar form for defining the parameters for running the report.

**Action Step: Select or accept Reporting Period, one, or more, or [ALL] jobs, and [Do It] [OK].**



The user can run various reports (which are all saved to RMRPT.xls) and press View at any time to run Excel and open report.

**Action Step: Press [View].**

The Gantt chart in Excel (RMRPT.xls) highlights all Jobs, start time, stop time, scheduled operation by time bucket, and color legend for analysis of the following:

GANTT CHART FOR END PRODUCTS									
Clear		Detail - Go			FORMATTING:				
2		** Indicates the job has been Rescheduled	* Indicates additional Operations; double click for complete list		END		LATE		
Entries					- Color for (on-time) End Items		- Color for Late Jobs, not R		
					SUB		LATE		
					- Color for (on-time) Subcomponents		- Color for Late Jobs, Resc		
JOB NUMBER	PRODUCT NUMBER	PRODUCT NAME	QTY	Friday 10/12/2001	Saturday 10/13/2001	Sunday 10/14/2001	Monday 10/15/2001	Tuesday 10/16/2001	
002_10122001	1USPEN	1USPEN	25						Assembly
001_10122001	1USPEN	1USPEN	123						Assembly

**Green Color** (all ok) for when actual completion feedback dates, and/or system rescheduled dates (based on actual completion dates) all fall within the original scheduled dates.

**Pink Color** (job is late) for when actual completions feedback dates are later than original scheduled dates.

**Yellow Color** (Job may be late) for when rescheduled dates are later than original scheduled dates and no actual completion dates have been entered by customer.

The user can format the color legend cells to different colors if they wish. Actual completion dates are denoted by the border color overlaying the fill color. Users can also change column widths and other fonts as they wish.

A double asterisk in Job Number column indicates Job has been rescheduled.

A single asterisk included with Operations indicates more than one Operations is scheduled for work in that time bucket. The user can double click on cell to view additional scheduled operations.

**Action Step:** Click the [Close] button. Run other reports as desired.

## 15. Summary

Hopefully, you see good potential for Resource Manager-DB to help you with your planning and scheduling needs.

If you haven't already done so, we invite you to contact us to arrange for web-demo focused on your needs. You can even send samples of your existing data and we will use what we can as part of the web demo. Thus, the direct benefits and path to your success will be clear before you order product.

Since the product has a *30-day guarantee*, and we provide *free technical support*, it is a prudent decision to *order the complete product for a full-scale test using your actual data*.

**THANK YOU** for taking the time to review Resource Manager-DB. This product is the result of working with thousands of customers, like you, who need immediate help to plan and schedule resources but don't need another expensive headache. PLEASE CALL US if you have any questions or ideas. We are constantly adding custom features for clients and may be able to deliver exactly what you are looking for.

When you order the complete product, we will work with you to make sure you are successful within 30 days – guaranteed.

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*Thank you for the opportunity to serve.*