Workcenter SchedulerXL
QuickStart

1. GETTING STARTED

Thank you for your interest in Workcenter SchedulerXL (WCXL) the simple, yet powerful Workcenter scheduling system, that runs with ALL versions of Microsoft Excel!

These *QuickStart* instructions, along with the sample trial file, will enable you to quickly evaluate some of the key features of Workcenter SchedulerXL.

In about 30 minutes, you can start with a completely blank system and configure defaults and Workcenters then build, schedule, and report on a sample Job. Or, simply review the screens with pre-built data. to give you a basic overview of the system without having to enter and data.

At any point during your review, PLEASE CALL *US* IF YOU HAVE ANY QUESTIONS about how to configure and run Workcenter SchedulerXL for your needs. We are committed to your success and would love to hear from you.

System Requirements

Excel 2007 (please call US for earlier versions) installed and working on standalone PC or Network.

QuickStart Overview

There is a simple four step process for basic running of Workcenter SchedulerXL. The remainder of this *QuickStart* will give you a tour through each of these areas: Initialize, Build, Schedule, Report.

Initialize
↓
Build
↓
Schedule
↓
Report

Important

Don't use the Print Icon in Excel Toolbar. Use the WCXL Print Buttons or use File, Print, Selection (select area with mouse first).

Installation

Please note where you downloaded (saved) the WCXL??.xlsm file from demo download section on web site or from e-mail attachment for example, c:\mydocuments

Now start Excel and click on File, Open, c:\MyDocuments\ WCXL??.xlsm.

If you are prompted to enable macros, click **[enable macros].**

For Office 2010 and up, you may need enable the Developer Tab to adjust your Macro Security to Enable macros. Note, the Macros have been signed and registered.
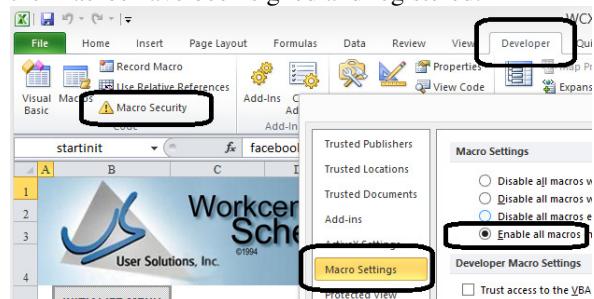
Up and Running

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

1. Follow (Print) this *QuickStart*. (View sample data screens and / or run the Clear Macro (Developer Tab, Macro, type in ClearAll click the RUN button) to start with blank system and enter your own data.)
2. Call *US* at (248) 486-1934 for a "walkthrough" based on your requirements.
3. Online help (call *US* for email of full help files).

[ACTION STEPS]: Throughout this *QuickStart*, there will be *Action Steps* that you will follow to enter data and run schedules and reports. The Action steps include actual WCXL commands in **[bold square brackets].**

QuickStart
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NAVIGATION

Workcenter SchedulerXL includes 15 integrated worksheets that are processed and/or accessed by one of two methods:

1. **Clicking on the Excel tab at bottom of screen – this will simple take you to that sheet and display data.**
2. **Selecting the light gray buttons to perform an action.**
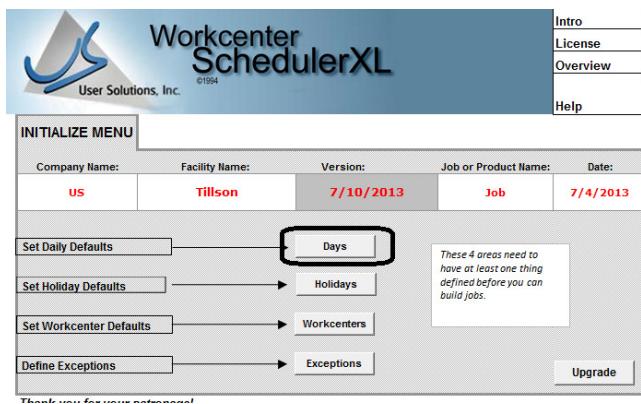
2. INITIALIZE MENU: DAILY DEFAULTS

For capacity planning and scheduling according to Workcenter hours, you need to tell the system what hours you normally work per day and a list of holidays when no work will be performed. Note that in the next section, we can adjust these general hours for specific Workcenters. For this example, we will assume the Workcenters are available Mon-Fri for 10 hours per day. If most days are the same, you can Copy General Defaults one time and click on any day (for example Friday below) to set specifics for any day.

Clear means no work performed. Ship is day available for shipping. If job is finished during non-ship day, it will roll forward to next ship day.

Action Step: Press [Days] button, [New], [Add New] and select the first of the current month, then click [OK].

Action Step: Under General Defaults, Enter X hours worked, then press the [Copy] button to copy General Defaults over to daily defaults.

Action Step: [Check] boxes in the "Ship "column for Mon-Fri, and [check] clear boxes for Sat-Sun. Check on a couple of actual days to verify. General Defaults (x hours, 10 in demo hours) were copied over.

Ship days are the days the Job can be actually shipped. Your completion date of a project, or Job, might not be the same as when you can actually deliver it.

The rest of the parameters are for fine tuning Workcenter SchedulerXL for your particular scheduling needs. Workcenter SchedulerXL also offers TEAM BASED WORKCENTERS and allows you to configure these teams based on your environment.

Note the Net Capacity field as you click on the specific days of the week. In our simple example, they are all 10 hours.

Action Step: Press [Save], then [Close] to save default set and return back to Initialize Menu.

Action Step(optional): Press [Holidays], then [Add New] to add Holidays or other days, such as Company Meetings with dates and names and [Save]to return to Initialize Menu.

3. INITIALIZE MENU: DEFINE WORKCENTERS

Before you can build and schedule Jobs, you must tell Work CenterXL how many hours a day you can work (which you did in the previous step) and what Workcenters are available.

Note that all these Workcenters have already been defined in sample data but you are free to add you own using same process.   You will need to *Press [Save] if you changed something.*

🏃*Action Step: Press [Workcenter] button and review sample data.*
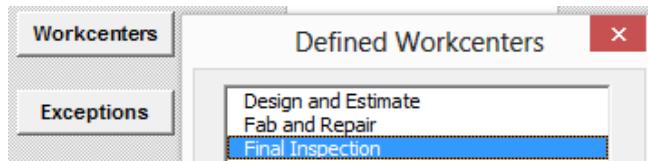
If starting from blank system, or you wish to add your own workcenters here are the steps that created the sample data:

🏃*Action Step: Press [Workcenter] button, [Add New], enter name: "Design and Estimate" [OK] as our first Workcenter.*
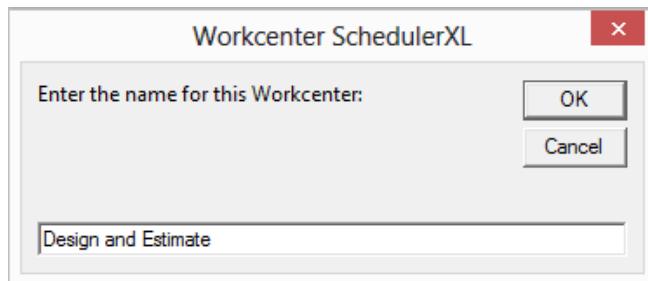
🏃*Action Step: Select [Yes] to default starting date for Workcenter defaults.*

🏃*Action Step: For the QuickStart, we will just have three Workcenters all working 10 hours per day, four days a week (as was defined in previous section unless you changed this).   Press [Save] if you changed or added something.*

🏃*Action Step: Press [Add New] button, enter name of Fab and Repair [OK] as our second Workcenter, Select [Yes] to default starting date for Workcenter defaults, [Save] [OK].*

🏃*Action Step: Press [Add New] button again, enter name of Final Inspection [Save] [OK] as our third Workcenter, Select [Yes] to default starting date for Workcenter defaults and then [SAVE], then [CLOSE].*

🏃*Action Step: [CLOSE] to return to Initialize Menu.*

You will be able to view and\or edit defined Workcenters. Then Press [Close] to return to Initialize Tab.

4: INITIALIZE MENU: DEFINE EXCEPTIONS

When a Job can't be started on time, or is delayed during processing, or ships late, you will be prompted for an exception – i.e., reason why late or delayed. There are various reports, including Pareto Charts, to assist management in identifying the reasons for schedule delays. To get started, we need to define a couple of standard exceptions.

Action Item: Press [Exceptions] button on Initialize Menu.

| Set Workcenter Defaults | ➔ | Workcenters |
| Define Exceptions | ➔ | Exceptions |
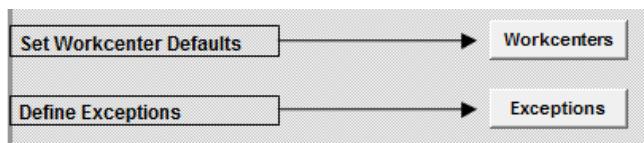
Action Item: Enter "Customer Approval," then press [Save] button, then [Close] button.

Exceptions ✕

Enter New Exceptions Below:

Customer Approval

(none)

Save

Close

Delete
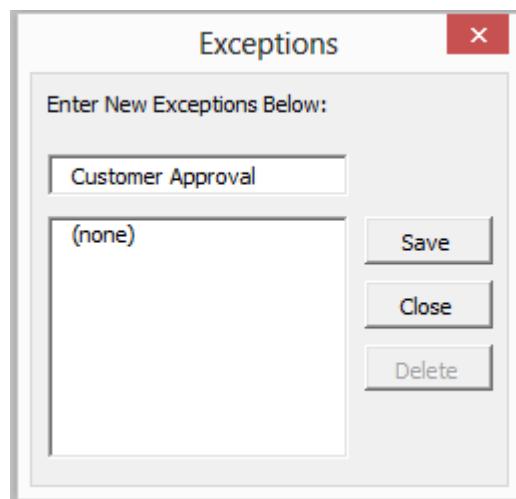
Congratulations! You have set up the initial data and are ready to build and schedule Jobs.

Action Step: Press the [Build] Tab to go to Build Menu.

5: BUILD MENU: BUILDING JOBS

The Build Menu (Build Tab) is where you create, schedule, and maintain Jobs. After the Init Tab, all work is done here.

Note, as before there are several jobs already scheduled. The following steps are how they were defined and can be easily followed with your own custom data.

Action Step: Creating a new Job: Find similar and copy over and edit name, hours, etc.
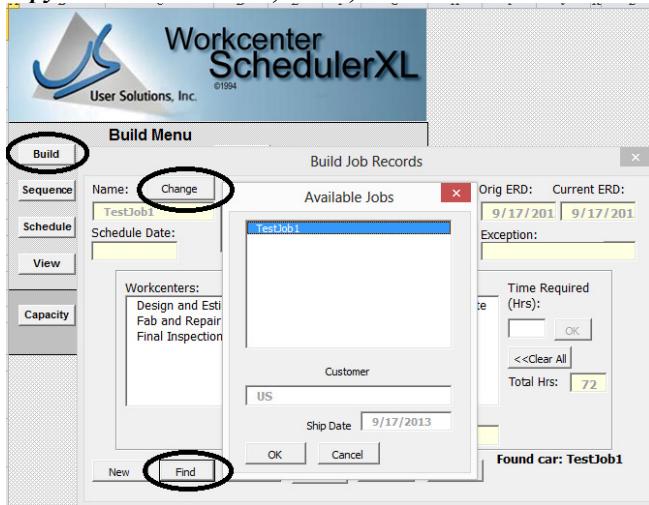
Creating a new Job from scratch:

Action Step: Press the [Build] button, then [New], then enter "TestJob5" [OK] as the Job ID.
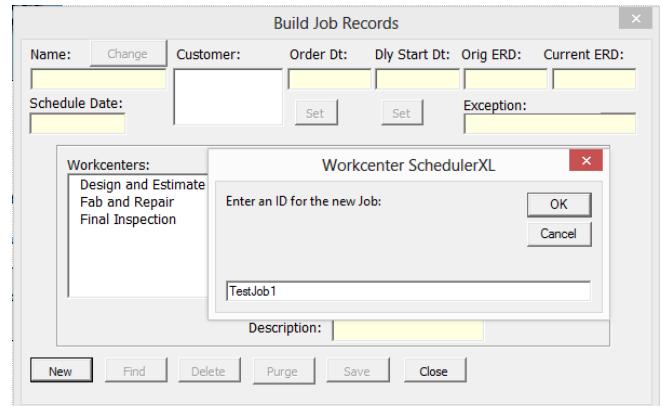
Action Step: Enter Sample as customer name, then [Set] Order Dt: to today's date (NOT the date shown in screen below).
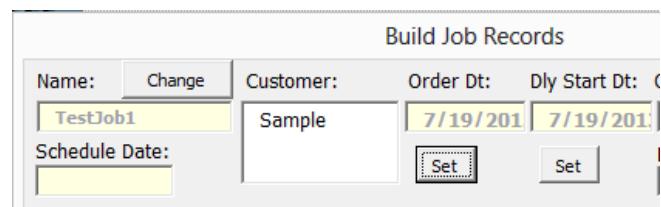
Note: Workcenter SchedulerXL will be attempting to forward schedule from the order date if, the first Workcenter is available. If not available, Workcenter SchedulerXL will automatically keep pushing forward until it finds a day where first Workcenter can begin Job. Should you choose to set a Dly Start Date (Delay Start Date) in the future, you will be asked for exception if beyond three days from order date.

Creating a new Job - Step 2 Routing

Action Item: To create the sequence of operations, simply start with the first Workcenter – Design and Estimate and press [Add] button.

Action Item: enter 22 hours and description, and [OK].
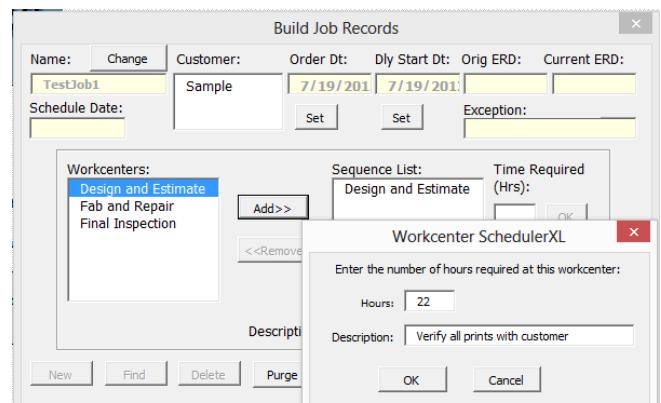
🏃*Action Item: Repeat process by selecting next Workcenter, FAB & REPAIR, and [ADD]. Enter 36 hours, and description, and [OK].*

🏃*Action Item: Select last Workcenter, FINAL INSPECTION [ADD], enter 14 hours, description, and [OK].*
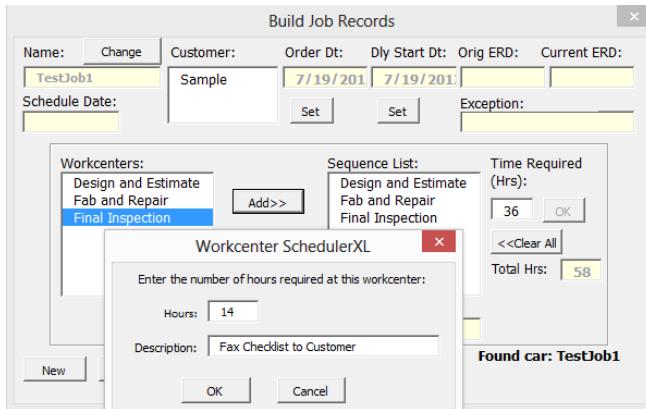
Excellent! You can check your work by clicking on each Workcenter – note the total hours = 72.
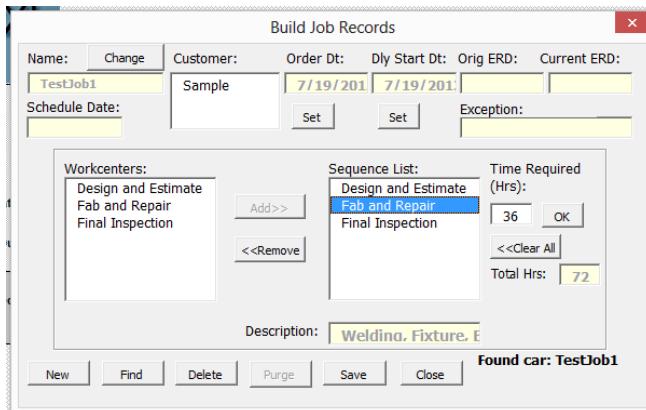
🏃*Action Item: Press [Save] [OK], and then [Close].*

🏃*Action Item: Note on using your own data: If you choose to use your own data, we recommend you use the Macro ClearAll to clear out all data in system and start from scratch.*

6: SEQUENCING & SCHEDULING

Well Done! We have now covered the key parts of initialization and creating a Job and are ready to deliver the core benefits – scheduling and reporting. The first step is to sequence the Jobs. The sequence order determines how the available capacity is allocated.

🏃 **Action Item: Click on the Build Tab at the bottom of the spreadsheet to access the Build Menu. Press the [Sequence] button.**

🏃 **Action Item: Select desired Jobs to schedule and press [Add], then [Save].**

Note: When you have multiple Jobs to schedule or reschedule, this determines the sequence or priority of how the Jobs will be scheduled. You can drag and relist the order of desired processing at any time.
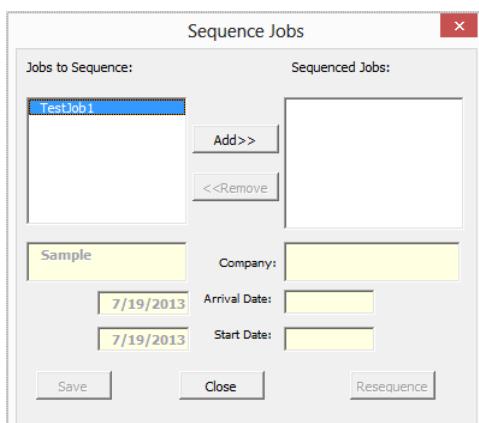
🏃 *Action Item: Press [Schedule] to schedule TestJob1.*

🏃 *Action Item: Your choice of auto printing of routing sheet [Yes] or [No].*

This report provides a quick promise date for completion, as well as all the details for routing.
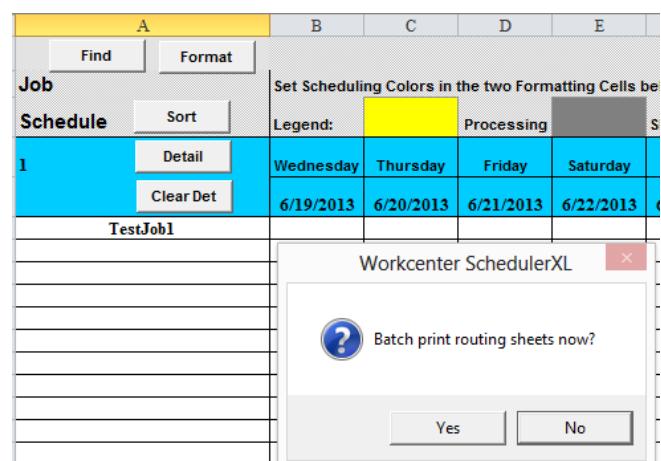
🏃 *Action Item: Press [OK] when scheduling is complete.*

Congratulations again! You have successfully created and scheduled a Job. The remainder of this QuickStart will run through some of the excellent reports that are standard with Workcenter SchedulerXL. Then, you can enter a few more Jobs and keep scheduling and reporting and seeing how easy it is to automate some of our tedious scheduling processes.

If you like what you have seen so far, we recommend that you order the complete product to perform a real evaluation with your data. Since there is a 30 day money back guarantee and free technical support, you have nothing to lose and much to gain by ordering the product today.

7. MASTER SCHEDULE & RESOURCE CALENDAR

The Schedule tab shows all Jobs, when they start, and when they have finished in a Gantt style format. You can split \ freeze the window to scroll entire schedule.

🏃 *Action Item: Click on [Detail], [Yes], [OK], to explode entire schedule for the daily details.*

	A	AF	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR
1	Find Format													
2	Job													
3	Schedule Sort	Legend:		Processing		Ship Date							Legend:	
4	1 Detail	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday
5	Clear Det	7/19/2013	7/20/2013	7/21/2013	7/22/2013	7/23/2013	7/24/2013	7/25/2013	7/26/2013	7/27/2013	7/28/2013	7/29/2013	7/30/2013	7/31/2013
6	TestJob1	Design and Estimate - 10				Design and Estimate - 10	Design and Estimate - 2	Fab and Repair - 10	Fab and Repair - 10	Fab and Repair - 10			Fab and Repair - 6	Final Inspection - 10	Final Inspection - 4

Now, imagine all your Jobs, completely managed on this one easy-to-read screen. For more detailed tracking and rescheduling, you can call up any Job, establish when complete at any Workcenter, and reschedule remaining operations.

When rescheduling, you can choose any number of Jobs to reschedule and change the priority. These features enable anyone to easily build and maintain a finite capacity schedule.

🏃 *Action Item: Click on the Resources Tab to view the Resource Calendar.*

	A	B	AG	AH	AI	AJ	AK	AL	AM	AN	AO	AP	AQ	AR	AS
1		Resource Calendar Reset	Maxed-Out, No OT		Overtime in use		Maxed-out, with OT	Legend:		Maxed-Out, No OT		Overtime in use		Maxed-out, with OT	Legend:
2		3 Find	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday
3		Workcenters Format	07/19/13	07/20/13	07/21/13	07/22/13	07/23/13	07/24/13	07/25/13	07/26/13	07/27/13	07/28/13	07/29/13	07/30/13	07/31/13
4	1	Design and Estimate	10			10	2									
5	2	Fab and Repair						10	10	10			6		
6	3	Final Inspection													10	4

The Resources Calendar (Resources Tab) provides a dynamic view of all Workcenter hours, summarized by day, required for active schedule and is colored coded to view standard loading and overtime loading.

Cells in the Resource Calendar which are "full" (no more processing can be added for that resource on that day) will be formatted user selected colors. This makes it very easy to visually spot bottlenecks.

Next, we will review some of the standard reports.

8. REPORTING

Note: All reports are run and printed from the report tabs at the bottom of the spreadsheet. To run or print a report, click on the tab for the report you want to view. Then use the gray "run" and "print" buttons on that report's screen.
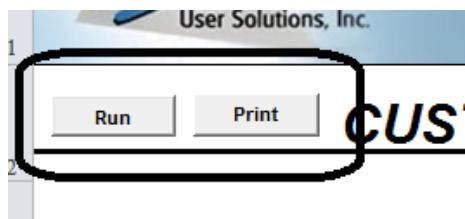
Action Item: Select Routing Tab and press [Run Button] [Single Job], select [TestJob1], [OK], [OK].

This single sheet contains an easy-to-follow routing for any Job. Note the scheduled "in" and "out" dates, along with actual completion dates, and any problems recorded. Also, note the Estimated Release Date, or finish date, for the Job.

Job Name: TestJob1

Sample   PRINTED : 7/19/2013

Workcenter	Hrs	In Date	Out Date	Compl Dt	Sign off	Description
Design and Estimate	22	19/07/13	23/07/13			Verify all prints with customer
Fab and Repair	36	24/07/13	29/07/13			Welding, Fixture, Brake
Final Inspection	14	30/07/13	31/07/13			Fax Checklist to Customer

WIP Report

This report, with a default of today's date, generates a listing of all Jobs at Workcenter, date in, hours remaining, date out, and previous Workcenter. Any "delayed" Jobs will be displayed as such.

🏃 *Action Item: Select WIP Tab and press [Report Button] [Pick a day to run], [OK].*

Workcenter Report

This report will allow the user to report on all Jobs present in the schedule that pass through a user-selected Workcenter at some point in their processing. Past Jobs will be included if they are not shipped or obsolete.

🏃 *Action Items: Select other Report Tabs and [Run] at will to review some fantastic reports – all in Excel and easy to print and track to! Here are some more suggested reports to run:*

Projected ERD (Estimated Release Date or Completion Date) Report

This report shows the estimated ship date for all Jobs which have not yet shipped.

Workcenter Throughput Report

This report shows the number of Jobs which pass through each Workcenter each day.

Workcenter Load Report

This report calculates Team Utilization (calculated as a percentage of Teams Utilized vs. Teams available) and Days in Backlog for each Workcenter, by day, for as far into the future as information exists.

Exceptions Report

This report compiles a list of exceptions, the time delayed of each, and the total number of occurrences and average time delay for each exception type.

Backlog Report

This report shows the number of active Jobs which exist in the system, by day.

Shipping Report

This report shows performance data on Jobs which have been shipped.

THANK YOU for taking the time to review Workcenter SchedulerXL. This product is the result of working with thousands of customers, like yourself, who need immediate help to plan and schedule resources but don't need another expensive headache to set up and maintain. PLEASE CALL *US* if you have any questions!

🏃 *Action Item: Download full product today risk free! 30 day money back guarantee!*

Call US to order (800)-321-USER (8737) or order direct from website: http://www.usersolutions.com/

PS: Not sure if Workcenter SchedulerXL will meet all your needs? We offer 110% trade-in on all other products. While WCXL offers forward scheduling of Workcenters, in a linear fashion, with one Workcenter per day, our next solution up, Resource Manager for Excel includes Products and much more flexibility for routing (parallel, etc). Both of these Excel add-ons are for single user maintaining edit control over same name file at a time (just like sharing a Word Doc).

Our Flagship offering, Resource Manager-DB offers the most in multi-user, automatic integration with other systems, advanced planning and scheduling features, and options to adapt system to meet your exact needs. No more, no less. When you combine the .NET Visual Scheduler and Cloud Based SweetRP, it's clear that User Solutions will have the right fit for your challenges.

Call *US* today to discuss which solution will provide you with the most benefits!