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Exact Globe Next | Visual Scheduler

User Guide





Exact Globe Next Visual Scheduler

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Welcome to Exact Globe Next!

This manual provides the information you need to work effectively with Exact Globe Next. It is part of the series of user manuals for Exact Globe Next. The goal of this documentation is to help you to get quickly acquainted with the product and the possibilities it offers. It will help all users, especially those without much experience with our software, to get started with and benefit from the product straightaway.

Exact Globe Next is an integrated software solution; its modules of related business processes function together in an integrated manner. Besides the user manuals, there are several information sources, related to the software, available to you. You can access online help documents on Exact Globe Next functionalities while working with the software by just pressing the F1 key. The list of help document also contains release notes related to the product. They inform you of the improvements and functional additions in the various releases of the product.

You can also access the help documents, release notes, and other related documents online through the Exact Customer Portal on www.exact.com. The Customer Portal is a protected part of the Exact Software internet site, which has been specially developed to provide you with information and to help you get the maximum yield from your software. This portal informs you about our contacts, downloads, FAQs, and the latest product news. We invite you to use the portal as often as you wish!

Thank you for using Exact Globe Next and this user manual!

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Chapter 1

Introduction



1. Introduction

1.1 Key Points for Scheduling

There are specific preferences and master files that must be set up prior to using **Exact Visual scheduler**. The following is a list of those items.

Visual scheduler is a tool in Exact Globe Next (part of **SE4010 – E-Special order**) used to view the overall picture of the shop floor schedule, view and manipulate the load from each production order operation scheduled to run through each operation, and view and manipulate the schedule of a production order.

- All active or new production orders can be globally scheduled or a single production order can be scheduled using **Visual scheduler**.
- Production order operations can be moved into another timeframe or another operation and their scheduling variables can be changed.
- The capacity for operations can be overridden for a specified period of time and what-if scheduling can be performed.
- Key indicators about the shop's schedule can be reviewed to alert the scheduler to bottlenecks, late production orders, and production orders that haven't started when they were scheduled to.

1.2 Preparing to Schedule

Prior to scheduling production orders, the following steps must be completed to ensure an accurate schedule:

1. Enable working with operations by selecting the **Operations** check box under the **Operations** section in **Manufacturing settings**.
2. Define shifts in Manufacturing → Setup → Shifts.
3. Set up operation capacity in the **Capacity/Scheduling** tab in operation maintenance (Manufacturing → Setup → Operations).
4. Ensure production orders are set up for scheduling. Production orders must have accurate run estimates in order to properly schedule.

1.3 Finite Scheduling versus Infinite Scheduling

Visual scheduler is an infinite scheduling tool by default. Infinite scheduling means that your production orders will be scheduled to the promise date without regard to capacity of the operation. Finite scheduling is an option with **Visual scheduler**. Finite scheduling means that your production orders will be scheduled based on the capacity of the operation using the Scheduling Pecking Order (also called Production Finite Scheduling Sequence) that will be set in the **Visual scheduler** preferences. The Scheduling Pecking Order will be the sequence that production orders are scheduled when global scheduling a Finite operation. Your pecking order choices are to schedule based on earliest due date, fewest remaining hours, or promise date. Using the **Visual scheduler** preferences, you can decide what order the production orders in your shop will be scheduled in.

Tip: Only those operations that are bottlenecks in your shop should be set to Finite. This would include operations that have only one available resource. For example, if everything has to go through the Saw and you have only one machine or one operator, this operation should be set to Finite. Other operations with multiple resources (machines or people) can be managed using the Infinite scheduling option. For more information, see 2.2 *Defining capacity per operation*.

A woman with short blonde hair, wearing a light blue button-down shirt, is looking towards the camera while holding a white document. She is pointing at a section of the document with her right index finger. In the background, another person is partially visible, and a computer monitor is on the right. The scene appears to be a professional meeting or office setting.

Chapter 2

Setting Up Exact Visual Scheduler

2. Setting Up Exact Visual Scheduler

2.1 Creating and Deleting Shifts

You can create and delete shifts via Manufacturing → Setup → Shifts.

Working day	Shift day	Start time	End time
<input type="checkbox"/>	Sunday		
<input checked="" type="checkbox"/>	Monday	08:00	16:00
<input checked="" type="checkbox"/>	Tuesday	08:00	16:00
<input checked="" type="checkbox"/>	Wednesday	08:00	16:00
<input checked="" type="checkbox"/>	Thursday	08:00	16:00
<input checked="" type="checkbox"/>	Friday	08:00	16:00
<input type="checkbox"/>	Saturday		

Description	Start time	End time	Scheduling break
Lunch	12:00	12:30	<input checked="" type="checkbox"/>

To create shifts:

1. Go to Manufacturing → Setup → Shifts and click **New**.
2. In the **Shifts** screen, define the code at **Shift code**. This is mandatory.
3. Click **Save**.
4. Under the **Working day** section, select the work day(s) for the shift.
5. Define the start time and end time respectively for each day.
6. If required, you can create breaks for the shift by clicking **New** under the **Break** section. Define the description of the break, the start time, and end time.
7. Click **Save**.

To delete shifts:

1. Go to Manufacturing → Setup → Shifts.
2. Select the required shift.
3. Click **Delete**. A message requesting for confirmation to delete the shift will be displayed.
4. Click **Yes** to confirm the deletion.

- Notes:**
- A shift that is linked to an operation cannot be deleted. You will first need to remove the shift from the operation.
 - Scheduled breaks will be deducted from total capacity time.

2.2 Defining Capacity Per Operation

When **SE4010 – E-Special order** is in the license, the **Capacity/Scheduling** tab is displayed in the operation maintenance at Manufacturing → Setup → Operations.

Here, you can define the available capacity for each operation and create parent-child relationships for operations.

Scheduled resources

2

Restrictions

☒ Labor

☐ Machine

Finite schedule

☒

Scheduled resources

Define the maximum number of resources that can work simultaneously on this operation. Otherwise, define the maximum number of machines that can be worked with in this work center. The value defined will also be the default in the **Scheduled resources** column under the **Shift** section.

Restrictions

Select the option **Labor** or **Machine** to determine if the total quantity of hours in the operation are labor or machine hours.

Finite schedule

This check box determines if the capacity is finite or infinite.

- If the check box is selected: Finite capacity – Lead time is limited by available capacity of the operation. This option can be used for bottleneck operations. When load reaches 100% of capacity, all other operations that are scheduled before this time will be advanced to first available capacity.
- If the check box is cleared: Infinite capacity – Schedules the operation without taking into account the load and capacity of the operation.

Shift section

Shift				
	Select	Shift	Scheduled resources	Weekly capacity
1	<input checked="" type="checkbox"/>	DAY	2	75.00
2	<input type="checkbox"/>	EVENING		0.00
3	<input type="checkbox"/>	NIGHT		0.00

Select

Select the check box(es) for the shift(s) that you want to use for this operation.

Shift

The available shifts will be displayed in this column.

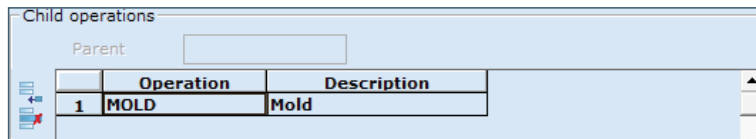
Scheduled resources

Define the maximum number of resources that can work simultaneously on this operation. Otherwise, define the maximum number of machines that can be worked with in this work center. When you select a shift, the value of **Scheduled resources** column will be used by default.

Weekly capacity

The calculated capacity will be displayed here. This column cannot be edited. The capacity is calculated as follows: Scheduled resources * sum of (working hours in the shift – scheduled breaks)

Child operations section



In this section, you can add child operations to an operation, creating a parent-child relationship. It should be taken into account that this relationship can only be one level deep.

2.3 Parent and Child Operations

Parent and child operations are helpful in cases where you have more than one of the same machines (in an operation) on the shop floor. When you create a production order that runs parts through one of those machines in the operation, you may not know which machine will actually end up running the production order. This is when parent and child operations can help you manage your shop more effectively.

Example:

You have three CNC Lathes on your shop floor.

In this case, you create three operations called CNC Lathe1, CNC Lathe2, and CNC Lathe3.

Then, you create an operation called CNC Lathe and add CNC Lathe1, CNC Lathe2, and CNC Lathe3 as its child operations.

When you create a production order that, in order to complete parts, must go through a CNC Lathe, you specify CNC Lathe on the production order.

While in **Visual scheduler**, after the production order has been scheduled on the parent operation, you can decide which child operation has the capacity to run the production order. It is as simple as clicking on the parent operation and dragging the production order to the correct child operation.

Note: If the parent is marked as Finite, **Visual scheduler** will automatically schedule on one of the children, based on the available capacity. If you do not want the scheduling engine to assign production orders to child operations automatically, do not select the **Finite** checkbox on the parent operation.

The child operations will always follow the parent operation's **Finite** setting. In other words, if the parent is marked as Finite, all the children will be as well. If the **Finite** setting is cleared for the parent, it will be for all children as well. In a child operation, the **Finite** setting will always be greyed out.

A man with glasses and a teal polo shirt is leaning over a woman with glasses and a red cardigan. They are both looking at a white document held by the woman. The background is a blurred office or meeting space.

Chapter 3

Scheduling Rules

3. Scheduling Rules

3.1 Finite Scheduling Rules

1. When using Parent / Child function, if the parent is Finite, all children will be.
2. Capacity of the Parent = Capacity of all of the Children
3. Load = total load of all children
4. If the operation is selected as a finite operation, the scheduling engine will not look at capacity of the parent; it will look at the AVAILABLE capacity of the children.
5. When finite scheduling on more than one resource, **Visual scheduler** will find the first slot available with both resources but may finish the production order on one resource if only one is available.
6. Finite scheduling also gives you an option in the **Move** function to allow overloading of a Finite operation.
7. If you choose to overload a Finite operation, the **Global scheduling** screen will be displayed with ALL production orders scheduled on the operation. You can then choose which production orders to clear and which production orders to schedule.

3.2 Scheduling Rules to Remember

1. **Visual scheduler** will NOT tell you what order to run your production orders in. There are too many variables to be considered for **Visual scheduler** to make assumptions. Your Shop Scheduler will ultimately be responsible for this decision.
2. When the Shop Scheduler tells **Visual scheduler** where to schedule a production order, **Visual scheduler** will NOT move or change that schedule.
3. Operation availability drives scheduling. If you do not have Operation scheduling variables and shifts defined, the operation has NO availability.
4. The scheduling engine will NOT overload a Finite operation.
5. Production orders are backward scheduled from the promised date minus any ship lead days.
6. Production orders without open deliveries are forward scheduled from the current date.
7. When Started operations are rescheduled, the end date may change, but the start will not.
8. Production orders are scheduled in the order they are displayed in **Global scheduling**. This order can be manipulated before clicking the **Schedule** button.
9. When the Shop Scheduler changes/moves a production order schedule the scheduling engine will NOT modify those changes unless the Shop Scheduler tells **Visual scheduler** to do so.
10. When adjusting the start time of an operation due to material availability, the operation start can be pushed out, but will NOT be pulled in.

3.3 Getting into Exact Visual Scheduler

The following forms and dialogs will be discussed on the next pages:

Shop overview – This provides an overview of the load of each operation and capacity in day, week, or month intervals.

Unscheduled production orders – This function is the same as **Global scheduling** except that it is available from **Visual scheduler** in the **Shop overview** and **Operation zoom in** forms.

Operation zoom in – This provides the ability to view each production order scheduled in each operation and move production order operations into other timeframes.

Production order zoom in – This function is the same as **Production order scheduling**, except that it is available from **Visual scheduler** in the **Shop overview** and **Operation zoom in** forms.

Exact Visual scheduler preferences dialog – This option is available from the settings menu and provides the ability to define the pecking order that production orders are scheduled when **Global scheduling**, the duration of the Firm Zone®, and the display settings for the **Shop overview** and **Operation zoom in** forms.

Operation display order dialog – This option is available from the settings menu and provides the ability to select the operations to be viewed in the **Shop overview** and **Operation zoom in** forms and define the order that they are listed.

Edit operation capacity dialog – This provides the ability to override the capacity of an operation for a specified date range.

Move history dialog – This provides the ability to view the history of production order operations that have been moved in the **Operation zoom in** form.

A man in a dark suit and a woman in a blue and white striped shirt are looking at a large screen in an office. The man is holding a pair of glasses and a piece of paper. The woman is holding a piece of paper and looking up at the screen. The background is a blurred office environment with other people and equipment.

Chapter 4

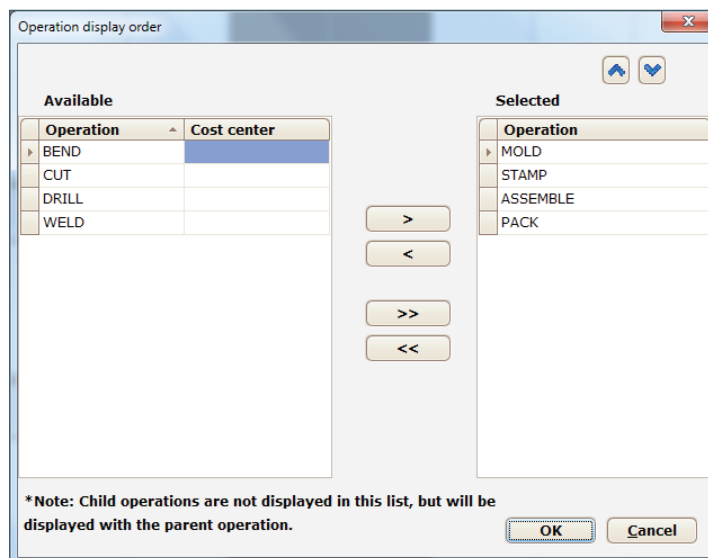
Exact Visual Scheduler Preferences

4. Exact Visual Scheduler Preferences

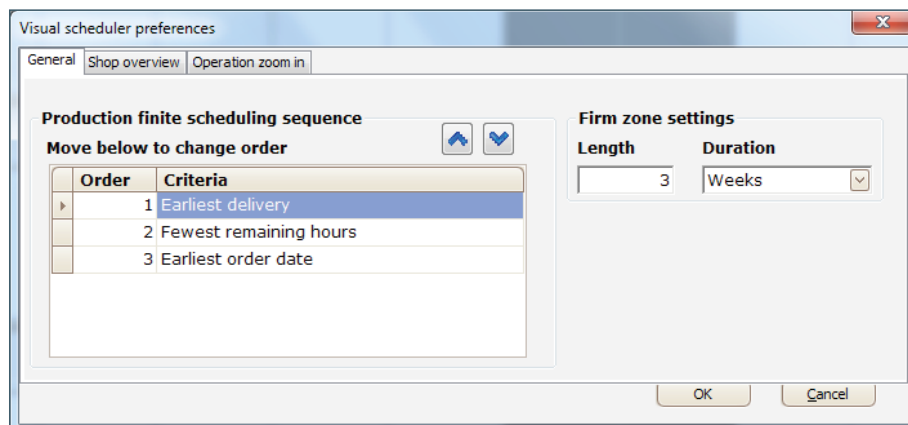
To open **Visual scheduler**, go to Manufacturing → Planning → Visual Scheduler.

To define preferences for Visual scheduler:

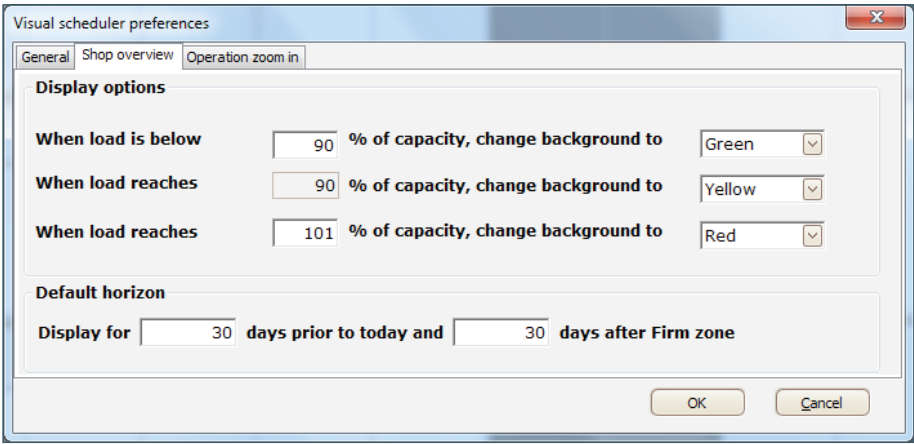
1. In the **Selection: Production order** screen, define the criteria to display only the production orders that you want to view in the scheduler.
2. Click **Start**.
3. Click **Settings**. Alternatively, click **Op. zoom** in at the toolbar, and then click **Settings**.
4. Click **Operation order** and define what operations will be listed in **Visual scheduler** as well as the order that you would to view them.



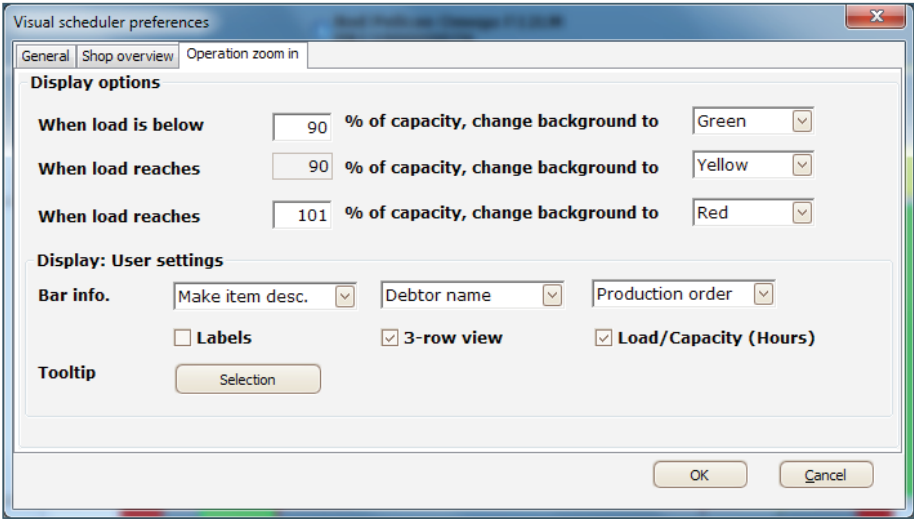
5. Click **OK**.
6. Next, click **Settings** and click **Preferences**. You will see the following screen:



- 7. If you have marked any operations as Finite, define your Scheduling Pecking Order under the **General** tab. This is labeled as the **Production finite scheduling sequence** in the preferences window.
- 8. Define your settings under the **Firm zone settings** section.
- 9. Click the **Shop overview** tab. The following screen will be displayed:



- 10. Select the color scheme that you would like to see when hitting specific thresholds and define your horizon in this tab as well.
- 11. Click the **Operation zoom in** tab. The following screen will be displayed:



- 12. Select the color scheme that you would like to see when hitting specific thresholds and make selections as to what information you would like to see displayed for each production order. Your choices are to the display production order number, part number, customer ID, and labels. You can choose to display all of this information for each production order if desired.



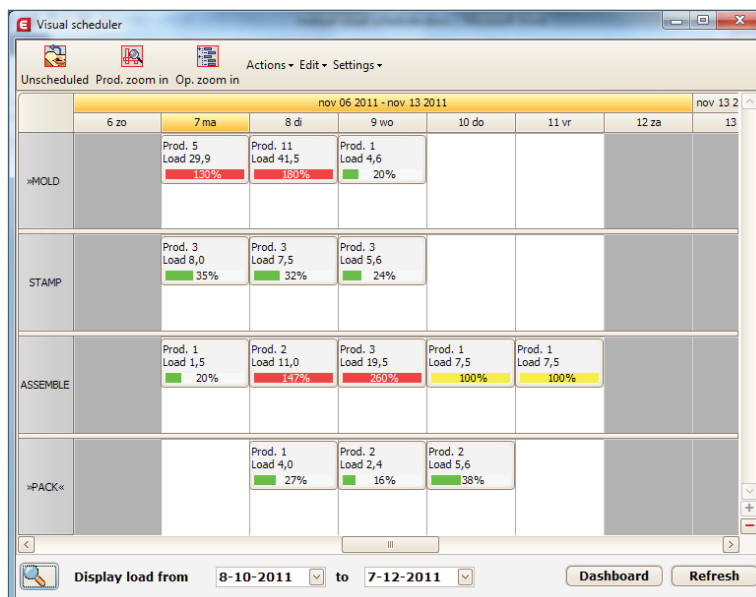
Chapter 5

Shop Overview

5. Shop Overview

Use the **Shop overview** form to view the big picture of shop load versus capacity. In this view you can:

- Review the number of production order operations scheduled to run through each operation.
- Review the total load hours from the production order operations scheduled in each operation.
- Review the percentage of the capacity of an operation that the load uses up for defined timeframe.



To review scheduled zones of an operation:

STAMP	Prod. 3 Load 8,0 35%	Prod. 3 Load 7,5 32%
ASSEMBLE	Prod. 1 Load 1,5 20%	Prod. 2 Load 11,0 147%
»PACK«		Prod. 1 Load 4,0 27%

Note: Finite Operations are flagged with >> << in the operation list.

Prod. – The number of production orders scheduled to run through the operation during the selected timeframe (day, week, or month).

Load – The total load hours in the operation during the selected timeframe (day, week, or month).

Load/Capacity Progress Meter – The percentage of the capacity of an operation being used by the load created from all production order operations scheduled to run through the operation during the selected timeframe (day, week, or month).

A scheduled zone tooltip will be displayed when you mouse over a work day. It will display the following:

Production orders – The number of production order operations scheduled in the operation during the selected timeframe (day, week, or month).

Cap – The capacity of the operation during the selected timeframe.

Load – The total load of the operation during the selected timeframe.

Late – The number of late production orders during the selected timeframe.

STAMP	Prod. 3 Load 8,0 35%	Prod. 3 Load 7,5 32%	Prod. Load
ASSEMBLE	Prod. 1 Load 1,5 20%	Prod. 2 Load 11,0 147%	Prod. Load
>PACK<		Prod. 1 Load 4,0 27%	Prod. Load

In general, there are two periods to deal with when scheduling. The first time period is a more finite time period where things are more firm and will not change as often. This will be your Firm zone. The second time period is the longer more fluid time period where requirements are expected to change.

A production order operation scheduled in the Firm zone is considered either pending or approved. A production order operation scheduled in the Firm zone is pending until it is either locked or approved.

Chapter 6

Operation Zoom In



6. Operation Zoom In

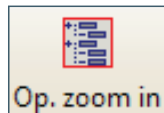
Use the **Operation zoom In** form to view and manage the production orders scheduled in each operation to:

- Define the **Visual Scheduler** preferences and operation display order
- Global schedule production orders
- Perform What-If Scheduling
- Move production order operations to another timeframe or operation
- Override operation capacity
- Review key production order operation details
- Change production order status

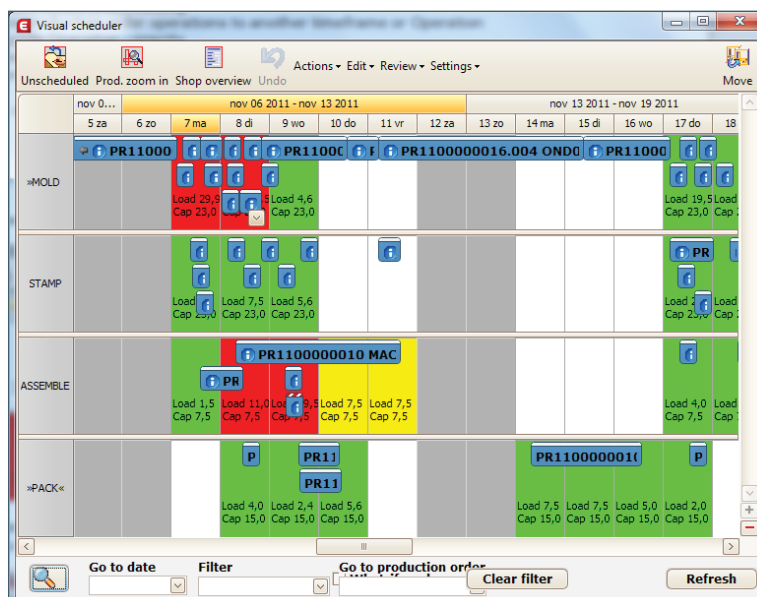
Note: All changes are automatically saved unless a user is in **What-if mode**.

To launch **Operation zoom in**:

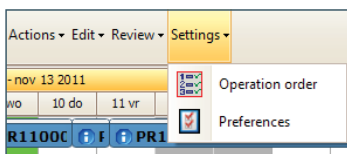
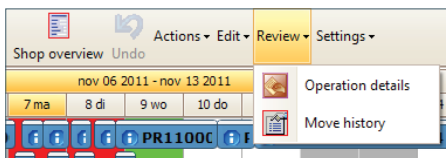
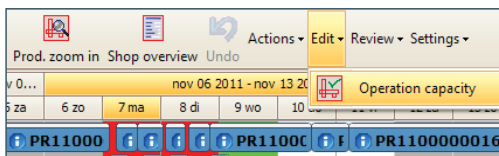
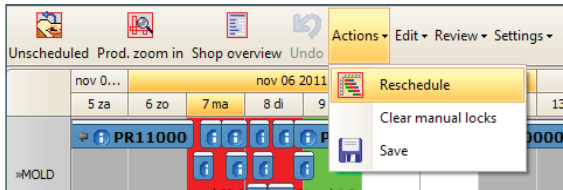
1. Go to Manufacturing → Planning → Visual scheduler
2. In the **Selection: Production order** screen, define the criteria to display only the production orders that you want to view in the scheduler.
3. Click **Start**. The following screen will be displayed:



4. Click **Op. zoom in** and the following screen will be displayed:

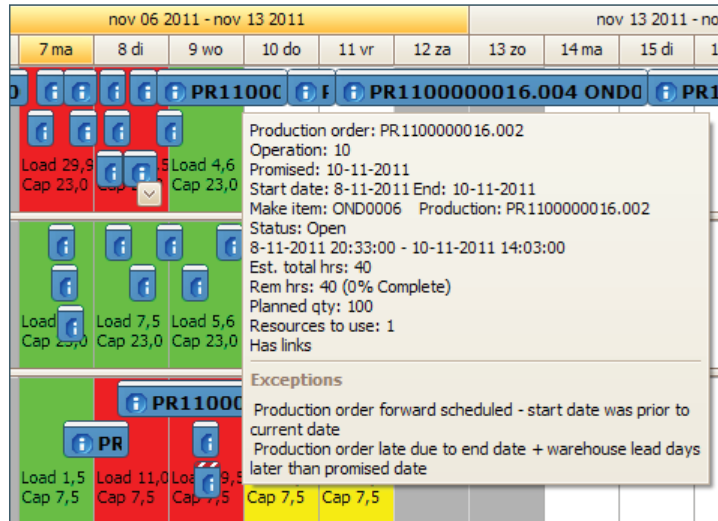


5. In the **Operation zoom in** function, the toolbar options at the top of the screen have changed. Each menu option is listed in the following:



What can I do in Operation Zoom In?

1. Set up the **Operation zoom in form** to the desired view.
2. Review the scheduled zone of a production order operation.
3. Mouse over the scheduled zone of a production order operation to view its tooltip information.
4. Review the details of a production order operation.
5. Zoom into a production order to view its production order operations, links, exceptions, and manipulate its schedule.
6. Perform What-If scheduling.
7. Right-click on a production order operation and select **Clear manual locks** if the production order operation is locked and you want to remove its locks.
8. Move a production order operation into another timeframe.
9. Move a production order operation into another operation.
10. Override the capacity of an operation.
11. Make the selected day a Work Day or Non-Work Day.
12. Right-click on a production order operation and select **Approve** to approve the production order operation in the Firm zone.
13. Click **Refresh**. The **Operation zoom in** form is refreshed to show the latest information in the system.
14. Select **Reschedule** from the **Actions** menu to reschedule the previously scheduled production orders accounting for the changes made while in **Operation zoom in**.



Tooltip – Anytime you mouse over a production order in its scheduled zone, the tooltip will be displayed with all of the pertinent scheduling information for that production order in the operation you have selected.

To view detailed information of an operation:

1. Double click on the production order in the scheduled zone. The following screen will be displayed:

The screenshot shows the 'Operation details' window. The window contains the following information:

- Prod./operation**
 - Prod.: PR1100000016.002
 - Make item: OND0006
 - Description: PRODUCTION: PR1100000016.002
- Operation**
 - MOLD
 - View another OP: MOLD
 - Debtor:
- General**
 - Hours**

	Setup	Run
Planned	0	40
Realized	0	0
Projected	0	40
 - Production quantities**

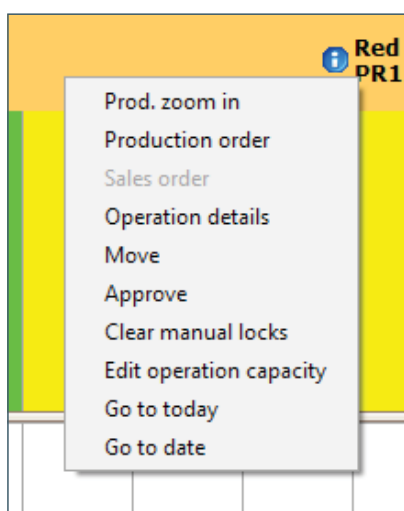
Planned	100
Realized	0
- Scheduling**
 - Start date: 8-11-2011 20:33
 - End date: 10-11-2011 14:03
 - Resources to use: 1
 - Status: Open
 - Actual start:

There are two tabs in the **Operation details** screen. The tabs allow you to:

- view general production order information, such as make quantity and actual total time by operation under the **General** tab.
- view materials linked to this operation as well as due dates of the materials under the **BOM** tab.

Note: The actual start date field can be manually defined or it will be populated with the start date of the first time entry against this operation. **Visual Scheduler** will now hold onto this date as well as the scheduled start and scheduled end dates so that you can compare these dates.

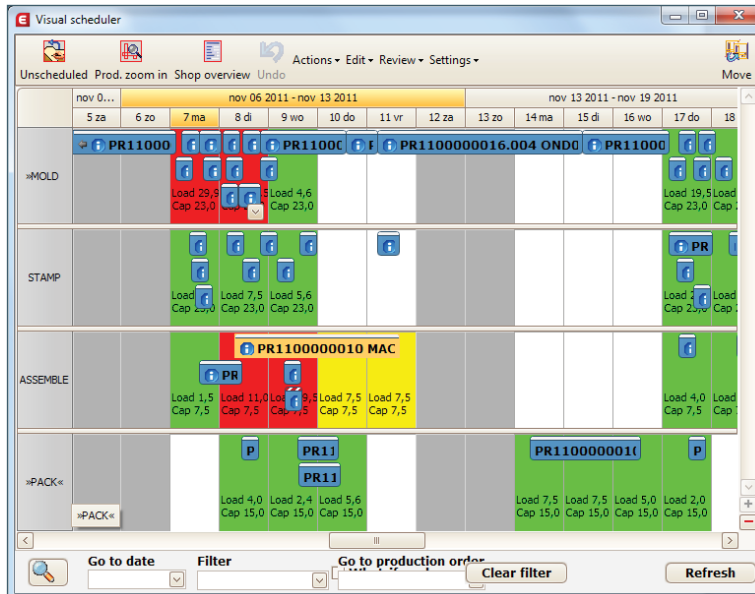
Use the right click option on your mouse to access menu options. Many of the options that you see in the right click menu are also available from the drop-down menus at the top of the screen.



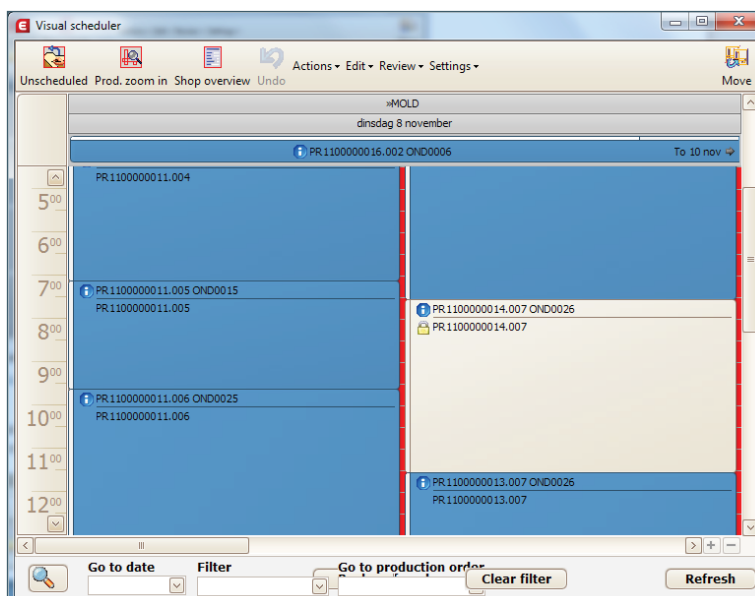
Note: Right click on a production order to display these options.

Use the right click option on your mouse to access menu options. Many of the options that you see in the right click menu are also available from the drop-down menus at the top of the screen.

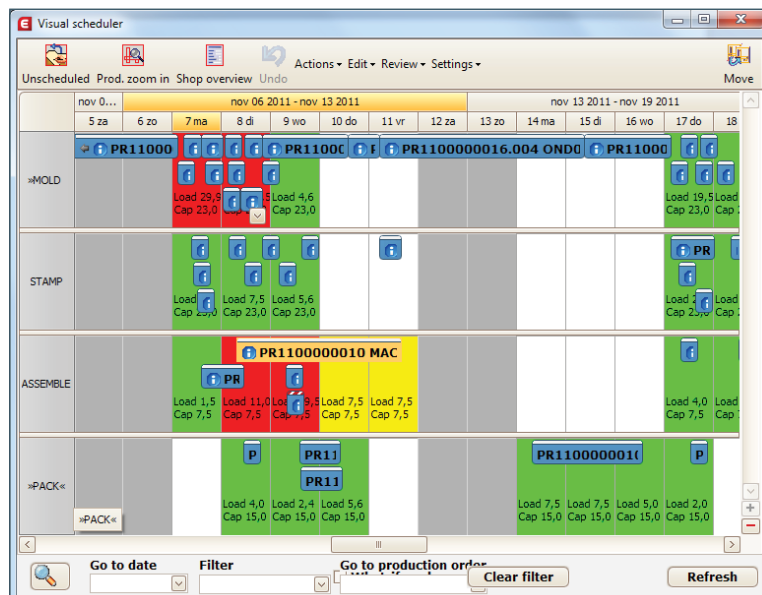
When you see a drop-down menu inside the scheduled zone of a production order, this means that there are more production orders in that scheduled zone. Click the drop-down menu to view the production orders.



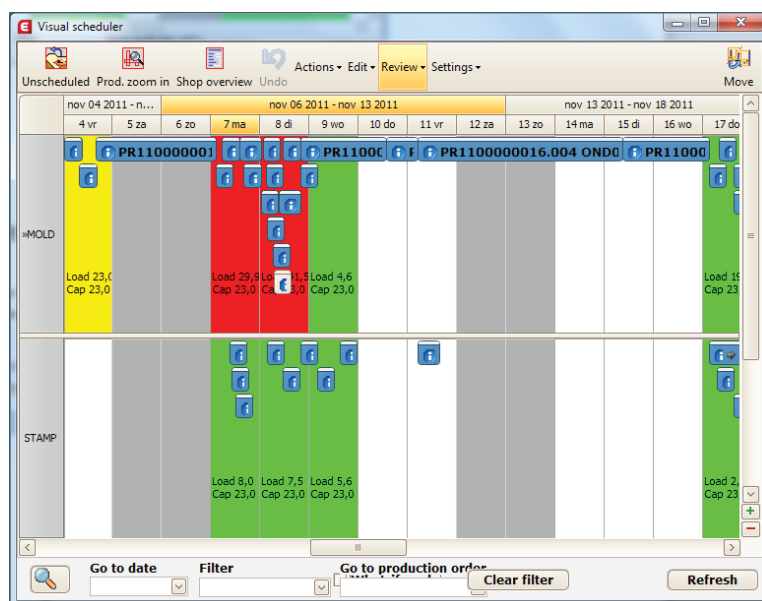
When you click the drop-down menu, it takes you into the **Day** view so that you can view all of the production orders that are scheduled in the same timeframe.



Another option to view all production orders in the scheduled zone is to click the minus sign on the scroll bar to view fewer operations.



In this example, after clicking the minus sign twice, the screen updates and shows all production orders in the Mold operation. Your results will depend on how many production orders are in the selected timeframe.

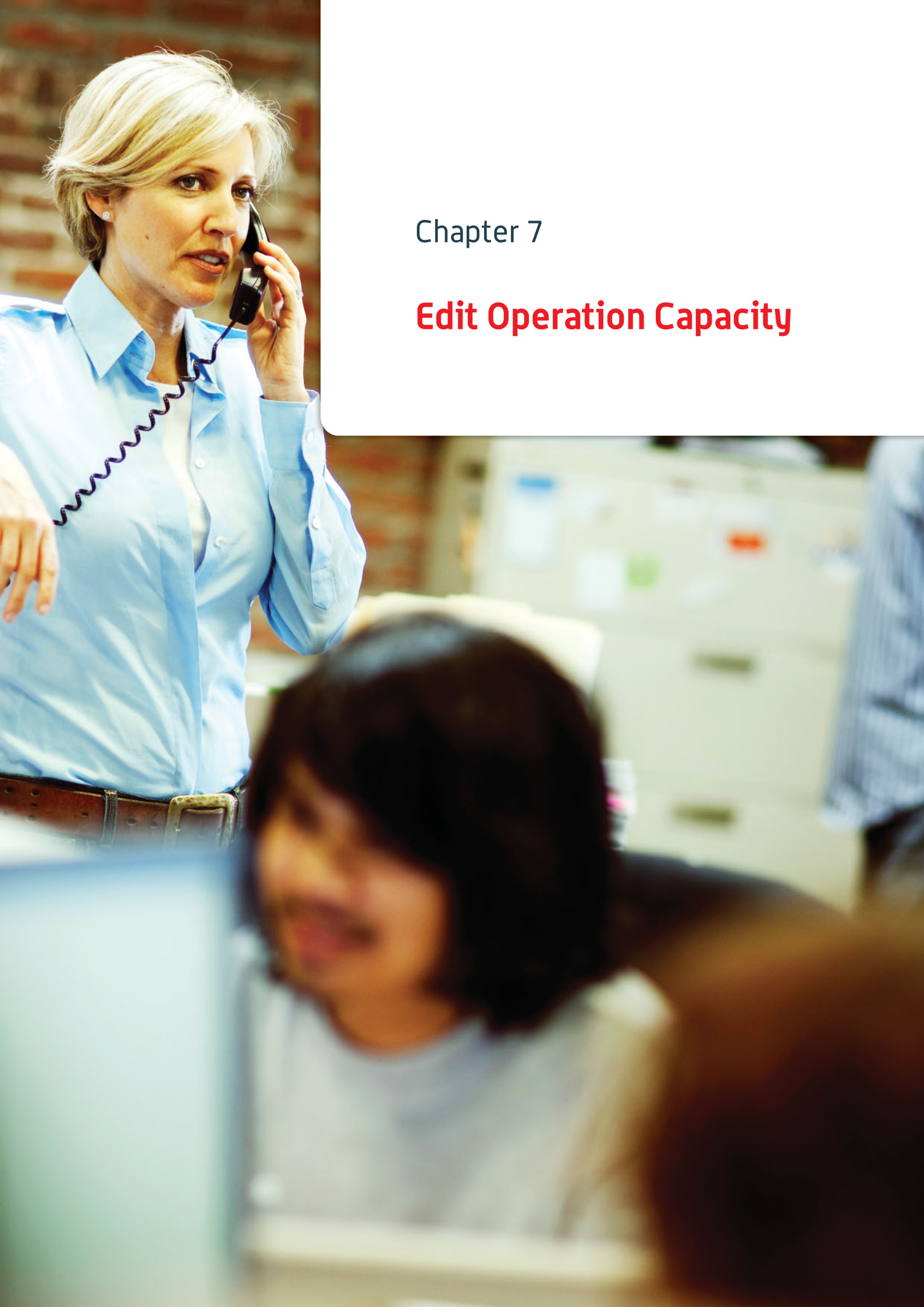


You can also choose how the view options across the top of the screen. For instance, the previous screen is displayed in **Four hour view**. Click the magnifying glass to change the view.

	15 minute view
	Half hour view
	One hour view
	Two hour view
	Four hour view
	Eight hour view
✓	Day view
	Week view
	Month view

You can use the **Go to** options to jump to a specific date or production order.

Go to date	Filter	Go to production order
<input type="text"/>	<input type="text"/>	<input type="text"/>



Chapter 7

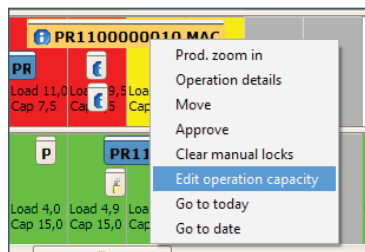
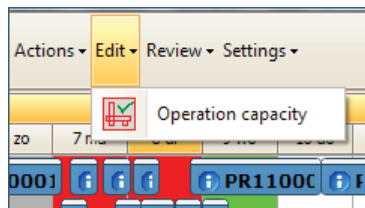
Edit Operation Capacity

7. Edit Operation Capacity

The capacity for each operation can be defined in the operation maintenance (Manufacturing → Setup → Operations). It is possible however, to deviate from the default capacity, for example, if someone called in sick, or a machine broke down.

To edit capacity of operations:

1. Go to Manufacturing → Planning → Visual scheduler.
2. Click **Edit** at the menu bar and select **Operation capacity** or right click the operation you want to edit and click **Edit operation capacity**.



3. After clicking **Edit operation capacity**, a pop-up screen will be displayed.

A screenshot of the 'Edit operation capacity' pop-up window. The window has a title bar and a close button. It contains several sections: 'Select operations' with a list of operations (MOLD, STAMP, ASSEMBLE, PACK) and checkboxes; 'Date range' with 'Start date' and 'End date' dropdowns set to '10-11-2011'; 'Change shift information for selected days in date range' with checkboxes for days of the week (Sunday through Saturday) and a table for shift information. The table has columns for 'Off', 'On', 'Shift', 'Start time', 'End time', 'Break start', 'Break end', and 'Scheduled reso...'. The 'DAY' shift is selected for Thursday. At the bottom, there is a message 'Update to apply capacity changes to selected operations.' and 'Update' and 'Close' buttons.

Off	On	Shift	Start time	End time	Break start	Break end	Scheduled reso...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DAY	8:00	16:00	12:00	12:30	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	EVENING	16:00	0:00	19:00	19:30	1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	NIGHT	0:00	8:00	0:00	0:00	1

To override capacity of operations:

1. In the **Edit operation capacity** screen, under the **Select operations** section, select the check box for each of the operation that you want to apply the changes to.
Note: If you have selected a scheduled operation in the **Shop overview** or **Op. zoom in** form, the operation will be selected by default.
2. At the **Start date** and **End date** fields, type or select the dates to define the start and end dates of the change.
3. Modify the work days and shift details of the selected operation.
4. Click **Update**.
5. Click **Close**.

Buttons**Update**

Click this to apply the capacity changes to selected operations.

Close

Click this to exit.

Fields**Start date**

Type or select a date to define the start date of the change.

End date

Type or select a date to define the end date of the change.

Edit working days

Select this option if you want to edit the days defined in the **Start date** and **End date** fields as work or non-work days.

Edit shift information

Select this option to modify the shift information for the selected days.

Restore defaults

Select this option to restore the shift information of each operation to its default.

Set as non-working day for selected operations

Select this option if you want each day in the specified date range to be a non-work day.

Note: This is available only if you have selected **Edit working days**.

A man with dark hair, wearing a white button-down shirt, is pointing his right hand towards a computer monitor. He is looking at the monitor with a slight smile. The background is a blurred office environment with a large window showing a building outside. The text 'Chapter 8' is overlaid on the top right of the image.

Chapter 8

What-If Scheduling Mode

8. What-If Scheduling Mode

When in **Visual scheduler** all changes are saved automatically. Select the **What-if mode** check box to make changes without having them saved instantly. While in **What-if mode**, you have the option to save any changes that were made while in **What-if mode**. To disable **What-if mode**, clear the check box and you will be asked if you would like to save any changes that were made while in **What-if mode**.

☐ **What-if mode**

Tip: When not in **What-if mode**, you can click the **Undo** button at the top of the screen to reverse any changes that were made.

Chapter 9

Moving Operations



9. Moving Operations

To move a production order from one timeframe to another or from one operation to another, you can use any of the following three options:

- Select the production order and drag it to the new timeframe.
- Select the production order and click the **Move** button.
- Select the production order and right click to access the **Move** option from the menu.

Regardless of which option you select, the **Move step** screen will be displayed and you can choose your options.

Move step - Production order: PR1100000014.003

Destination information Routing settings

New operation
STAMP

Move start from 9-11-2011 23:00:00 ☒ Move to 11-11-2011 0:00
Move end from 10-11-2011 0:00:00 ☐ Move to 12-11-2011 0:00

Routing move options
☐ Move this step only
☐ Include previous steps
☐ Include subsequent steps
☒ Move entire routing

☐ Show operation on move OK Cancel

You then have options to change the operation, start date, and time as well as choose which previous or subsequent operations you want to move.

Note: Moving an operation locks it in place. **Global scheduling** cannot change the start and end times of a locked operation. A lock icon will appear on the operations that were moved.

Selecting different move options have different ramifications to the production order schedule when you reschedule the production order through **Global scheduling**.

Caution: Locked operations will NOT be rescheduled by the **Global scheduling** function.

If you select **Move this step only**, then the operation that was moved as well as the previous and next operations will be locked. The previous and next operations are locked because you are confirming that the current start or end times of both operations are correct and perhaps the only window of time to get this production order done. The previous and next operations are NOT moved, just locked.

If you select **Include previous steps**, then the operation that was moved as well as the next operation is locked. This is because you are telling **Visual scheduler** that the subsequent operations scheduled start or end times should not be changed.

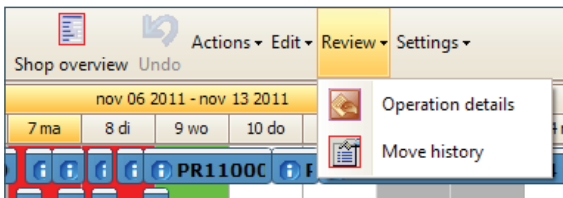
If you select **Include subsequent steps**, then the operation that was moved as well as the previous operation is locked. This is because you are telling **Visual scheduler** that the previous operations scheduled start or end times should not be changed.

If you select **Move entire routing ONLY**, the operation that you are moving will be locked. The next time that this production order is rescheduled, the previous routing lines will be backwards scheduled from the locked operation(s) and the subsequent routing lines will be forward scheduled from the locked operation(s).

Note: When using the **Move entire routing** option, all related suborders will be moved as well.

Move history report

The **Move history** report shows you the timeframe and work center production orders are moved to.



Production order	Old start	New start
PR1100000008.003	5-9-2011	6-9-2011
PR1100000009.006	7-9-2011	8-9-2011

Close



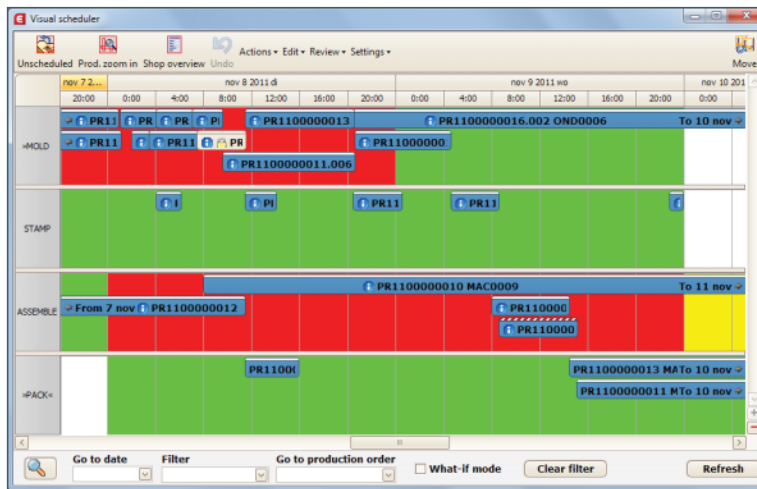
Chapter 10

What Do the Icons and Colors in Exact Visual Scheduler Mean?



10. What Do the Icons and Colors in Exact Visual Scheduler Mean?

In **Visual scheduler**, you will see many different colors on production order indicators as well as icons. The following is a list of those icons and what colors they may show on the screen.



PR1100000012 MAC0007

A production order indicator that is **BLUE** means that the production order is in the Firm zone and the production order has not been approved.

PR1100000012 MAC0007

A production order indicator that is **GREY** and in the Firm zone means that the production order has been approved.

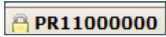
Tip: Production orders outside of the Firm zone will be displayed in grey as well.

i PR1100000012

A production order indicator with the Blue “i” icon means that this production order operation has links or that there is an exception for this operation on the production order. Mouse over the icon to display a tooltip that will explain the icon.

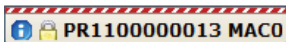
PR1100000011 MAC000

A production order indicator with a red and grey stripe at the top (also called a candy cane stripe) means one of three things: 1) the production order is scheduled past its promise date, 2) the production order has components linked to it and the components are not complete or 3) the production order has material links that are marked as “affects scheduling” and those materials have an actual quantity of 0.



A production order indicator with a lock on it means that the operation is locked and will not be rescheduled by the **Global scheduling** function. You can right click and clear manual locks if necessary.

Note: You may see multiple icons on one production order indicator. For more information, see the following example.



Remember! Mouse over the production order indicator to view detailed production order information.

Chapter 11

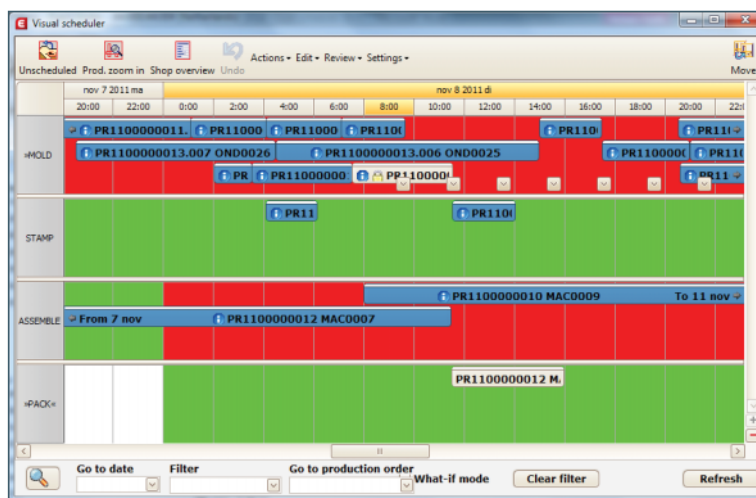
Production Order Zoom In



11. Production Order Zoom In

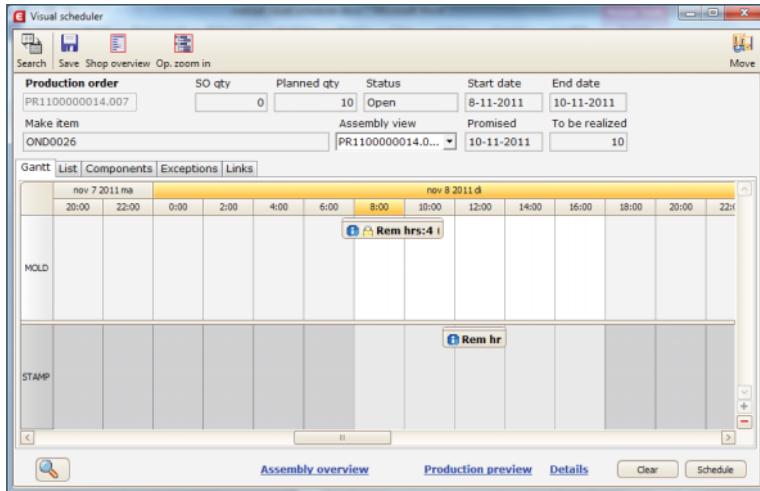
To view one individual production order, you can use the **Production order zoom in** function. You can use this function to manipulate auto links, create manual links, view an Outside Service schedule, preview the production order completion status, or reschedule an individual production order.

Before you click **Prod. zoom In**, click on a production order in the **Op. zoom in** screen. The production order selected will turn orange. If you do not select a production order before clicking **Prod. zoom in**, you will have to manually enter the production order number when the **Prod. zoom in** screen is displayed.



Once you click the **Prod. zoom in** button, the feature allows you to do the following:

- Review the information of the production order in the header section.
- Click the **Production preview** hyperlink to preview the schedule of the production order. This will also show if any portion of the production order has been completed.
- Click **Clear** to clear the current schedule of the production order, if necessary. You might do this if you wanted to manipulate the links that currently exist on the production order.
- Review key details about each production order operation using the **Details** hyperlink.
- Manually link material requirements and/or component production orders to production order operations on the **Links** tab, if necessary (not available yet).
- Review any of the production order operations scheduling information or change their scheduling variables under the **List** tab. You can edit any field under the **List** tab with an *.
- Review the schedule of the production order in a Gantt view or move production order operations under the **Gantt** tab. You can also move production order operations under the **List** tab using the **Move** button at the top right corner of the screen.
- Check the **Scheduling options** dialog.
- Review the components of production order if the production order is an assembly production order.
- Review any scheduling exceptions under the **Exceptions** tab.



- Notes:**
- Use the +/- buttons to show or hide more or less operations.
 - All changes made in **Production order zoom in** screen must be saved.

A woman with short blonde hair, wearing a light blue button-down shirt, is looking directly at the camera while holding a white document. She is pointing at a section of the document with her right index finger. In the background, another person is partially visible, and a computer monitor is on the right. The scene appears to be a professional meeting or office setting.

Chapter 12

Exact Visual Scheduler Dashboard

12. Exact Visual Scheduler Dashboard

Firm Zone Section:

Unapproved Ops refers to the number of production order operations that have been scheduled in the Firm zone without being approved by the scheduler.

A man with glasses and a teal polo shirt is leaning over a woman with glasses and a red cardigan. They are both looking at a white document held by the woman. The background is a blurred office setting with a person in an orange shirt visible in the distance.

Chapter 13

Appendix 1 - Product Update Changes

13. Appendix 1 – Product Update Changes

Product Update	Chapter
404	All chapters
406	4, 6

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