

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

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

[www.lakeshoregroup.com/newsltrs.html](http://www.lakeshoregroup.com/newsltrs.html)

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

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

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

1. Set up an Art process.

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

Here’s an example.

**Process codes**

Process Code: 00005

Description: ART

Abbreviation for reports: ART

How is this process used? Scheduling

Calculation type: Do not estimate running time

**Scheduling:**

Include on initial schedule?

Ask for units produced?

Type scheduling: Schedule after order date

Begin: 0 day(s) after order date

Schedule both begin & end dates

**Status update e-mails when process marked complete**

Send to: Customer/Acknowledgment address?  Customer/Ship Confirmation address?  Salesman?

Specific address(es)

Text of e-mail:

Click  
^6534 to insert ship date  
^6536 to insert ship via  
^6615 to insert shipping address

Save Print Plus Reset Exit

Additional variables are available for e-mail text. Call Tech Support for more information.

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

## 2. Monitor the art process in Work in Process

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



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

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

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

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

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

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

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

## Scheduling screen for process

*Review production schedule*

Process: ART  
Date: 3/28/12

[Refresh](#)






Order number	Reference	Priority	Estimated Time Required	Time Already Logged	Time Scheduled This Date	Ship date	Begin Date	End Date	Reschedule this order	Update Job Status	Update Process Status
002700						3/30/12	3/27/12	3/27/12		<input checked="" type="checkbox"/>	
002718			1:00			4/ 6/12	3/28/12			<input checked="" type="checkbox"/>	
002719			1:00		1:00		3/28/12	3/28/12		<input checked="" type="checkbox"/>	
002720			1:00		1:00		3/28/12	3/28/12		<input checked="" type="checkbox"/>	
<b>Total</b>			<b>3:00</b>		<b>2:00</b>						

Previous process complete
  This process past due!

## Scheduling screen for an employee

*Review production schedule*

Employee: Kaye Keady  
Date: 3/28/12

[Refresh](#)






Order number	Reference	Priority	Estimated Time Required	Time Already Logged	Time Scheduled This Date	Ship date	Begin Date	End Date	Reschedule this order	Update Job Status	Update Process Status
002700 ART						3/30/12	3/27/12	3/27/12		<input checked="" type="checkbox"/>	
<b>Total</b>											

Previous process complete
  This process past due!

You can periodically click on the “Refresh” link at the top of the screen to check for new orders.

## Rescheduling screen

*Schedule order*

Order number: 002700

Ship date: 3/30/12

Change project finish date here

Clear all dates from schedule

Clear all employee codes from schedule

Reschedule

Include?	Process	Begin Date	End Date	Estimated Time Required Hours : Minutes	Employee	Priority
<input checked="" type="checkbox"/>	00005   ART	3/27/12	3/27/12		KK	

Save

Reset

Assign to an employee here

Add a new process

Exit

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