

State of the Job

One of the new features included in the March 2017 semiannual update to the Realtrac Performance ERP is a feature called the **State of the Job**. In preparing our March 2017 update, one need identified by our users was to have more clarity in to the status of a job, especially when a member of the management or ownership goes to close out the job. Thus, the Realtrac **State of the Job** feature was born! Read on for more details on what the **State of the Job** feature is and how it works.

The screenshot displays the 'State of the Job' window for Job Group - (16J2119). The window title is 'Job Group - (16J2119)' and it has a 'List Jobs' tab selected. The main content area is divided into several sections:

- Summary and Alerts for Job: 16J2119**
Part: 5B: 004
Customer: Fuerst's 1st Company
Draw: 08081978-02
Qty Ordered: 100
Qty to Manufacture: 100
- Cost Summary Table:**

	Each	Total
Cost	\$26.86	\$2686.18
Price	\$28.54	\$2854.00
Profit	\$1.68	\$167.82
- Router Operations Table:**

Pri	Issue	Resolve	Noted
op: 10	dg shape Actual time is 50% of estimated time or less.	N/A	-
op: 10	dg shape Work center rate: \$150.00 actual rate: \$178.88	N/A	-
op: 15	Large Capacitor Not closed.	Open Router	-
op: 16	Not closed.	Open Router	-
op: 16	There is estimate time but no actual time logged. (Est cost: \$1,083...	Open Router	-
op: 20	Something else Actual time is 50% of estimated time or less.	N/A	-
op: 20	Something else Work center rate: \$65.00 actual rate: \$93.88	N/A	-
op: 30	asdadeqve Work center rate: \$90.00 actual rate: \$108.88	N/A	-
op: 30	asdadeqve Cost: \$676.87 is more than what was estimated: \$533.33	N/A	-
- Purchase Orders Table:**

Issue	Resolve	Noted
PO: 15058 for vendor Eckler & Eckler & Sons Has been issued but not closed.	Open PO	-
Line: 1 Item Plywood sheet 4' X 8' Received 0 of 1.	Open PO	-
- Job Misc Table:**

Issue	Resolve	Noted
There is a backorder of 22 that hasn't shipped for this job	Open Job Entry	-
- Shipments Table:**

Issue	Resolve	Noted
Ship schedule for date 1/13/2017 Shipped 78 of 100.	Open Ship Sch	-

Figure 1 Sample "State of the Job"

Introduction & Permissions

Starting with the release of Client version 10.9, when a user goes to close a job by setting the closed date, they will automatically be routed to the **State of the Job** tab within the Job Group (users can also freely click on the **State of the Job** tab within the Job Group directly). Since the **State of the Job** group does an analysis on everything related to the job including buyout costs and labor costs, access to the **State of the Job** feature is a permission that can be assigned on an employee by employee basis. Keep in mind that if you give an employee access to the State of the Job, they will see financial costing information.

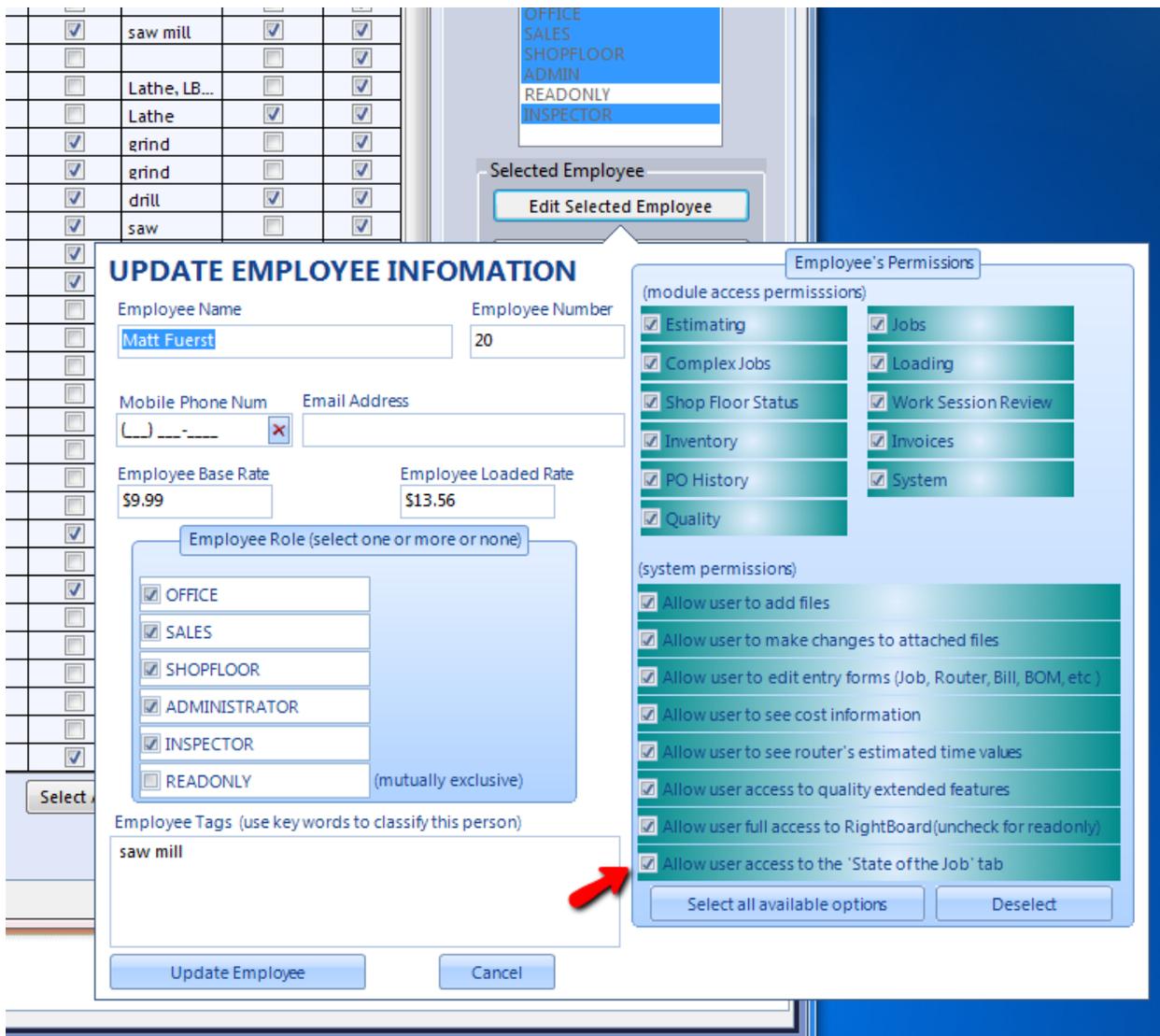


Figure 2 Assign permission to employees to use State of the Job

Usage

Once an employee has been granted permission to use **State of the Job**, they will be able to access the State of the Job tab on any job: whether open, finished or closed. While one of the main intentions of the **State of the Job** system is to make it easy to close jobs, the system can be used at any time to get a quick snapshot on the overall health and status of the job.

Alerts within the **State of the Job** interface can be actionable or not actionable. Actionable alerts will have a button under the “Resolve” column that will launch the user to the specific interface to address the alert. For example, an actionable item could involve a Purchase Order that is still open, or a quantity still back ordered and not delivered. In this specific case, the button under the Resolve column will be labeled “Open PO”, which will allow the user to go directly to the PO in question to close the PO or further research the status of the items on the order.

Not all items are directly actionable. For example, the **State of the Job** interface lets the user know if a closed router operation took less than half of the estimated time before being closed and completed. This isn't a situation that requires any direct action, but it is something the user may be interested in investigating further (or altering the estimated times, so the next time the part/router is run, the estimate will be more accurate).

If a user isn't sure what a specific alert means, they can hover over the icons on the left, and Realtrac will automatically pop up a detailed message with more information, along with some ideas to remedy the situation.

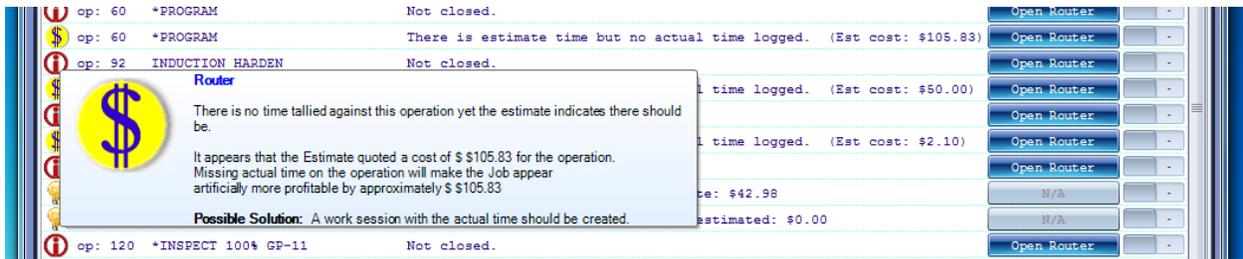


Figure 3 Hover over the icons on the left side of the screen for additional details, some ramifications of the issue, and ideas on how to address them

It's possible that users will choose to not act on actionable alerts. Users may wish to note that they accept and understand the alert, and not actually address or "fix" the situation. The "Noted" column in the screen allows the Realtrac user to make note that they acknowledged the alert, but do not intend to act upon it. Users can click in the Noted column to switch the status to "ACK", to signify they acknowledge the alert, and purposefully do not intend to act upon it (note that Realtrac both timestamps the acknowledgement as well as remembers which Realtrac user made the decision).

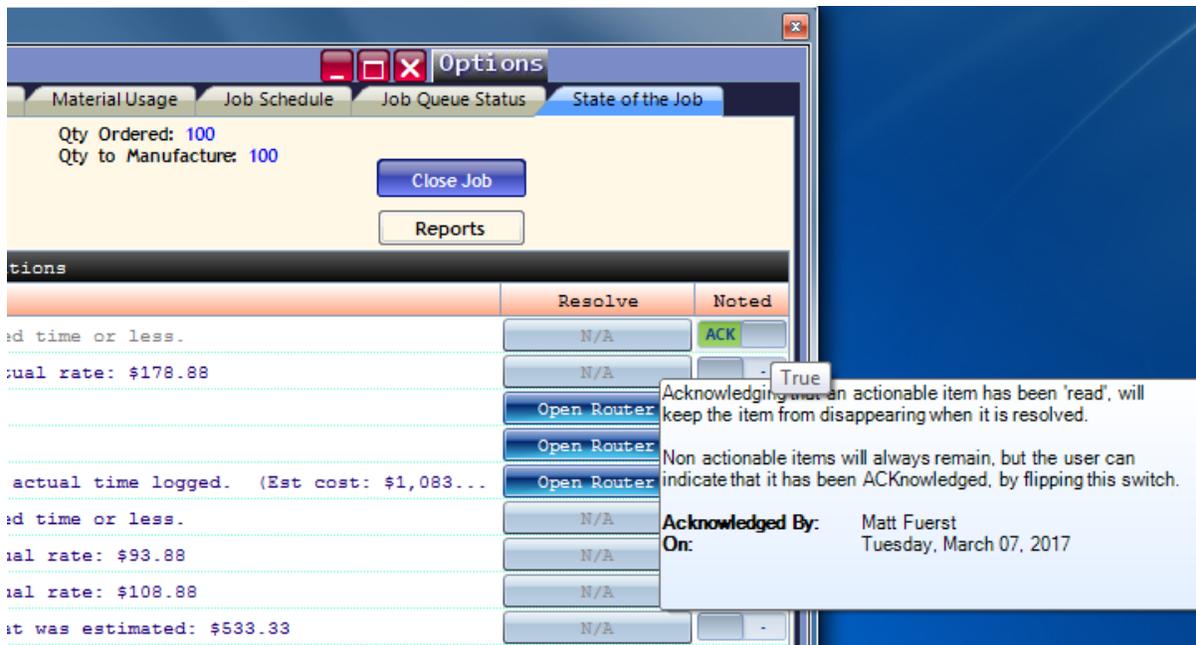


Figure 4 Acknowledge an alert in the State of the Job

The **State of the Job** tab also features a Reports button to bring up the Realtrac report selection interface. Users are able to run any of the Realtrac cost analysis reports on the job directly from this screen, without having to switch over to any other interfaces to run these reports.

Not all actionable alerts need to be dealt with. Users are free to address the alerts, ignore the alerts and use the built in acknowledgement system to note that they intentionally ignored the alert, or simply ignore the alert altogether. At any time, the user is able to click the Close Job button on the **State of the Job** interface and actually close the job.

Alert Categories and Details

The broad categories of alerts the **State of the Job** presents, and some sample alerts that the Realtrac business intelligence finds includes:

Router Operations

- Router operations that remain open.
- Router operations that were completed in < 50% of estimated time.
- Router operations that were completed in >150% of estimated time.
- Router operations where the actual labor and work station costs exceed the estimated costs.
- Work Center (estimated labor + station) rates are lower the actual Work Station plus Employee labor rates. (This can happen when an expensive laborer uses an expensive work station in your center. For example, if your Saw Work Center is estimated to cost \$60 an hour, but your most expensive employee, earning \$35 an hour logs on to your most expensive saw that runs at \$40 an hour, those sessions are costing \$75 an hour as opposed to the estimated \$60 an hour. Another possibility is that your work center rates are too low for the average station and laborer using the stations in the center.)

Purchase Orders

- Purchase orders associated with the job that remain open.
- Purchase orders where outstanding material or services for the job have yet to be received.

Job Miscellaneous

- Back order that remains unfulfilled.

Quality

- Open Non-Conformances associated with the job.

Shipments

- Scheduled Shipment (see the Job's Ship Schedule tab) that have yet to be fulfilled.

Inventory

- Items allocated to the job, but not yet moved to the job.

Invoices

- Invoices that have been created by not printed.
- Packing Lists that have been created by not printed.
- Packing Lists that have not had inventory committed.
- Credit memos that have been created but not yet printed.

Version History

Version 1.0 – March 7, 2017 – Initial release.

Version 1.1 – March 9, 2017 – Minor edits.