



User Guide

MR Extended  
V21.1.0200

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EFI PrintStream | V21.1.0200 MR Extended User Guide

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# Introduction

## Overview

The MR Extended guide contains information about Cost Centers and Job Scheduling, as well as other PrintStream Scheduler components.

## Contact Information

### EFI Support

|                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>US Phone:</b>                                                                                                                                                                                                                                      | 855.334.4457 (first select option 3, then press option 8, then press option 1)                                                                                                                                         |
| <b>US Fax:</b>                                                                                                                                                                                                                                        | 415.233.4157                                                                                                                                                                                                           |
| <b>US E-mail:</b>                                                                                                                                                                                                                                     | <a href="mailto:printstream-support@efi.com">printstream-support@efi.com</a>                                                                                                                                           |
| Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue. |                                                                                                                                                                                                                        |
| <b>Note</b>                                                                                                                                                                                                                                           | For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues. |

### EFI Professional Services

|                  |                                                                                                    |
|------------------|----------------------------------------------------------------------------------------------------|
| <b>US Phone:</b> | 651.365.5321                                                                                       |
| <b>US Fax:</b>   | 651.365.5334                                                                                       |
| <b>E-Mail:</b>   | <a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a> |



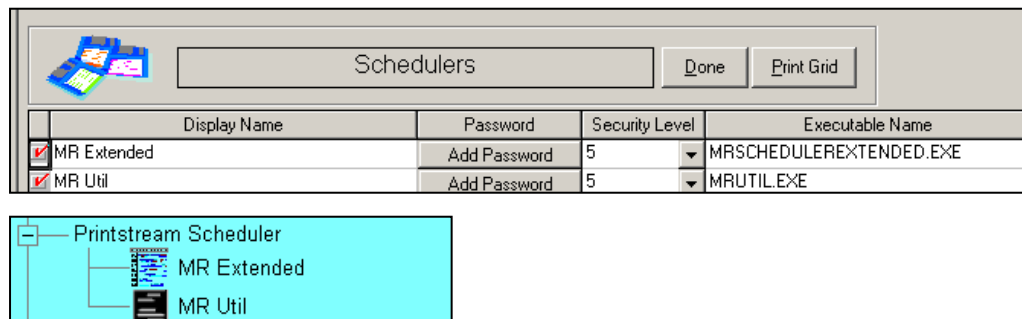
## Setup

### Setup Scheduler Program Group

#### *To setup a Scheduler Program Group*

1. Select the **Menus and Users** icon under the **Administration** bar.
2. Right-click **Program Groups** to open **Add a new Group**.
3. Enter a group name, e.g., Scheduling, and click **Save**.
4. Find your new program group from the **Select a Program Group** menu.
5. Locate **MR Extended** and **MRUtil** and check the box to add these programs to your new program group.
6. Edit the display name if desired and select **Refresh Program List**.

Be sure to add this program to the appropriate **User Groups**.



|                                     | Display Name | Password     | Security Level | Executable Name         |
|-------------------------------------|--------------|--------------|----------------|-------------------------|
| <input checked="" type="checkbox"/> | MR Extended  | Add Password | 5              | MRSCHEDULEREXTENDED.EXE |
| <input checked="" type="checkbox"/> | MR Util      | Add Password | 5              | MRUTIL.EXE              |

Printstream Scheduler

- MR Extended
- MR Util

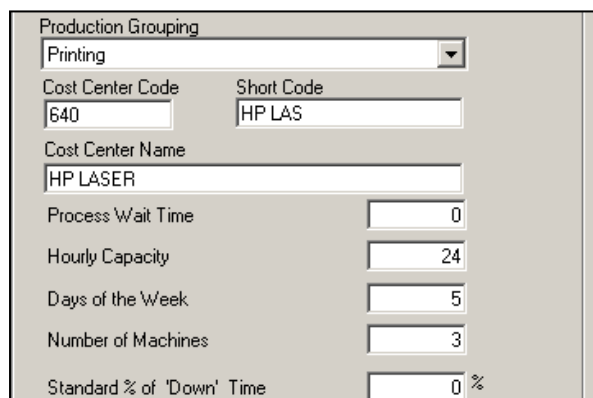
### Setup Cost Centers to Schedule

Cost Centers must have capacity defined in **Master File Reports** to be visible in the **MR Extended**.

#### *To setup Cost Centers to Schedule*

1. Enter **Hourly Capacity** to describe how many hours daily the Cost Center is active, **Days of the Week** to describe how many days the Cost Center is active weekly, and **Number of Machines** to describe how many machines are available per shift.
2. If the Cost Center requires people rather than machines, e.g., Handwork, enter the number of workers in **Number of Machines**.

This capacity definition can be further refined to specific days/shifts within the **MR Extended**.



Production Grouping

Printing

Cost Center Code: 640 Short Code: HP LAS

Cost Center Name: HP LASER

Process Wait Time: 0

Hourly Capacity: 24

Days of the Week: 5

Number of Machines: 3

Standard % of 'Down' Time: 0 %

## Import Cost Centers into MR Extended

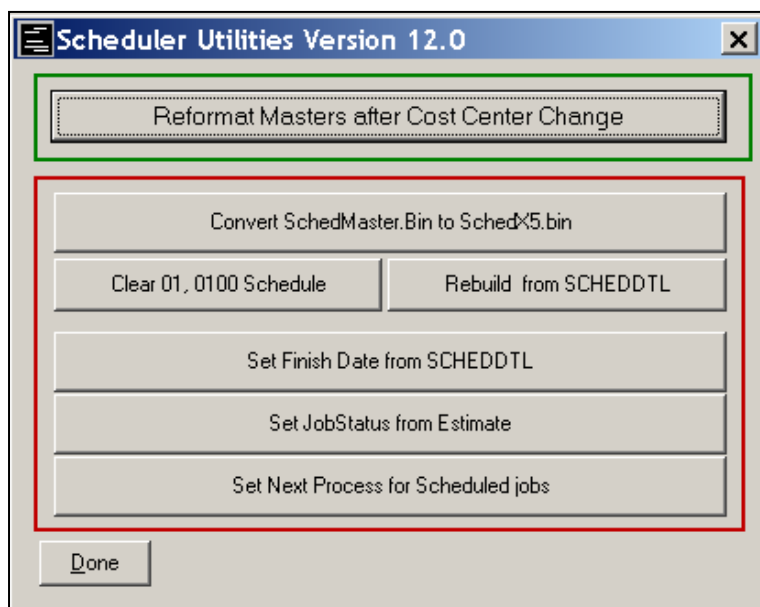
Once Cost Center(s) capacity has been defined, the **MR Extended - Reformat Masters Utility** below must be run.

### To run the Scheduler, Reformat Utility

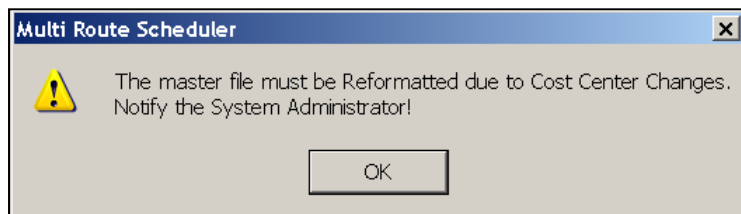
1. Select **Reformat Masters after Cost Center Change**.

This will enter any new Cost Center(s) with defined capacity into both the **MR Extended** and the **MR Shop Supervisor** programs.

Note that once this utility has been run, any additional Cost Center(s) capacity edits *must* be done within the **MR Extended**; capacity edits in **Master File Reports** will introduce Cost Center errors.



2. Do not run any of the other utilities. Contact PrintStream Support for assistance.
3. If new Cost Centers are added in **Master File Reports**, or if existing Cost Centers without capacity are given capacity, neither the **MR Extended** nor the **Shop Floor** program will function until the **Scheduler Reformat Utility** is run. Users will get the following message when opening either program:

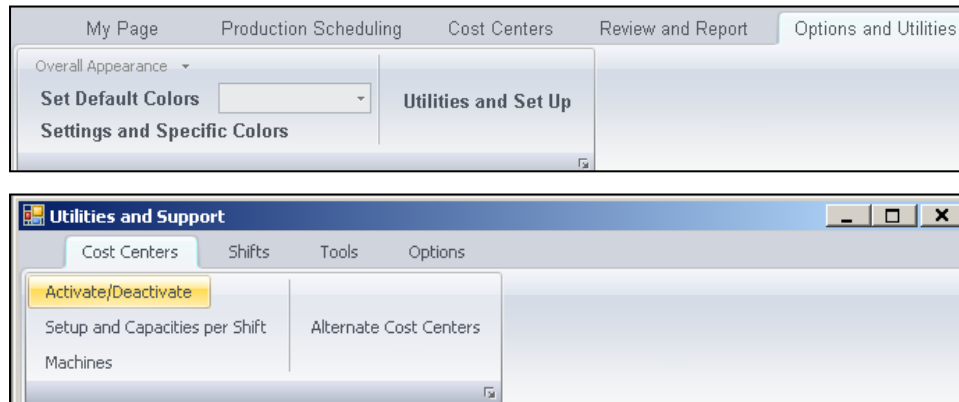


## Activate / Deactivate Cost Centers

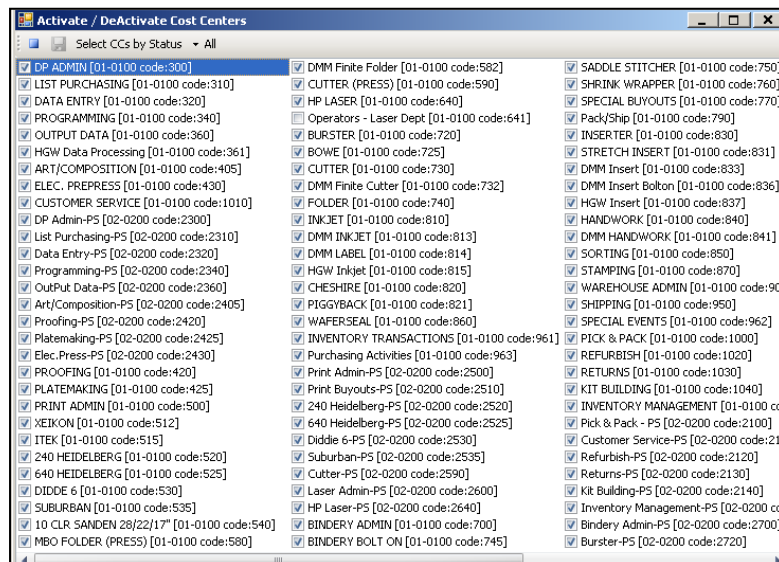
Cost Centers within the **MR Extended** can be deactivated, and this action can be reversed.

### To activate / deactivate Cost Centers

1. Open **Activate/Deactivate Cost Centers** from the **Utilities and Set Up** menu option.



2. To remove a Cost Center from the MR Extended, locate the active Cost Center, clear the check box, and click **Save** to deactivate.
3. To return this Cost Center to the MR Extended, select the check box preceding the inactive Cost Center and click **Save** to activate.



4. The MR Extended must be restarted for the changes to take effect.

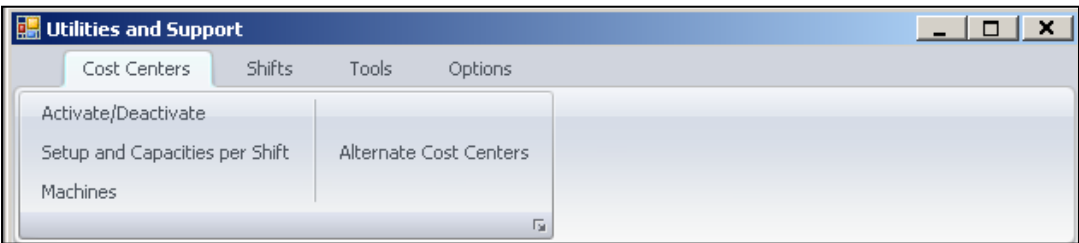
# Refine Cost Center Capacity

Cost Center capacity can be fine-tuned within the **MR Extended** program.

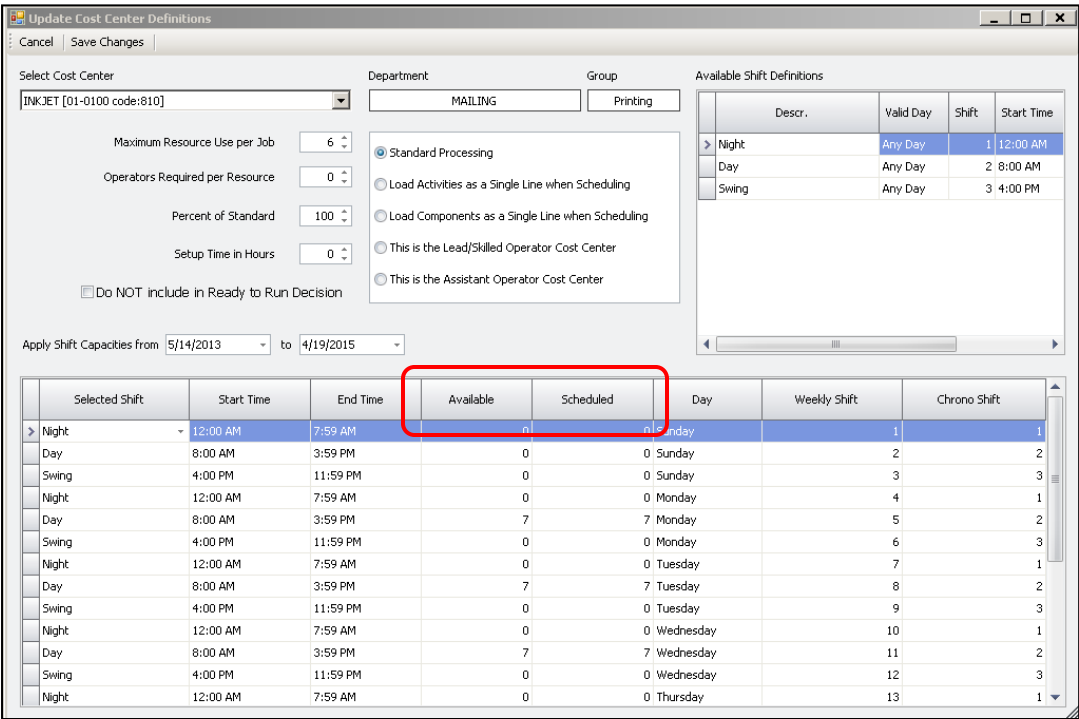
The two elements which create the total amount of resource time available to be scheduled, per Cost Center/day/shift, are the number of available resources and the duration of the shift.

**To edit the available resources**

- 1. Open **Setup and Capacities per Shift** from the **Utilities and Support** menu option.



- 2. Select a Cost Center from the list:





3. The Cost Center –Update Cost Center Definitions window is used to define resource capacity per shift. This amount of time is calculated using the duration of the shift **X** the number of resources which schedule. The **Available** fields represent the number of resources which exist per shift/day. The **Scheduled** fields represent the number of resources you schedule per shift/day. It should be equal to, or less than, the **Available** column. Edit these numbers to describe how many resources you schedule per shift/day. Above, the **Inkjet** runs 1 shift with 7 machines thru the week with no scheduled shifts on the weekend. Below, the **Inkjet** has been edited to include a second shift on Saturday with two machines.

|  | Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|--|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
|  | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Wednesday | 10           | 1            |
|  | Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Wednesday | 11           | 2            |
|  | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Wednesday | 12           | 3            |
|  | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Thursday  | 13           | 1            |
|  | Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Thursday  | 14           | 2            |
|  | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Thursday  | 15           | 3            |
|  | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Friday    | 16           | 1            |
|  | Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Friday    | 17           | 2            |
|  | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Friday    | 18           | 3            |
|  | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Saturday  | 19           | 1            |
|  | Day            | 8:00 AM    | 3:59 PM  | 7         | 2         | Saturday  | 20           | 2            |
|  | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Saturday  | 21           | 3            |

4. Select **Save Changes** to save. Note that shift definitions can be set to start in the future, and they can be given an ending date. If the capacity change is permanent, leave the default ending (which displays the end of the current scheduling period).

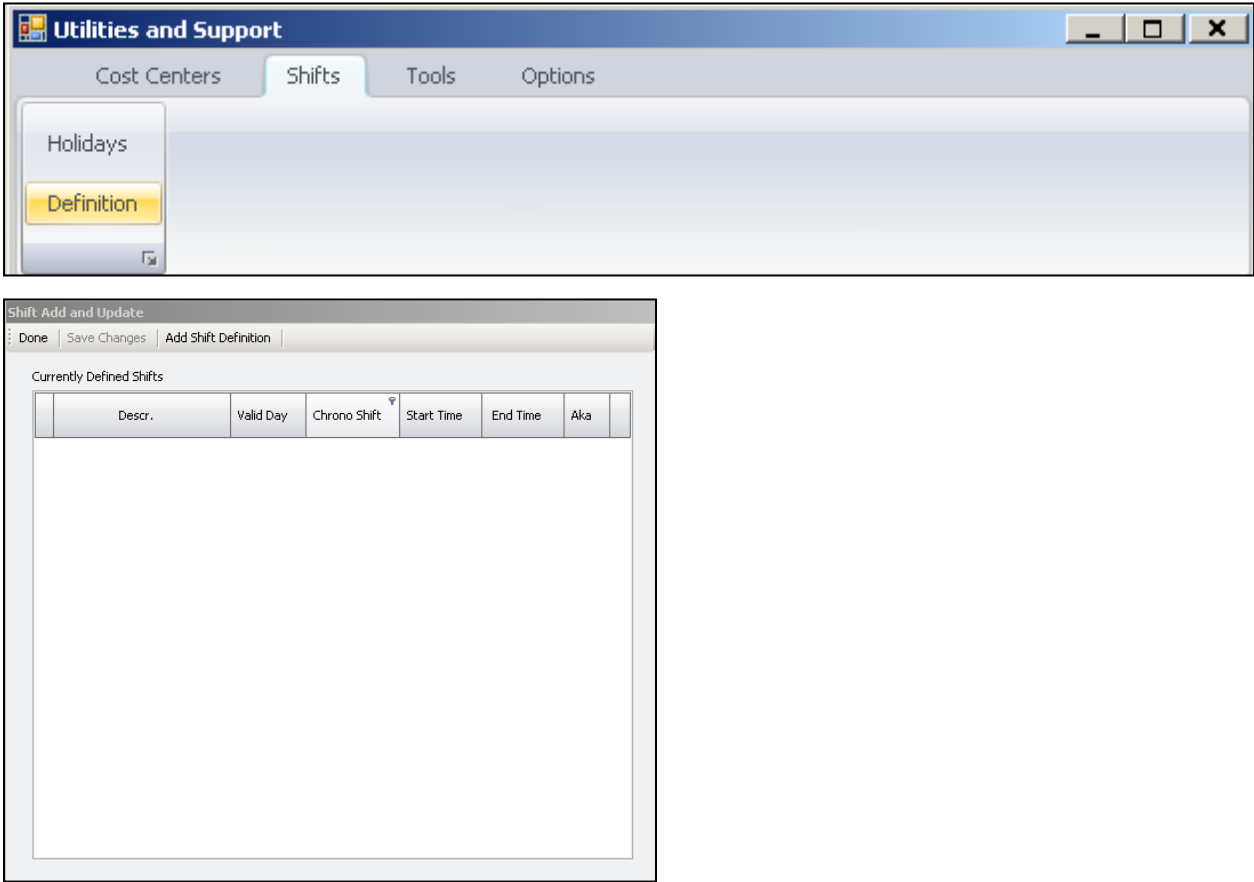
| Apply Shift Capacities from 5/14/2013 to 4/19/2015 |                |            |          |           |           |           |              |              |
|----------------------------------------------------|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
|                                                    | Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|                                                    | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Wednesday | 10           | 1            |
|                                                    | Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Wednesday | 11           | 2            |
|                                                    | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Wednesday | 12           | 3            |
|                                                    | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Thursday  | 13           | 1            |
|                                                    | Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Thursday  | 14           | 2            |
|                                                    | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Thursday  | 15           | 3            |
|                                                    | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Friday    | 16           | 1            |
|                                                    | Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Friday    | 17           | 2            |
|                                                    | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Friday    | 18           | 3            |
|                                                    | Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Saturday  | 19           | 1            |
|                                                    | Day            | 8:00 AM    | 3:59 PM  | 7         | 2         | Saturday  | 20           | 2            |
|                                                    | Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Saturday  | 21           | 3            |



# Shift Definition

**Holidays** – Currently not available. This can be set-up in MR Scheduler.

Shifts are defined in the MR Extended. The shift duration X the Cost Center resource(s) creates the total amount of available resource time to be scheduled, per Cost Center/shift/day.



*Three shifts* must be defined. Added together, these **three shifts must equal 24 hours**. Times are defined using a 24-hour clock. Each shift's end time should be one minute less than the following shift's start time, so that there is no time overlap.

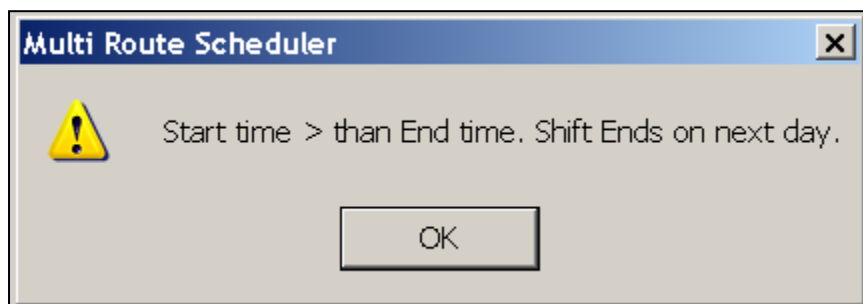
### To enter or edit your first three shifts

1. Select the **Add Shift Definition**.
2. Enter the name of the shift (e.g., day shift or first shift), into the **Description** field.
3. Select **Any Day**, and select which shift is being defined in the **Daily Shift** field and **Valid Chrono Shift**.
4. Enter start and stop times, then select **Add and Save Changes**.

|                                          |                                         |                                       |
|------------------------------------------|-----------------------------------------|---------------------------------------|
| Description                              |                                         | Valid Week Day                        |
| <input type="text" value="Night"/>       |                                         | <input type="text" value="Any Day"/>  |
| Start Time                               | End Time                                | Valid Chrono Shift                    |
| <input type="text" value="12:00:00 AM"/> | <input type="text" value="7:59:00 AM"/> | <input type="text" value="1"/>        |
| <input type="button" value="Cancel"/>    |                                         | <input type="button" value="Update"/> |

Shift number 1 must be the shift which occurs at 00:01 am.

You may begin this shift the preceding night. If your first shift crosses midnight, you will get the following notification:



5. Affirm the above message. Define shifts number 2 and 3.

Below is one possible definition of the remaining shifts.

|                                         |                                         |                                       |
|-----------------------------------------|-----------------------------------------|---------------------------------------|
| Description                             |                                         | Valid Week Day                        |
| <input type="text" value="Day"/>        |                                         | <input type="text" value="Any Day"/>  |
| Start Time                              | End Time                                | Valid Chrono Shift                    |
| <input type="text" value="8:00:00 AM"/> | <input type="text" value="3:59:00 PM"/> | <input type="text" value="2"/>        |
| <input type="button" value="Cancel"/>   |                                         | <input type="button" value="Update"/> |

Description

Swing

Valid Week Day

Any Day

Start Time

4:00:00 PM

End Time

11:59:00 PM

Valid Chrono Shift

3

Cancel

Update

You cannot overlap shifts.

Shift Add and Update

Done | Save Changes | Add Shift Definition

Currently Defined Shifts

|   | Descr. | Valid Day | Chrono Shift | Start Time | End Time | Aka |   |
|---|--------|-----------|--------------|------------|----------|-----|---|
|   | Night  | Any Day   | 1            | 12:00 AM   | 7:59 AM  |     | 1 |
|   | Day    | Any Day   | 2            | 8:00 AM    | 3:59 PM  |     | 2 |
| > | Swing  | Any Day   | 3            | 4:00 PM    | 11:59 PM |     | 3 |

## Alternative Shifts

You can define up to 42 additional shifts which operate during different time periods than any of the **first three shifts**.

Pictured below is a 10-hour mid-day Saturday shift #4.

|                                             |                                         |                                       |
|---------------------------------------------|-----------------------------------------|---------------------------------------|
| Description                                 |                                         | Valid Week Day                        |
| <input type="text" value="Saturday Shift"/> |                                         | <input type="text" value="Saturday"/> |
| Start Time                                  | End Time                                | Valid Chrono Shift                    |
| <input type="text" value="8:00:00 AM"/>     | <input type="text" value="6:00:00 PM"/> | <input type="text" value="2"/>        |
| <input type="button" value="Cancel"/>       |                                         | <input type="button" value="Update"/> |

| Shift Add and Update                       |                |           |              |            |          |     |
|--------------------------------------------|----------------|-----------|--------------|------------|----------|-----|
| Done   Save Changes   Add Shift Definition |                |           |              |            |          |     |
| Currently Defined Shifts                   |                |           |              |            |          |     |
|                                            | Descr.         | Valid Day | Chrono Shift | Start Time | End Time | Aka |
|                                            | Night          | Any Day   | 1            | 12:00 AM   | 7:59 AM  | 1   |
|                                            | Day            | Any Day   | 2            | 8:00 AM    | 3:59 PM  | 2   |
|                                            | Swing          | Any Day   | 3            | 4:00 PM    | 11:59 PM | 3   |
| >                                          | Saturday Shift | Saturday  | 2            | 8:00 AM    | 6:00 PM  | 4   |

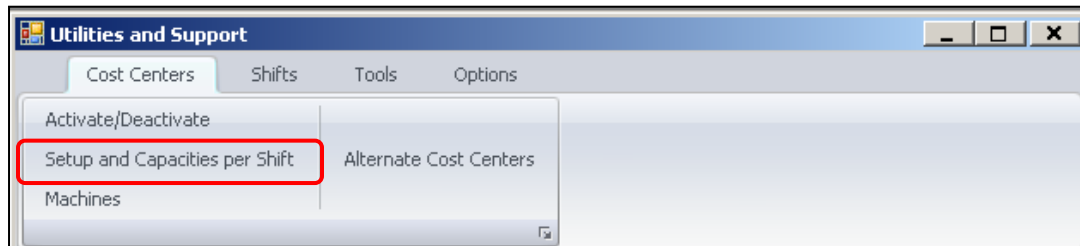
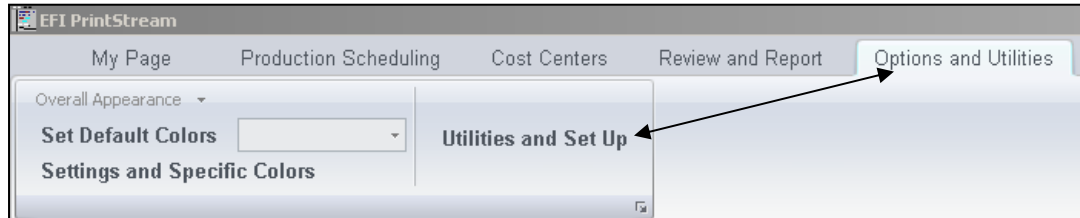
## Update Cost Center Shifts

Cost Center Shift Capacity = # of Cost Center Resources X Shift Duration.

Cost Center shift duration can also be fine-tuned within the **MR Extended**.

### To edit the shift duration

1. Select **Options and Utilities > Utilities and Set Up**.
2. Select **Setup and Capacities per Shift**.



3. Select a Cost Center.

This window is used to define the duration of each Cost Center's shifts, the number of available resources per shift, and how many of those available resources can be scheduled. This window will default to placing shifts 1, 2 and 3 in chronological order.

**Update Cost Center Definitions**

Cancel Save Changes

Select Cost Center: [INKJET [01-0100 code:810]]

Department: MAILING Group: Printing

Maximum Resource Use per Job: 6

Operators Required per Resource: 0

Percent of Standard: 100

Setup Time in Hours: 0

☐ Do NOT include in Ready to Run Decision

Standard Processing (selected)

Load Activities as a Single Line when Scheduling

Load Components as a Single Line when Scheduling

This is the Lead/Skilled Operator Cost Center

This is the Assistant Operator Cost Center

Apply Shift Capacities from: 5/21/2013 to 4/19/2015

**Available Shift Definitions**

| Valid Day | Shift | Start Time | End Time | Alk |
|-----------|-------|------------|----------|-----|
| Any Day   | 1     | 12:00 AM   | 7:59 AM  | 1   |
| Any Day   | 2     | 8:00 AM    | 3:59 PM  | 2   |
| Any Day   | 3     | 4:00 PM    | 11:59 PM | 3   |
| Saturday  | 4     | 8:00 AM    | 6:00 PM  | 4   |

**Shift Capacities Table**

| Selected Shift | Start Time | End Time | Available | Scheduled | Day         | Weekly Shift | Chrono Shift |
|----------------|------------|----------|-----------|-----------|-------------|--------------|--------------|
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | 0 Sunday    | 1            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 0         | 0         | 0 Sunday    | 2            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | 0 Sunday    | 3            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | 0 Monday    | 4            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | 7 Monday    | 5            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | 0 Monday    | 6            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | 0 Tuesday   | 7            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | 7 Tuesday   | 8            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | 0 Tuesday   | 9            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | 0 Wednesday | 10           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | 7 Wednesday | 11           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | 0 Wednesday | 12           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | 0 Thursday  | 13           | 1            |

4. Select the alternative shift from the **Selected Shift** drop-down into the appropriate day/shift(s). In the example below, Saturday's Day Shift #2 is being replaced by AKA shifts Saturday Shift #4. Saturday Shift is two hours longer than Day shift. These two hours, multiplied by the seven available resources, will add 14 additional available hours to schedule the Inkjet on Saturdays.
5. Select Cost Center – Locate the shift, using the drop-down in **Selected Shift**, choose the Alternate Shift, define the number of **Available and Scheduled**, then select **Save Changes**.

**Update Cost Center Definitions**

Cancel Save Changes

Select Cost Center: **INKJET [01-0100 code:810]**

Department: MAILING Group: Printing

Maximum Resource Use per Job: 6

Operators Required per Resource: 0

Percent of Standard: 100

Setup Time in Hours: 0

☐ Do NOT include in Ready to Run Decision

Apply Shift Capacities from: 5/21/2013 to 4/19/2015

Available Shift Definitions

| Valid Day | Shift | Start Time | End Time | Aka |
|-----------|-------|------------|----------|-----|
| Any Day   | 1     | 12:00 AM   | 7:59 AM  | 1   |
| Any Day   | 2     | 8:00 AM    | 3:59 PM  | 2   |
| Any Day   | 3     | 4:00 PM    | 11:59 PM | 3   |
| Saturday  | 4     | 8:00 AM    | 6:00 PM  | 4   |

Standard Processing

☐ Load Activities as a Single Line when Scheduling

☐ Load Components as a Single Line when Scheduling

☐ This is the Lead/Skilled Operator Cost Center

☐ This is the Assistant Operator Cost Center

| Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Wednesday | 10           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Wednesday | 11           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Wednesday | 12           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Thursday  | 13           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Thursday  | 14           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Thursday  | 15           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Friday    | 16           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 7         | 7         | Friday    | 17           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Friday    | 18           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Saturday  | 19           | 1            |
| Saturday Shift | 8:00 AM    | 6:00 PM  | 7         | 7         | Saturday  | 20           | 2            |
| Day            | 4:00 PM    | 11:59 PM | 0         | 0         | Saturday  | 21           | 3            |

## Updating Cost Centers: Additional Resource Controls

**Maximum Resource Use/Job:** This option allows you to set an optional maximum resource usage when multiple resources are used on large and/or fast turn jobs.

Maximum Resource Use per Job

The default resource usage is one Cost Center resource per job step.

**Operators Required per Resource - MR Extended** can link labor resource requirements to machine scheduling. This labor resource requirement can be set per Cost Center or activity code for all price lists (mail) activity codes. It can be set per Cost Center for all cost-plus markup (print) activity codes. To set per Cost Center, enter a figure in **Operators Required per Resource**.

**Note** The field will accept numbers in units of one tenth.

Operators Required per Resource

This will create a restriction on scheduling, i.e., resources must be available in both the machine Cost Center and the operator Cost Center in order to schedule the job step.



☒ Standard Processing  
☐ Load Activities as a Single Line when Scheduling  
☐ Load Components as a Single Line when Scheduling  
☐ This is the Lead/Skilled Operator Cost Center  
☐ This is the Assistant Operator Cost Center

Cost Centers can be created solely to define labor resources per shift/day. These labor pools are available to all activities within the same **PrintStream Production Department**. *Setup and use of labor pools is explained later in this document.*

**Percent of Standard** will alter the run speed for all activity codes which are scheduled in this Cost Center. Schedulers can use this to fine tune actual production time required to correctly schedule without altering estimating data.

Percent of Standard

**Setup Time in Hours** will add the amount entered as minutes into this field to every activity code which schedules in this Cost Center. This can be used to account for tasks such as reading the work instructions.

Setup Time in Hours

**Do NOT include Ready to Run Decision** as MR. Extended goes through deciding what steps are ready and whether all predecessor activities are complete. This option, if checked prevent, activities in that Cost Center from being considered in the decision. For Example –If MR. Extended is looking at a print step and there are five activities that must complete before it can run, if three of them were in a Cost Center with DNI set it won't care whether they are complete or not in deciding if print is ready to run. Only the other two non DNI activities will be interrogated.

**Update Cost Center Definitions**

Cancel | Save Changes

Select Cost Center:  Department:  Group:

Maximum Resource Use per Job

Operators Required per Resource

Percent of Standard

Setup Time in Hours

☒ Do NOT include in Ready to Run Decision

☒ Standard Processing  
☐ Load Activities as a Single Line when Scheduling  
☐ Load Components as a Single Line when Scheduling  
☐ This is the Lead/Skilled Operator Cost Center  
☐ This is the Assistant Operator Cost Center

Apply Shift Capacities from  to

**Apply Shift Capacities from** – Cost Center edits to be applied to a specific date range. This option is used, for example, if a machine was going to be down for maintenance.

Apply Shift Capacities from  to

**Standard Processing** – Loads jobs steps as they appear from the estimate.

☐ **Standard Processing**

**Load Activities as a Single Line when Scheduling** – All job steps the selected Cost Center will load as a single line with combined processing time and quantity.

☐ **Load Activities as a Single Line when Scheduling**

In the example below, activities for the PROGRAMMING Cost Center – ADDRESS STANDARDIZATION and BARCODE QUALIFY is loaded separately. Using option **Load Activities as a Single Line when Scheduling** will combine these processes together including Qty's and Processing Time.

0958 [ #10 May Insert ]

Settings and Controls | Work Ticket | Refresh Columns | Show WIP | Show Structure | Fit Columns | Estimated Job loaded for Scheduling

| Component      | Task             | Activity Code | Cost Center            | Promised Dtm | Schedule d Hours | Start DTM | End DTM | Estimate d Hours |
|----------------|------------------|---------------|------------------------|--------------|------------------|-----------|---------|------------------|
|                | ADDRESS STA...   | 34036         | PROGRAMMING [01-0...   |              |                  |           |         | 0.2              |
|                | BARCODE QU...    | 34038         | PROGRAMMING [01-0...   |              |                  |           |         | 2                |
| #10            | INKJET UP TO ... | 81011         | INKJET [01-0100 cod... |              |                  |           |         | 4.333            |
| Letter         | FOLD 8.5x11/...  | 74011         | FOLDER [01-0100 cod... |              |                  |           |         | 4.167            |
| Coupon(Common) | FOLD 8.5x11/...  | 74011         | FOLDER [01-0100 cod... |              |                  |           |         | 0.1              |
| Coupon(Green)  | FOLD 8.5x11/...  | 74011         | FOLDER [01-0100 cod... |              |                  |           |         | 3.958            |
| Coupon(Blue)   | FOLD 8.5x11/...  | 74011         | FOLDER [01-0100 cod... |              |                  |           |         | 3.958            |
|                | INSERT, METE...  | 83012         | INSERTER [01-0100 c... |              |                  |           |         | 8.567            |

Unscheduled  
5/9/2013, Quantity:30000  
Load  
Select an Existing or New Route  
(new)  
☐ Combine Identical Activities  
☐ Promised Dates ☐ Scheduled Dates  
Options and Restore Steps Hold  
Schedule  
Start Scheduling at:  
5/23/2013 7:00:00 AM  
☐ Force Schedule to Complete by:  
8/20/2013 11:00:00 PM

Update Cost Center Definitions

Cancel Save Changes

Select Cost Center  
PROGRAMMING [01-0100 code:340]

Department  
DATA PROCESSING

Group  
Art

Available Shift Definitions

| Descr.         | Valid Day | Shift | Start Time |
|----------------|-----------|-------|------------|
| Night          | Any Day   | 1     | 12:00 AM   |
| Day            | Any Day   | 2     | 8:00 AM    |
| Swing          | Any Day   | 3     | 4:00 PM    |
| Saturday Shift | Saturday  | 4     | 8:00 AM    |

Maximum Resource Use per Job 2  
Operators Required per Resource 0  
Percent of Standard 100  
Setup Time in Hours 2  
☒ Do NOT include in Ready to Run Decision

Standard Processing  
☒ Load Activities as a Single Line when Scheduling  
Load Components as a Single Line when Scheduling  
This is the Lead/Skilled Operator Cost Center  
This is the Assistant Operator Cost Center

Apply Shift Capacities from 5/23/2013 to 4/19/2015

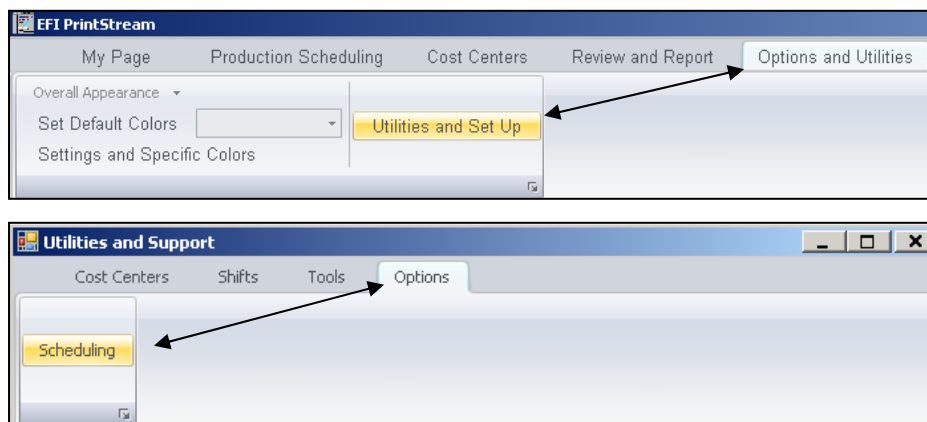
**Note** Activities are loaded into a single line for the Programming Cost Center with combined processing time and quantity.

| Component   | Task                  | Activity Code | Cost Center             | Promised Dtm | Scheduled Hours | Start DTM | End DTM | Qty   | U s | Estimated Hours |
|-------------|-----------------------|---------------|-------------------------|--------------|-----------------|-----------|---------|-------|-----|-----------------|
|             | Prep                  | 34036         | PROGRAMMING [01-01...   |              |                 |           |         | 60000 | 0   | 2.2             |
| #10         | INKJET UP TO 6x9 E... | 81011         | INKJET [01-0100 cod:... |              |                 |           |         | 30000 | 0   | 4.333           |
| Letter      | FOLD 8.5x11/14 SIZE   | 74011         | FOLDER [01-0100 cod...  |              |                 |           |         | 30000 | 0   | 4.167           |
| Coupon(C... | FOLD 8.5x11/14 SIZE   | 74011         | FOLDER [01-0100 cod...  |              |                 |           |         | 60000 | 0   | 0.1             |
| Coupon(G... | FOLD 8.5x11/14 SIZE   | 74011         | FOLDER [01-0100 cod...  |              |                 |           |         | 30000 | 0   | 3.958           |
| Coupon(B... | FOLD 8.5x11/14 SIZE   | 74011         | FOLDER [01-0100 cod...  |              |                 |           |         | 30000 | 0   | 3.958           |
|             | INSERT, METER, SO...  | 83012         | INSERTER [01-0100 co... |              |                 |           |         | 30000 | 0   | 8.567           |

### To define Task Descriptions

Users can define Task Description for each of the three groupings when using option **(Load Activities as a Single Line when Scheduling)**.

1. Select **Options and Utilities > Utilities and Set Up > Options > Scheduling**.



2. Enter a naming convention for each of the groups.

**System Wide Scheduling Options**

☐ Allow Job Delivery Date Update

☐ Send Email when Route Completion Conflicts with Job Delivery Date

☐ Require Status Code when Route Completion Date Changes

Pre-Press Combined Tasks Name :

Press/Component Combined Tasks Name :

Finish/Bind Combined Tasks Name :



3. Select **Update** to save changes.

System Wide Scheduling Options

☐ Allow Job Delivery Date Update

☐ Send Email when Route Completion Conflicts with Job Delivery Date

☐ Require Status Code when Route Completion Date Changes

Pre-Press Combined Tasks Name :

Pre Press - DP

Press/Component Combined Tasks Name :

Print

Finish/Bind Combined Tasks Name :

Finish

Done

Update

|   | Component     | Task                       | Activity Code | Cost Center                   | Promised Dtm | Qty   | Use | Estimated Hours |
|---|---------------|----------------------------|---------------|-------------------------------|--------------|-------|-----|-----------------|
| > |               | Pre Press - DP             | 34036         | PROGRAMMING [01-0100 code:... |              | 60000 | 0   | 2.2             |
|   | #10           | INKJET UP TO 6x9 ENVELOPE  | 81011         | INKJET [01-0100 code:810]     |              | 30000 | 0   | 4.333           |
|   | Letter        | FOLD 8.5x11/14 SIZE        | 74011         | FOLDER [01-0100 code:740]     |              | 30000 | 0   | 4.167           |
|   | Coupon(Com... | FOLD 8.5x11/14 SIZE        | 74011         | FOLDER [01-0100 code:740]     |              | 60000 | 0   | 0.1             |
|   | Coupon(Green) | FOLD 8.5x11/14 SIZE        | 74011         | FOLDER [01-0100 code:740]     |              | 30000 | 0   | 3.958           |
|   | Coupon(Blue)  | FOLD 8.5x11/14 SIZE        | 74011         | FOLDER [01-0100 code:740]     |              | 30000 | 0   | 3.958           |
|   |               | INSERT, METER, SORT #10... | 83012         | INSERTER [01-0100 code:830]   |              | 30000 | 0   | 8.567           |

- Red – Pre-Press and Data Processing activities
- Green – Component specific activities
- Blue – Finishing and Bindery activities

## Rules behind Job Step Order Loading and Scheduling

When you create Cost Centers, you are required to give these Cost Centers a **Production Grouping**.

This grouping will load the job step in the prep (red) section if it is **Art**, **Film**, or **Plates**, in the print (green) section if it is **Print**, and in the blue (finishing) section if it is **finishing**.

The exception to the above rule is job steps linked to finishing Cost Centers that are print component or section finishing processes. These job steps will be loaded into the print (green) section in sequence with the printed components to which they are linked.

Within this grouping order, job steps follow the activity code sort order. (Sort order can now be added to print activities in **Master File Reports > System Maintenance > Populate Sort Order for Activities**).

All prep (red) job steps must find available Cost Center capacity before print (green) job steps can start. All print (green) job steps must find available Cost Center capacity before finishing (blue) job steps can start.

Job steps that are side by side are considered **Blocks**. These schedule sequentially, i.e., the first step must be scheduled before the second step can start. These **Blocks** and all solo job steps (i.e., blank spaces between one step and the next) can all begin simultaneously, assuming there is available Cost Center capacity.

**Art – Data Processing/Pre-Press**

**Printing – Component Processes**

**Finishing - Finishing and Bindery activities**

Load Components to a Single Line When Scheduling – Not available

## Labor Pools – Cost Plus Markup (Print) Activity Codes

This will create a restriction on scheduling, i.e., resources must be available in both the machine Cost Center and the operator Cost Center in order to schedule the job step.

- ☐ This is the Lead/Skilled Operator Cost Center
- ☐ This is the Assistant Operator Cost Center

Cost Centers can be created solely to define labor resources per shift/day. These labor pools are available to all activities within the same **Printstream Production Department**.

You can create pools of operators per department which must be available to schedule along with your machine Cost Centers. Use this control when you need to schedule both operators and machines to get the work done. You can set up one labor pool for a department, or a lead and an assistant labor pool. Activity codes that require more than one operator will pull the first from the lead pool, and the rest from the assistant pool if there is one.

### Labor Pool Setup and Use

1. Open **Master Files Reports**.
2. Create one or two new Cost Centers for each production department which needs labor pools for scheduling.
3. Be sure to give these Cost Centers hourly and weekly capacity and identify how many people are available each shift. This capacity detail can be edited in **MR Extended > Options and Utilities > Utilities and Set up > Setup and Capacities per Shift**.

The screenshot shows the 'Production Cost Centers' window. On the left is a tree view of cost centers, including 300\*DP ADMIN, 310\*LIST PURCHASING, 320\*DATA ENTRY, 340\*PROGRAMMING, 360\*OUTPUT DATA, 361\*HGW Data Processing, 4\*PREPRESS, 405\*ART/COMPOSITION, 420\*PROOFING, 425\*PLATE MAKING, 430\*ELEC. PREPRESS, 5\*PRINTING, 500\*PRINT ADMIN, 510\*PRINT BUYOUTS, 512\*KEIKON, 515\*ITEK, 520\*240 HEIDELBERG, 525\*640 HEIDELBERG, 530\*DIDDE 6, 535\*SUBURBAN, 540\*10 CLR SANDEN 28/22/17", 545\*Printing Lead Operators (selected), 546\*Printing Assistant Operators, 580\*MBO FOLDER (PRESS), 590\*CUTTER (PRESS), 6\*LASER, 582\*DMM Finite Folder, and 600\*LASER ADMIN. On the right, the configuration for '545\*Printing Lead Operators' is shown:

|                                                                              |                          |
|------------------------------------------------------------------------------|--------------------------|
| Company Code                                                                 | 01                       |
| Company Name                                                                 | Streamline Solutions     |
| Plant Code                                                                   | 0100                     |
| Plant Name                                                                   | 01 San Rafael            |
| Prod Dpt Code                                                                | 5                        |
| Prod Dpt Name                                                                | PRINTING                 |
| Production Grouping                                                          | Printing                 |
| Cost Center Code                                                             | 545                      |
| Short Code                                                                   | LeadOp                   |
| Cost Center Name                                                             | Printing Lead Operators  |
| Process Wait Time                                                            | 0                        |
| Hourly Capacity                                                              | 24                       |
| Days of the Week                                                             | 5                        |
| Number of Machines                                                           | 5                        |
| Standard % of 'Down' Time                                                    | 0 %                      |
| Prepayment Hold Does NOT prevent from using Activities from this Cost Center | <input type="checkbox"/> |
| Releasing SO.....                                                            |                          |

4. After saving your new Cost Centers, open **MR Util** and run **Reformat Masters after Cost Center Change**. This will import the new Cost Centers into the **MR Extended** and **Shop Floor** databases.

5. Select the check box designating this Cost Center as a labor pool. Select **Lead/Skilled** if you are setting up only one labor pool for the department.

**Note** Once a **Lead** labor pool has been created, your second Cost Center (per department) can only be designated as an **Assistant** labor pool.

**Operators required per Resource** – In the example below, 1 operator is entered meaning this labor pool will use one lead in the pool of 5 when writing a job schedule.

**Update Cost Center Definitions**

Cancel Save Changes

Select Cost Center: Printing Lead Operators [01-0100 code:545]

Department: PRINTING Group: Printing

Maximum Resource Use per Job: 1

Operators Required per Resource: 0

Percent of Standard: 100

Setup Time in Hours: 0

☐ Do NOT include in Ready to Run Decision

Apply Shift Capacities from: 8/1/2013 to 4/19/2015

Available Shift Definitions:

| Descr.         | Valid Day | Shift | Start Time |
|----------------|-----------|-------|------------|
| Night          | Any Day   | 1     | 12:00 AM   |
| Day            | Any Day   | 2     | 8:00 AM    |
| Swing          | Any Day   | 3     | 4:00 PM    |
| Saturday Shift | Saturday  | 4     | 8:00 AM    |

Standard Processing  
Load Activities as a Single Line when Scheduling  
Load Components as a Single Line when Scheduling  
☒ This is the Lead/Skilled Operator Cost Center  
☐ This is the Assistant Operator Cost Center

| Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Sunday    | 1            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 0         | 0         | Sunday    | 2            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Sunday    | 3            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Monday    | 4            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 5         | 5         | Monday    | 5            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Monday    | 6            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Tuesday   | 7            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 5         | 5         | Tuesday   | 8            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Tuesday   | 9            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Wednesday | 10           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 5         | 5         | Wednesday | 11           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Wednesday | 12           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Thursday  | 13           | 1            |

**Assistances Cost Center** -Will use two assistance operators out of the pool of 10.

**Update Cost Center Definitions**

Cancel Save Changes

Select Cost Center: Printing Assistant Operators [01-0100 code:546]

Department: PRINTING Group: Printing

Maximum Resource Use per Job: 1

Operators Required per Resource: 0

Percent of Standard: 100

Setup Time in Hours: 0

☐ Do NOT include in Ready to Run Decision

Apply Shift Capacities from: 8/1/2013 to 4/19/2015

Available Shift Definitions:

| Descr.         | Valid Day | Shift | Start Time |
|----------------|-----------|-------|------------|
| Night          | Any Day   | 1     | 12:00 AM   |
| Day            | Any Day   | 2     | 8:00 AM    |
| Swing          | Any Day   | 3     | 4:00 PM    |
| Saturday Shift | Saturday  | 4     | 8:00 AM    |

Standard Processing  
Load Activities as a Single Line when Scheduling  
Load Components as a Single Line when Scheduling  
☐ This is the Lead/Skilled Operator Cost Center  
☒ This is the Assistant Operator Cost Center

| Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Sunday    | 1            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 0         | 0         | Sunday    | 2            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Sunday    | 3            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 10        | 10        | Monday    | 4            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 10        | 10        | Monday    | 5            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 10        | 10        | Monday    | 6            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 10        | 10        | Tuesday   | 7            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 10        | 10        | Tuesday   | 8            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 10        | 10        | Tuesday   | 9            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 10        | 10        | Wednesday | 10           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 10        | 10        | Wednesday | 11           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 10        | 10        | Wednesday | 12           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 10        | 10        | Thursday  | 13           | 1            |

In the example below, the 640 Heidelberg has 1 resource, however, requires 3 operators.

Update Cost Center Definitions

CancelSave Changes

Select Cost Center640 HEIDELBERG [01-0100 code:525]

DepartmentPRINTING

GroupPrinting

Maximum Resource Use per Job1

Operators Required per Resource3

Percent of Standard100

Setup Time in Hours0

☐ Do NOT include in Ready to Run Decision

☒ Standard Processing

☐ Load Activities as a Single Line when Scheduling

☐ Load Components as a Single Line when Scheduling

☐ This is the Lead/Skilled Operator Cost Center

☐ This is the Assistant Operator Cost Center

Apply Shift Capacities from8/1/2013to4/19/2015

| Descr.         | Valid Day | Shift | Start Time |
|----------------|-----------|-------|------------|
| Night          | Any Day   | 1     | 12:00 AM   |
| Day            | Any Day   | 2     | 8:00 AM    |
| Swing          | Any Day   | 3     | 4:00 PM    |
| Saturday Shift | Saturday  | 4     | 8:00 AM    |

| Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Sunday    | 1            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 0         | 0         | Sunday    | 2            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Sunday    | 3            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Monday    | 4            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 1         | 1         | Monday    | 5            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Monday    | 6            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Tuesday   | 7            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 1         | 1         | Tuesday   | 8            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Tuesday   | 9            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Wednesday | 10           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 1         | 1         | Wednesday | 11           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Wednesday | 12           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Thursday  | 13           | 1            |

Notice when a job gets scheduled, the system uses 1 lead and 2 assistances from the pool.

Resource Loading View

Days Displayed3Refresh2013

|                                                | Night | 8/20 Day | Swing | Night | 8/21 Day | Swing | Night | 8/22 Day | Swing |
|------------------------------------------------|-------|----------|-------|-------|----------|-------|-------|----------|-------|
| 640 HEIDELBERG [01-0100 code:525]              |       |          |       |       |          |       |       |          |       |
| Printing Lead Operators [01-0100 code:54]      |       |          |       |       |          |       |       |          |       |
| Printing Assistant Operators [01-0100 code:55] |       |          |       |       |          |       |       |          |       |

640 HEIDELBERG [01-0100 code:525]

This is based on processing time; 2.5hrs from the Lead Pool and 5 hours from the Assistance Pool because Cost Center requires 3 operators. System always schedules 1 as Lead the remaining will be from the Assistance pool.

| August Postcards loaded with an ending date-time of 8/20/2013 12:35:59 PM and a Drop Date of 8/20/2013 |           |               |             |                    |              |           |                 |            |            |                 |           |          |         |
|--------------------------------------------------------------------------------------------------------|-----------|---------------|-------------|--------------------|--------------|-----------|-----------------|------------|------------|-----------------|-----------|----------|---------|
|                                                                                                        | Component | Activity Code | Task        | Cost Center        | Promised Dtm | Operators | Estimated Hours | Lead Hours | Asst Hours | Scheduled Hours | Start DTM | End DTM  | Release |
| >                                                                                                      | August... | 42510         | Platemaking | PLATEMAKING [...]  |              | 0         | 2               |            |            | 2               | 8/20/...  | 8/20/... | 8       |
|                                                                                                        | August... | 50000         | Paper Stock | PRINT ADMIN [0...] |              | 0         | 0.1             |            |            | 0.1             | 8/20/...  | 8/20/... |         |
|                                                                                                        | August... | 52519         | Printing    | 640 HEIDELBER...   |              | 3         | 2.5             | 2.5        | 5          | 2.5             | 8/20/...  | 8/20/... |         |



**Labor Pools - Pricelist (Mail) Activity Codes** - Labor requirements are set up per activity for price list (mail) activity codes.

1. Create Labor Cost Centers.
2. Enter Hourly Capacity, Days of the Week, and number of Machines. Make sure to open and run **MR Utility – Reformat Cost Center after Change**.

**Production Cost Centers**

Company Code: 01  
 Company Name: Streamline Solutions  
 Plant Code: 0100  
 Plant Name: 01 San Rafael  
 Prod Dpt Code: 8  
 Prod Dpt Name: MAILING  
 Production Grouping: Finishing  
 Cost Center Code: 834  
 Short Code: DMMOPS  
 Cost Center Name: Operators - Mailing Dept  
 Process Wait Time: 0  
 Hourly Capacity: 8  
 Days of the Week: 5  
 Number of Machines: 5  
 Standard % of 'Down' Time: 0 %  
 Prepayment Hold Does NOT prevent from using Activities from this Cost Center: ☐  
 Releasing SO: .....

3. Select the check box designating this Cost Center as a labor pool. Select **Lead/Skilled** if you are setting up only one labor pool for the department.

**Update Cost Center Definitions**

Cancel Save Changes

Select Cost Center: Operators - Mailing Dept [01-0100 code:834]  
 Department: MAILING  
 Group: Finishing

Maximum Resource Use per Job: 1  
 Operators Required per Resource: 0  
 Percent of Standard: 100  
 Setup Time in Hours: 0  
☐ Do NOT include in Ready to Run Decision

Standard Processing  
☐ Load Activities as a Single Line when Scheduling  
☐ Load Components as a Single Line when Scheduling  
☒ This is the Lead/Skilled Operator Cost Center  
☐ This is the Assistant Operator Cost Center

Apply Shift Capacities from: 8/1/2013 to: 4/19/2015

| Descr.         | Valid Day | Shift | Start Time |
|----------------|-----------|-------|------------|
| Night          | Any Day   | 1     | 12:00 AM   |
| Day            | Any Day   | 2     | 8:00 AM    |
| Swing          | Any Day   | 3     | 4:00 PM    |
| Saturday Shift | Saturday  | 4     | 8:00 AM    |

| Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Sunday    | 1            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 0         | 0         | Sunday    | 2            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Sunday    | 3            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Monday    | 4            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 5         | 5         | Monday    | 5            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Monday    | 6            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Tuesday   | 7            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 5         | 5         | Tuesday   | 8            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Tuesday   | 9            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Wednesday | 10           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 5         | 5         | Wednesday | 11           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Wednesday | 12           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Thursday  | 13           | 1            |

**Update Cost Center Definitions**

Cancel Save Changes

Select Cost Center: Assistants - Mailing Dept [01-0100 code:835]

Department: MAILING Group: Finishing

Maximum Resource Use per Job: 10

Operators Required per Resource: 0

Percent of Standard: 100

Setup Time in Hours: 0

☐ Do NOT include In Ready to Run Decision

☐ Standard Processing

☐ Load Activities as a Single Line when Scheduling

☐ Load Components as a Single Line when Scheduling

☐ This is the Lead/Skilled Operator Cost Center

☒ This is the Assistant Operator Cost Center

Available Shift Definitions

| Descr.         | Valid Day | Shift | Start Time |
|----------------|-----------|-------|------------|
| Night          | Any Day   | 1     | 12:00 AM   |
| Day            | Any Day   | 2     | 8:00 AM    |
| Swing          | Any Day   | 3     | 4:00 PM    |
| Saturday Shift | Saturday  | 4     | 8:00 AM    |

Apply Shift Capacities from: 8/1/2013 to 4/19/2015

| Selected Shift | Start Time | End Time | Available | Scheduled | Day       | Weekly Shift | Chrono Shift |
|----------------|------------|----------|-----------|-----------|-----------|--------------|--------------|
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Sunday    | 1            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 10        | 0         | Sunday    | 2            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Sunday    | 3            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Monday    | 4            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 10        | 10        | Monday    | 5            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Monday    | 6            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Tuesday   | 7            | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 10        | 10        | Tuesday   | 8            | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Tuesday   | 9            | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Wednesday | 10           | 1            |
| Day            | 8:00 AM    | 3:59 PM  | 10        | 10        | Wednesday | 11           | 2            |
| Swing          | 4:00 PM    | 11:59 PM | 0         | 0         | Wednesday | 12           | 3            |
| Night          | 12:00 AM   | 7:59 AM  | 0         | 0         | Thursday  | 13           | 1            |

4. Define labor requirements per activity code for mail activities in **Master Files Mail Process > Create Batch of Processes for Selected Menu Item.**

**Master Files Mail**

File View Forms Miscellaneous Reports Window Help

**0100 Master Files Mail**

TREE\_MENU

- Data Processing
- Components
  - Laser
  - Inkjet
    - INKJET
    - INKJET UP TO 6x9 ENVELOPE
    - INKJET 9x12 ENVELOPE
    - INKJET ONTO MAGAZINE

**Maintain Processes**

| Description | Activity Links | Pricing         | Process Standards   |             |        |        |        |        |            |        |
|-------------|----------------|-----------------|---------------------|-------------|--------|--------|--------|--------|------------|--------|
| Short Code  | Plant Code     | Make Ready Mins | Number of Operators | Default Qty | Qty1   | Speed1 | Qty2   | Speed2 | Qty3       | Speed3 |
| 1 6x9       | 0100           | 0.00            | 2.00                | 0           | 10,000 | 7,000  | 25,000 | 8,000  | 99,999,999 | 9.00   |
| 2 9x12      | 0100           | 0.00            | 2.00                | 0           | 10,000 | 6,000  | 25,000 | 7,000  | 99,999,999 | 8.00   |
| 3 MAG       | 0100           | 0.00            | 3.00                | 0           | 10,000 | 2,000  | 25,000 | 2,500  | 99,999,999 | 3.00   |
| 4           |                |                 |                     |             |        |        |        |        |            |        |
| 5           |                |                 |                     |             |        |        |        |        |            |        |

5. Operator requirements can be added or edited in estimating; select the dollar sign button to access these standards in an estimate.

**Mail Estimating for the Company: (01) Streamline Solutions - (0100) 01 San Rafael LS - (Form#: 1 August Catalog-25,000)**

File Window Changes Plant(s) for Quote Refresh Master Data Help

Print Mode Is Off

**Mail Estimating (Print & Estimate)**

Quote Header

Estimating

- Data Processing
- Components
  - Assemblies/Bindery
  - Create Inventory
  - Packages Advanced
  - Kits And Packages
  - Finishing
  - Drops
  - Special Instructions
- Credit Checks and Pricing
- Job Scheduling and Scheduling

Description: August Catalog Versions: 1 POD: Source: Quantity before Overs: 25,000

Date on Hand: List... New... Waste: 0

Item # From: Pricing Details - INKJET ONTO MAGAZINE (Selection Only)

Calculation Base Quantity: 25,000

**Standard Run Speed**

| Standard             | Override | Lock  |
|----------------------|----------|-------|
| Make Ready (Hours)   | 0.00     | 0.00  |
| Run Speed (per Hour) | 2.500    | 2.500 |
| Run Time (Hours)     | 10.00    | 10.00 |
| Number of Workers    | 3.00     | 3.00  |

**Standard Pricing**

| Standard       | Override  | Lock      |
|----------------|-----------|-----------|
| Setup          | \$0.00    | \$0.00    |
| Minimum charge | \$0.00    | \$0.00    |
| Rate per 1000  | \$20.2500 | \$20.2500 |
| Total          | \$506.25  | \$506.25  |

Book Price/Rate Lock Rate Markup (%) Lock Quoted Rate MU Extended Price Lock QP

Qty Lock Cycle Base d Quoted Price All Pkgs Sort Order Take Component Cost/Price Add on Int'l

\$506.25 N P 8180

Cancel Save

6. When scheduling INKJET ONTO MAGAZINE, resources will be required from the labor pools for every 1 resource required from the Inkjet Cost Center.

|                                                                         |               |                  |                |                  |                 |                    |                     |               |               |                     |              |              |                                                          |  |
|-------------------------------------------------------------------------|---------------|------------------|----------------|------------------|-----------------|--------------------|---------------------|---------------|---------------|---------------------|--------------|--------------|----------------------------------------------------------|--|
| Work Ticket   Refresh Columns   Show WIP   Show Structure   Fit Columns |               |                  |                |                  |                 |                    |                     |               |               |                     |              |              | End date : 8/2/2013 10:00:00 AM - Successfully Scheduled |  |
|                                                                         | Compo<br>nent | Activity<br>Code | Task           | Cost Center      | Promised<br>Dtm | Operator<br>s Reqd | Estimate<br>d Hours | Lead<br>Hours | Asst<br>Hours | Schedule<br>d Hours | Start<br>DTM | End DTM      |                                                          |  |
| >                                                                       | August...     | 81013            | INKJET ONTO... | INKJET [01-01... |                 | 3                  | 10                  | 10            | 20            | 10                  | 8/1/201...   | 8/2/2013 ... | 2...                                                     |  |

## Cost Center Resources – View

**Cost Center Resources**

Select / Refresh Choose settings and press Select / Refresh

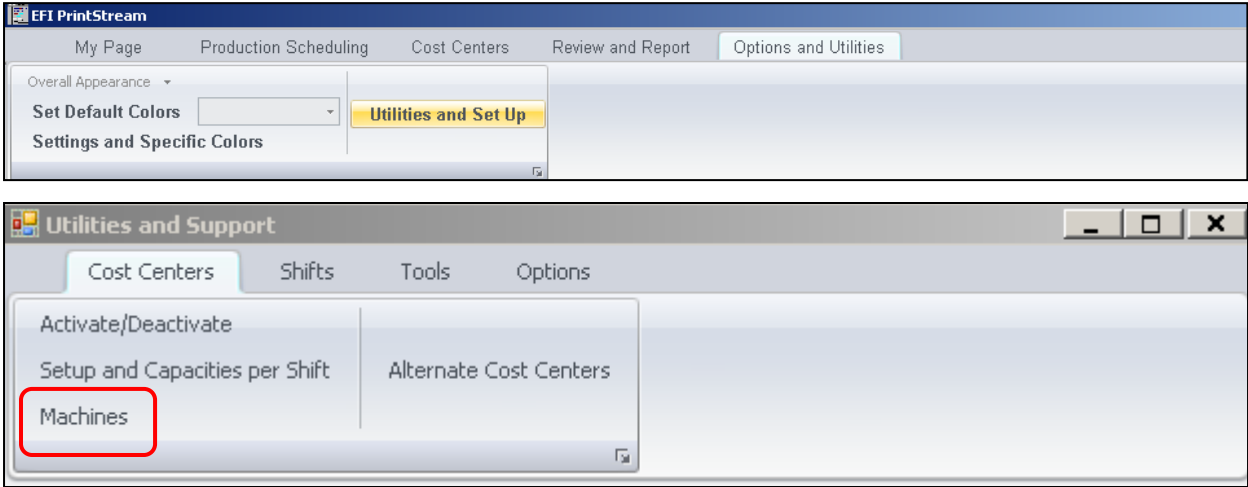
Start Date 8/1/2013 Days Displayed 5 InkJet Labor All Cost Centers

| 2013                                         | Night | 8/1 Day | Swing | Night | 8/2 Day | Swing | Night | 8/3 Day | Swing | Night | 8/4 Day | Swing | Night | 8/5 Day | Swing |
|----------------------------------------------|-------|---------|-------|-------|---------|-------|-------|---------|-------|-------|---------|-------|-------|---------|-------|
| InkJET [01-0100 code:810]                    |       |         |       |       |         |       |       |         |       |       |         |       |       |         |       |
| Operators - Mailing Dept [01-0100 code:830]  |       |         |       |       |         |       |       |         |       |       |         |       |       |         |       |
| Assistants - Mailing Dept [01-0100 code:840] |       |         |       |       |         |       |       |         |       |       |         |       |       |         |       |

# Cost Center Machines

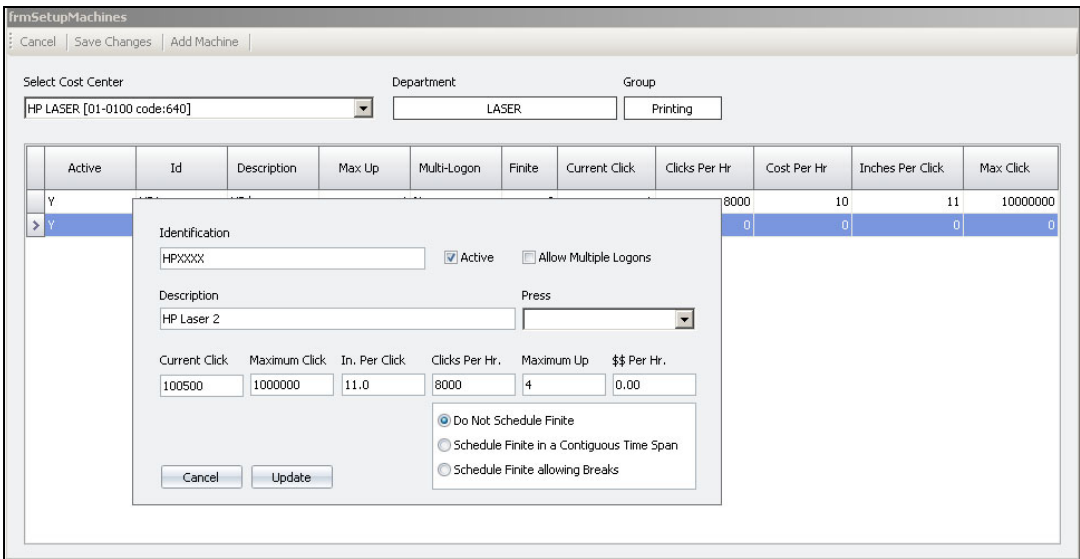
Machines are entered per Cost Center. Cost Centers can have one or multiple machines. Any activity in the Cost Center that collects machine data can accept records against one of the Cost Center's machines.

A Cost Center machine must first be defined in **Options and Utilities > Utilities and Setup>Cost Centers>Machines**.



## To create a machine

- 1. Select the Cost Center from the drop-down display.
- 2. Select **Add Machine**.
- 3. Enter machine **Identification** and **Description**. Both will display in MR Shop Floor. **Description** can be edited; **Identification** cannot.
- 4. Enter **Maximum Number Up**. This restricts users from entering a larger number up than the machine can process.
- 5. Click **Save Changes** to complete the machine setup.



### Active

Once the Machines are entered, they are automatically active and display for selection. They can be deactivated by clearing the **Active** check box.

### Press

When a printing Cost Center is selected to create a machine, the **Press** box displays a list of all presses set-up in master files print. **Identification** and **Description** can be associated with a specific Press.

Presses are defined in other setups with associated activities. This is to allow for a specific machine to be tied to that definition.

### Allow Multiple Logons

The intent of this option is to permit multiple activities to be logged onto a single machine (without ganging). Previously, a user was not allowed to log onto a machine that was already in use. The only exception was if the employee was set up with ganging privileges. In that case, they were asked if they were ganging with the other activity. The answer **Yes** allowed them to log on as a ganged activity. If the answer was **No**, then they were again not given the ability to log on.

There are situations where an employee is working on two activities at the same time on a single machine, but without ganging. For example, they may be finishing addressing on Job #123, and start the setup of another job #456. However, the employee privilege functioning for **One at a Time** must be maintained. This new option allows the multiple logons to be controlled at a machine level on top of the employee privilege level.

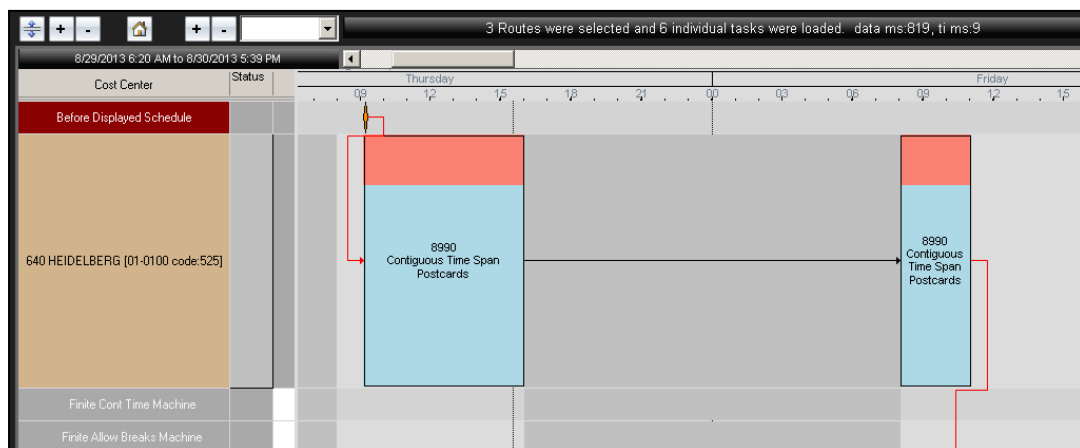
### Do not Schedule Finite

Normal scheduling of jobs recognizing shifts, jobs will be scheduled based on shift set up and available capacity. If a job does not complete on one day it will be schedule for the next shift with available capacity.

### Schedule Finite in a Contiguous Time Span

This option is designed for machines that will produce a job in a contiguous span. These machines could require much set-up time and to be efficient a job needs to start and complete without any breaks within the day. For example, two 8 hours shifts and a job that requires 12 hours to produce. With this option set, the job would only be scheduled where there is capacity containing 12 hours. This would span across multiple shifts but not days.

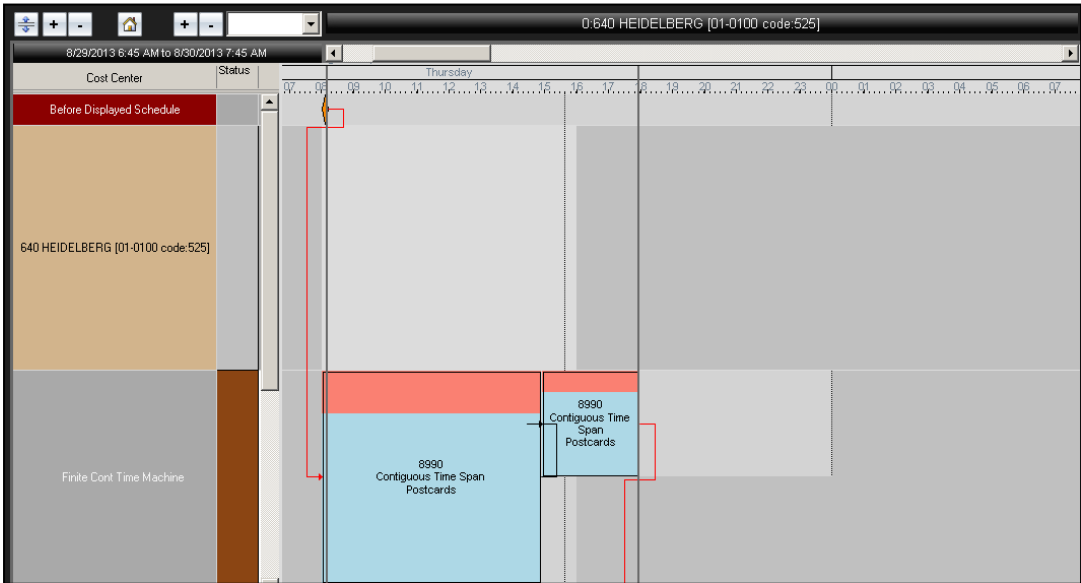
In the example below, job #8990 has been scheduled. It starts on Thursday and completes Friday. This is a job that needs to start and complete in a contiguous span.



Opened Cost Center job list> set Start Date and Time >Save.

| Cost Center Machine/Resource Task Priorities |      |           |     |            |          |                                                                            |         |           |         |           |             |           |           |                |            |         |                |     |         |
|----------------------------------------------|------|-----------|-----|------------|----------|----------------------------------------------------------------------------|---------|-----------|---------|-----------|-------------|-----------|-----------|----------------|------------|---------|----------------|-----|---------|
| Save Cancel Clear                            |      |           |     |            |          |                                                                            |         |           |         |           |             |           |           |                |            |         |                |     |         |
| Start At:                                    |      | 8/29/2013 |     | 8:00:00 AM |          | Prioritize : Finite Cont Time Machine in 640 HEIDELBERG [01-0100 code:525] |         |           |         |           |             |           |           |                |            |         |                |     |         |
| Pri                                          | Read | Job Num   | Mac | Route Drop | Activity | Route Descr                                                                | Machine | Proc esse | Act ual | Rem ainin | Custom er   | Proc esse | Rem ainin | Job Descr      | Comp onent | Stat us | Activity Descr | R o | Job Not |
| 1                                            |      | 8990      |     | 8/30/2013  | 52519    | Route 1, Co...                                                             |         | 0         | 10      | 1168      | Claude's... | 0         | 10        | Contiguous ... | Postca...  | (none)  | Printing       | 1   |         |

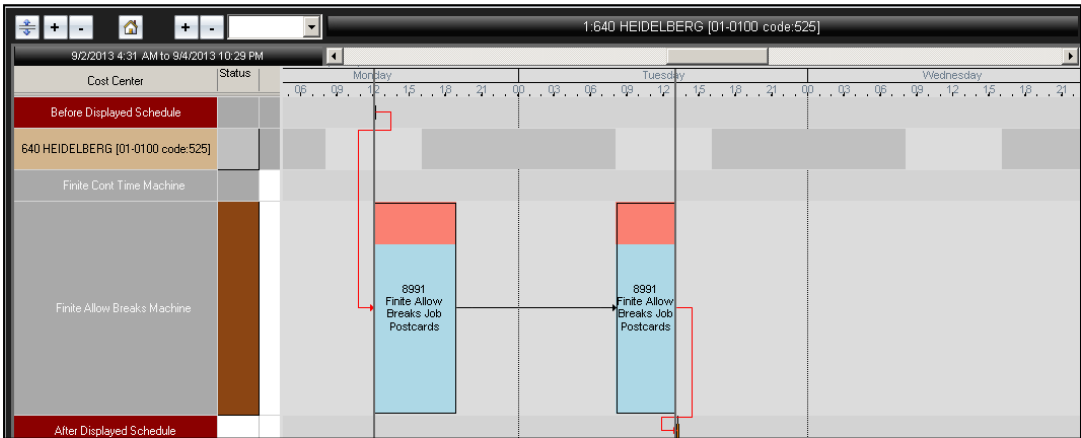
Notice the job will now start on shift 1 and complete on shift 2 in a contiguous span.



Schedule Finite allowing Breaks

This option is designed for machines that can start a job and complete on the next day or shift. These machines do not require a lot of set-up and mainly turn off at the end of a day and turn on the next day allowing a break within a day. When scheduling a job, the system will for look for available capacity and schedule accordingly.

In the example below, job #8991 is scheduled to start at 12:00pm (12 Hours), and because it is NOT a contiguous machine, it will finish the next day - a break. *If this job was scheduled on a machine marked contiguous, the system would look for the next available 12 hours within a single day.*



Additional entry fields listed below in the machine setup window are designed to collect data unique to laser printing. Production counts are recorded as the number of 'clicks' used. To activate this function, additional fields must be filled out when creating the machine.

**Current Click**

The starting click count on the machine. This will update as employees record additional clicks in MR Shop Floor.

**Maximum Click**

The maximum number of clicks that can be recorded against this machine. MR Shop Floor will not accept entries above the **Maximum Click**.

**Inches per Click**

Describes how many inches are lasered before one click is used.

**Clicks per Hour**

Number of clicks the machine can do in an hour.

To record production counts using click counts, employees enter the ending click count, the number up and the form length. Starting click count is subtracted from ending click count to calculate the number of clicks. The form length entered is divided by **Inches per Click** to determine what production count is created for the specific piece size by the number of clicks used. If the item was run multiple up, the production count is multiplied by the number up. If the piece was printed on both sides, the production count is divided in half.

Or the system can automatically read click information from the location specified in **Specify Auto Click Parameter**.

$(\text{Current Click} - \text{Start Click}) \div (\text{Form Length} / \text{Inches per Click}) \times \text{number up}$

$(\text{Divided by } 2 \text{ if duplex}) = \text{production count}$

**Maximum Number Up**

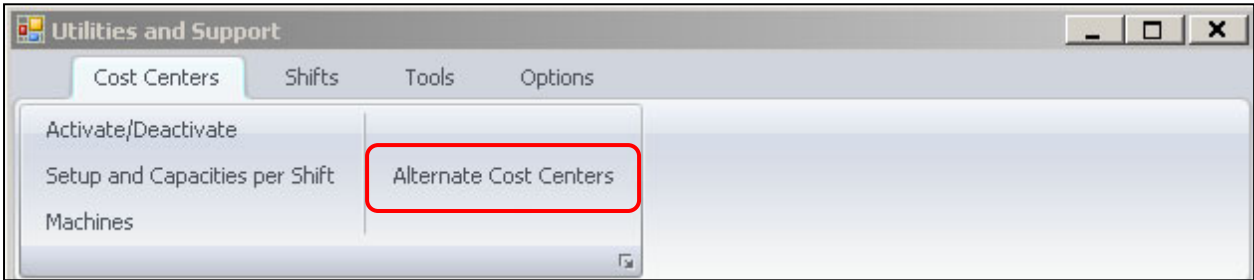
Restricts users from entering a larger number up than the machine can process.

**\$\$ Per Hour**

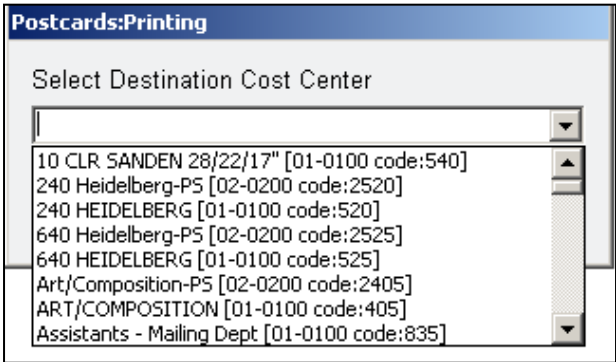
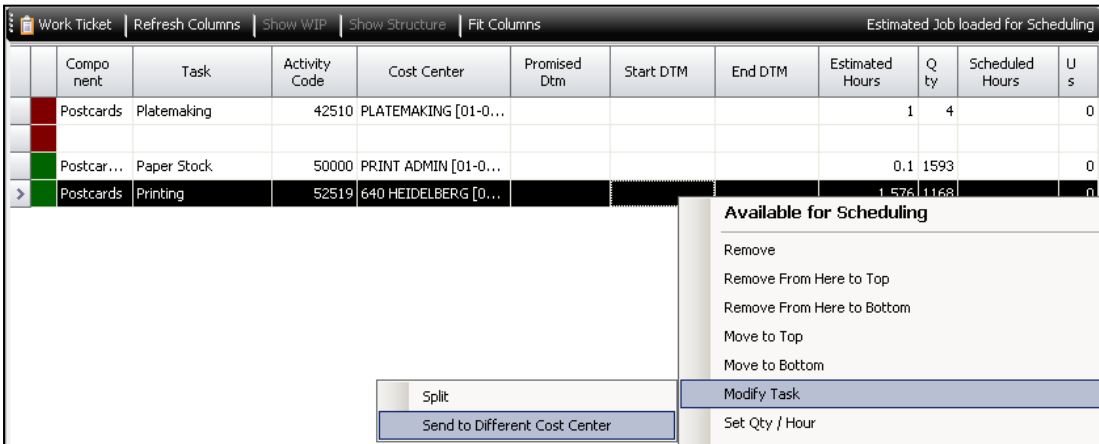
Informational field only; no reporting available.

# Cost Centers: Alternate Cost Centers

**Alternate Centers** – In programming process for MR Extended, can be set-up in MR Scheduler.



**Alternate Cost Centers** provides the Scheduler options that will allow a job step to be produced in different Cost Centers without editing the job. A job could be quoted on one piece of equipment, but due to conflicts in scheduling it could be produced in another Cost Center. This is a right-click option when scheduling a job and will be covered later in the document.





Postcards:Printing

Select Destination Activity

240 HEIDELBERG M/R  
240 HEIDELBERG RUN  
240 HEIDELBERG WASHUP  
240 HEIDELBERG MAINTENANCE

Ok

Cancel

Postcards:Printing

Select Destination Activity

240 HEIDELBERG RUN

Select a Press

240 Heidelberg, Inks:1  
240 Heidelberg, Inks:2  
240 Heidelberg, Inks:3  
240 Heidelberg, Inks:4  
240 Heidelberg, Inks:5  
240 Heidelberg, Inks:6

Postcards:Printing

Quantity to Send

1168

Ok

Cancel

Postcards:Printing

Validate your Choice

Send 1168 to 240 HEIDELBERG [01-0100 code:520]  
Activity:240 HEIDELBERG RUN  
Press:240 Heidelberg, Inks:4

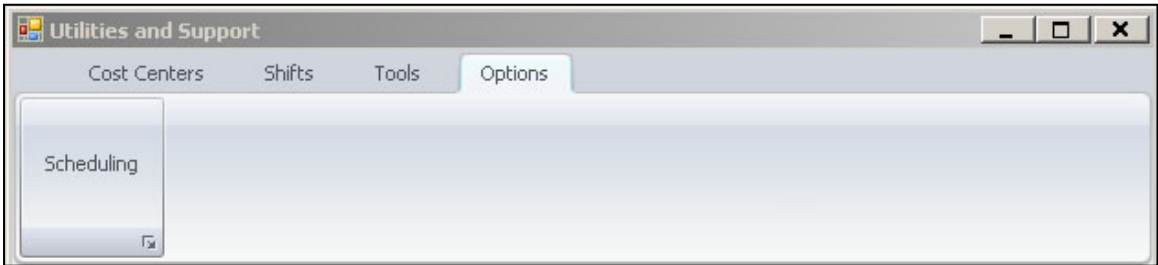
Ok

Cancel

| Work Ticket   Refresh Columns   Show WIP   Show Structure   Fit Columns |               |                    |                  |                      |                 |           |         |                    |         |                    |        |
|-------------------------------------------------------------------------|---------------|--------------------|------------------|----------------------|-----------------|-----------|---------|--------------------|---------|--------------------|--------|
| Estimated Job loaded for Scheduling                                     |               |                    |                  |                      |                 |           |         |                    |         |                    |        |
|                                                                         | Compo<br>nent | Task               | Activity<br>Code | Cost Center          | Promised<br>Dtm | Start DTM | End DTM | Estimated<br>Hours | Q<br>ty | Scheduled<br>Hours | U<br>s |
| >                                                                       | Postcards     | Platemaking        | 42510            | PLATEMAKING [01-0... |                 |           |         | 1                  | 4       |                    | 0      |
|                                                                         | Postcar...    | Paper Stock        | 50000            | PRINT ADMIN [01-0... |                 |           |         | 0.1                | 1593    |                    | 0      |
|                                                                         | Postcards     | 240 HEIDELBERG ... | 52015            | 240 HEIDELBERG [0... |                 |           |         | 1.576              | 1168    |                    | 0      |



# Options



Scheduling/System Wide Scheduling Options.

**System Wide Scheduling Options**

☒ Allow Job Delivery Date Update

☒ Send Email when Route Completion Conflicts with Job Delivery Date

☐ Require Status Code when Route Completion Date Changes

Pre-Press Combined Tasks Name :

Pre Press - DP

Press/Component Combined Tasks Name :

Print

Finish/Bind Combined Tasks Name :

Finish

Done

Update

## Allow Job Delivery Date Update

The Job Delivery date is initially set by the estimator, CSR or sales rep. If the **Allow Job Delivery Date Update** check box is selected, whenever a route is saved then the scheduler will be prompted to enter or adjust the route completion date and then the Job Delivery date.

This check box would likely **NOT** be selected if the customer tends to hold to their promised delivery dates (or wants to analyze if they are doing so). The Job Delivery date would usually not change, although the schedules might end up completing after it. This check box might be selected if delivery dates tend to change. It is common for mail jobs to get delayed due to delays in delivery of data, materials, or postage from the customer. In this case, the initial delivery date does not matter. The delivery date is potentially constantly changing. The scheduler would want to update this date so it can be compared to the schedule completion dates.

In the example below, the job has a **Last Mail Date** of 9/13/2013 that was entered at the time of job creation.

Customer #: 50093 Sub Acct FSC quote ☐

Customer: Claude's Test Customer Additional Info

Contact: Claude

Address: 156 Dartmouth Drive Phone: 415-462-7238

MADISON, AL 35757 FAX: 415-462-7238

Contact Phone: 415-462-7238

Quote Date: 9/13/2013 Default Section Size: 0 x 0

First Mail Date: 9/13/2013

Last Mail Date: 9/13/2013

Re-Contact Date: 9/27/2013

Re-Order Date: 9/13/2013

Qty: 25,000

SalesRep: Claude

CSR: House Account

Estimator: Betty White

Planner: The Planner

Source Code: Email

Job Type: Miscellaneous Quote is Package Price Based ☐

Job Title: Fall 2013 Mailing

Description:

Price List: Default Corporate Price List

Multi Inventory

Quote Standard Specifications

Overrun %: 0

Underrun %: 0

Ignore For Shipping ☐

Cancel Save

The job was scheduled for 9/16/2013, but it exceeded the job delivery date.

MR Scheduler Extended

Update 9/13/2013 delivery date

Yes No

Notice **Last Mail Date** now reflects scheduling changes.

Customer #:  
Customer:  
Contact:  
Address:

50093  
Claude's Test Customer  
Claude  
156 Dartmouth Drive  
MADISON, AL 35757

Sub Acct

FSC quote

Additional Info

Phone:  
FAX:  
Contact Phone:

415-462-7238  
415-462-7238  
415-462-7238

Quote Date:

9/13/2013

Default Section Size:

0

x

0

First Mail Date:

9/13/2013

Last Mail Date:

9/16/2013

Re-Contact Date:

9/27/2013

Re-Order Date:

9/13/2013

Qty:

25,000

Sales Rep:

Claude

CSR:

House Account

Estimator:

Betty White

Planner:

The Planner

Source Code:

Email

Job Type:

Miscellaneous

Quote is Package Price Based

Job Title:

Fall 2013 Mailing

Description:

Price List:

Default Corporate Price List

Multi Inventory

Quote Standard Specifications

Overrun %:

0

Underrun %:

0

Ignore For Shipping

Cancel

Save

## Send Email when Route Completion Date Conflicts with Route Delivery Date

There are a few basic setups required for automatic e-mail notifications. The first is that the MR Extended must have the e-mail notifications activated. This is simply done by the Scheduler option **Send Email when Route Completion Date Conflicts with Route Delivery Date**. If this check box is selected, the MR Extended sends out automatic e-mail notifications.

These e-mails currently come from [schedulingerrors@efi.com](mailto:schedulingerrors@efi.com).

So, who do the e-mails go to?

The PrintStream User and Menus setup creates a user login that can also be linked to a Sales Rep. In the screen shot below, user Claude is assigned to sales rep "Claude". Claude is what appears in the estimates and jobs. This person also has an e-mail address defined.

MR Extended sends the e-mails to the sales rep defined for the job. The e-mail address is defined in the Menus and Users screen.

**Menus and Users** – Find User, link user to Sales Rep.

**Add/Update User**

Login Id: Claude Password: \*

☐ Password Locked ☒ Prevent user from changing the password

Full Name: Claude

E-Mail Address: claudio.hosch@efi.com

Web Customer:

Security Level (0-5): 0 ☒ Change Database Path Permission

Salesrep: Claude ☐ Show on Web

Employee: 888 Claude

|   | Company Code | Plant Code | Role              |
|---|--------------|------------|-------------------|
| 1 | 01           | 0100       | Administrators    |
| 2 | 02           | 0200       | Drag & Drop Users |

Buttons: Save, Delete, Cancel

Notice the job below in the quote header Sales Rep = Claude.

Customer #: 50093 Sub Acct FSC quote ☐  
Customer: Claude's Test Customer  
Contact: Claude  
Address: 156 Dartmouth Drive Phone: 415-462-7238  
MADISON, AL 35757 FAX: 415-462-7238  
Contact Phone: 415-462-7238  
Quote Date: 9/13/2013 Default Section Size: 0 x 0  
First Mail Date: 9/13/2013  
Last Mail Date: 9/13/2013  
Re-Contact Date: 9/27/2013  
Re-Order Date: 9/13/2013  
Qty: 20,000  
SalesRep: Claude  
CSR: House Account  
Estimator: Andrea Cox  
Planner: Gavin Chapman  
Source Code: Email  
Job Type: Miscellaneous  
Job Title: Mail Job  
Description: Mail Job  
Price List: Default Corporate Price List  
Multi Inventory  
Quote Standard Specifications  
Overrun %: 0  
Underrun %: 0  
Ignore For Shipping ☐  
Cancel Save

The **Delivery Date** in the example job was 9/13/2013. The job was scheduled to happen on 9/17/2013. Select **Yes** to update 9/13/2013 as the delivery date.

9282 [ Mail Job ]  
Settings and Controls  
Committed  
9/13/2013, Quantity: 20000  
Load  
Select an Existing or New Route  
Route 1, Mail Job  
☐ Combine Identical Activities  
☒ Promised Dates ☐ Scheduled Dates  
Options and Restore Steps Hold Route  
Schedule  
Start Scheduling at:  
9/16/2013 8:00:00 AM  
Work Ticket Refresh Columns Show WIP Show Structure Route 1, Mail Job was saved with an ending date-time of 9/16/2013 3:42:00 PM and a Drop Date of 9/16/2013  

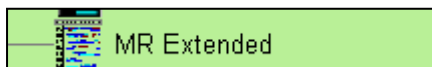
| Component | Task      | Activity Code     | Cost Center | Promised Dtm              | Schedule d Hours | Start DTM | End DTM     | Qty         | Estimated Hours |     |   |   |
|-----------|-----------|-------------------|-------------|---------------------------|------------------|-----------|-------------|-------------|-----------------|-----|---|---|
| >         | Postcards | INKJET UP TO 6... | 81021       | INKJET [01-0100 code:810] |                  | 7.7       | 9/16/201... | 9/16/201... | 20000           | 7.7 | 1 | 1 |

MRSchedulerExtended  
Update 9/13/2013 delivery date  
Yes No

From: schedulingerrors@efi.com [mailto:schedulingerrors@efi.com]  
Sent: Friday, September 13, 2013 2:08 PM  
To: Claude Hosch  
Subject: 9045.99 Message

Route 1, Mail Job Route drop date, 9/17/2013, exceeds final delivery date 9/13/2013

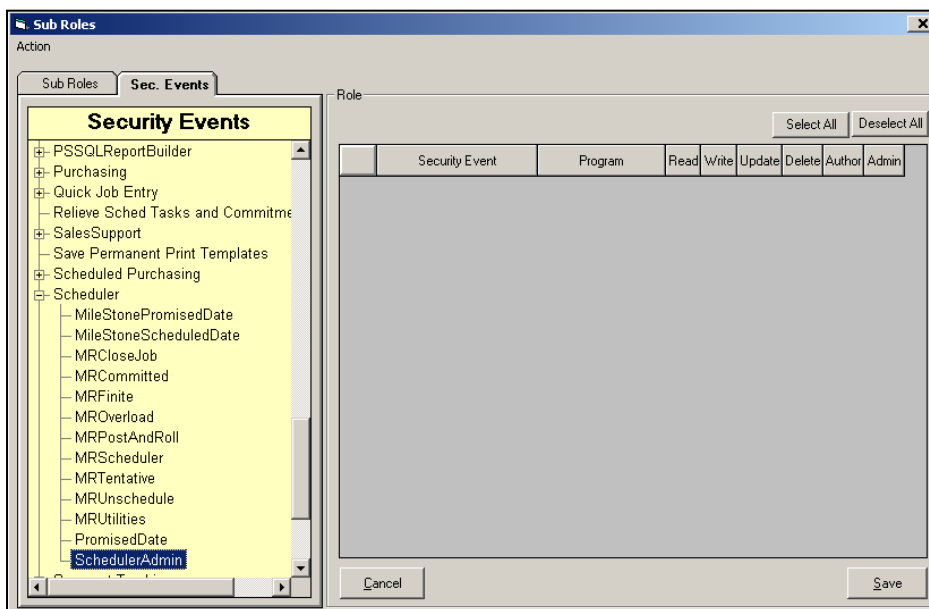
## Job Scheduling



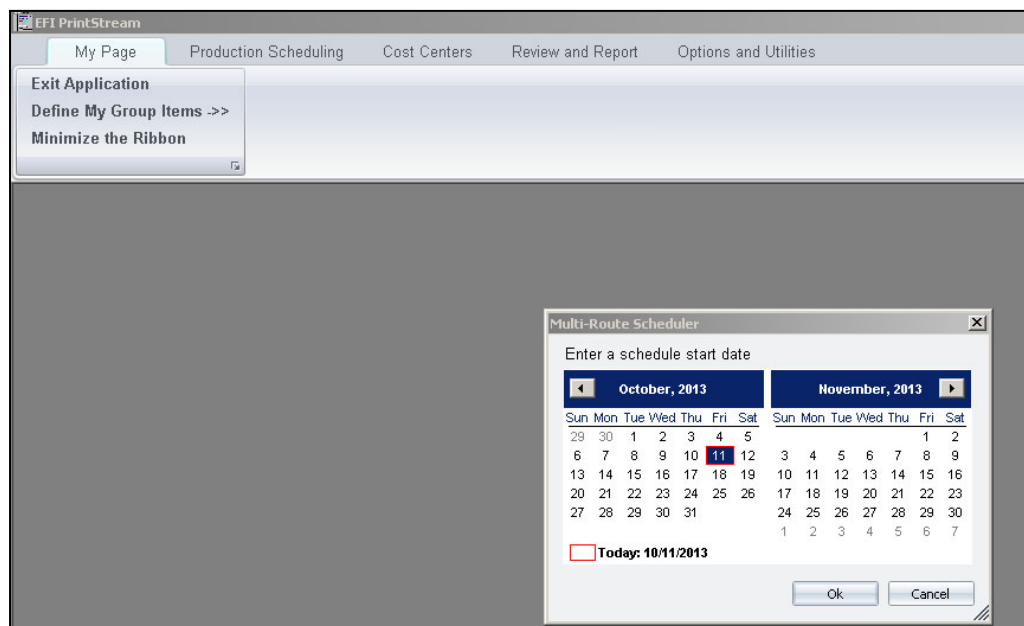
There are two options to open job scheduling, but in order to schedule jobs, the user must be identified as a Master Scheduler or have Administration rights.

### Option 1 for Opening Job Scheduling

Master Scheduler is set-up in **Menus and Users>Security>Security Events>Scheduler> SchedulerAdmin** – Please refer to the Security help doc for creating Roles and Sub Roles.



1. After opening MR Extended, select **OK** in the calendar view. Dates will be discussed later in the document. There are options for opening job scheduling. The below option is the default.

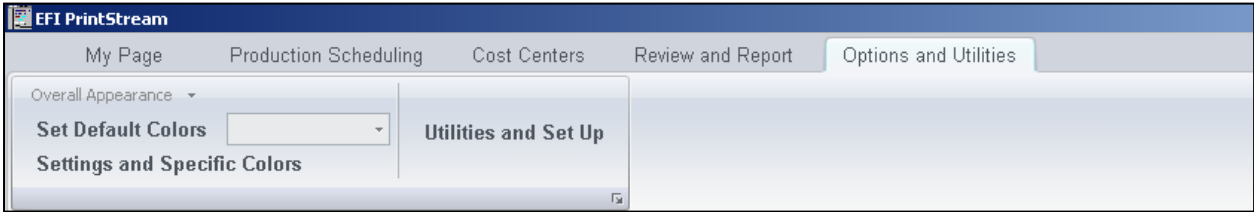


- 2. Select **Production Scheduling** if the user is set-up as Master Scheduler. **Schedule Reschedule** will be displayed.

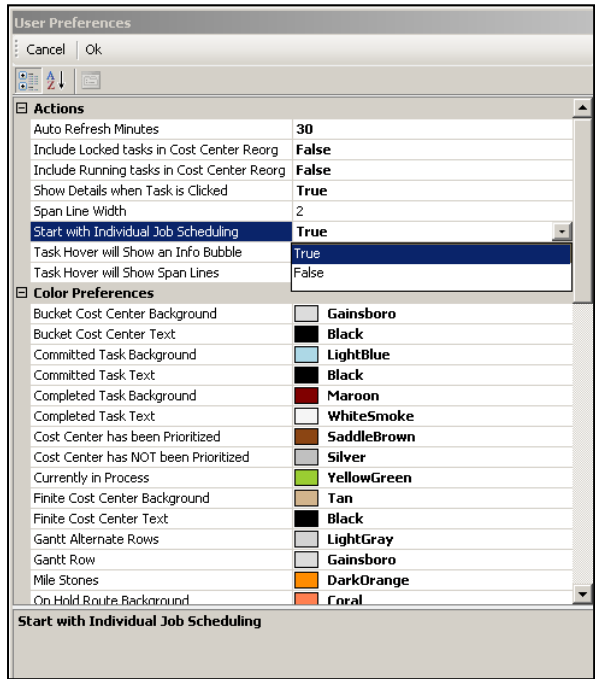


**Option 2 for Opening Job Scheduling**

**Options and Utilities > Settings and Specific Colors**



**Start with Individual Job Scheduling = True > OK**



Re-Start MR Extended –Opens in Job Search screen.



Select a Job for Scheduling

Job Actions: Select Job Multiple Jobs Refresh Jobs Open Print Refresh

Status:  On Hold

| Job Number                            | Customer | Description | Delivery | Accepted Qty | Quote Number | Scheduled Date | CSR | Status |
|---------------------------------------|----------|-------------|----------|--------------|--------------|----------------|-----|--------|
| Status: Committed (Count=19)          |          |             |          |              |              |                |     |        |
| Status: Reschedule Required (Count=5) |          |             |          |              |              |                |     |        |
| Status: Tentative (Count=2)           |          |             |          |              |              |                |     |        |
| Status: Unscheduled (Count=50)        |          |             |          |              |              |                |     |        |

Job Details

Number  
Description  
Accepted Qty  
Delivery Date  
Scheduled Date  
Status  
Quote No  
Final Delivery Date  
Notes  
Reschedule Reason(s)

Representatives

CSR  
Estimator  
Sales Rep

Customer

Name  
Account No  
Company Code

Select a Job for Scheduling

Job Actions: Select Job Multiple Jobs Refresh Jobs Open Print Refresh

Status:  On Hold

| Job Number                             | Customer | Description | Delivery | Accepted Qty | Quote Number | Scheduled Date | CSR | Status |
|----------------------------------------|----------|-------------|----------|--------------|--------------|----------------|-----|--------|
| Status: Committed (Count=397)          |          |             |          |              |              |                |     |        |
| Status: Reschedule Required (Count=52) |          |             |          |              |              |                |     |        |
| Status: Tentative (Count=10)           |          |             |          |              |              |                |     |        |
| Status: Unscheduled (Count=4097)       |          |             |          |              |              |                |     |        |

Job Details

Number  
Description  
Accepted Qty  
Delivery Date  
Scheduled Date  
Status  
Quote No  
Final Delivery Date  
Notes  
Reschedule Reason(s)

Representatives

CSR  
Estimator  
Sales Rep

Customer

Name  
Account No  
Company Code

- **Committed** – Scheduled Jobs
- **Rescheduled Required** – Scheduled Jobs where a change has occurred within the job after it was scheduled. The job remains in committed status but may or may not need to be rescheduled, depending on the changes.
- **Tentative** – Jobs that have been scheduled tentatively, taking resources so other jobs cannot be scheduled in place of them. These jobs will not appear in Shop Floor for processing.
- **Unscheduled**- Quotes that have been converted to jobs but not scheduled.

Select the drop-down (+) to view job list. The background colors can be edited to identify jobs within each branch.

Select a Job for Scheduling

Job Actions: Select Job Multiple Jobs Refresh Jobs Open Print Refresh

Status:  On Hold

| Job Number                    | Customer | Description                                       | Delivery | Accepted Qty                | Quote Number | Scheduled Date      | CSR | Status |
|-------------------------------|----------|---------------------------------------------------|----------|-----------------------------|--------------|---------------------|-----|--------|
| Status: Committed (Count=439) |          |                                                   |          |                             |              |                     |     |        |
| 25000                         | No       | 100000 12/23/2009 Michael Carpio OA Testing Corp. | 3351.99  | Copy of test                | 11/17/2014   | Andrew Cor.         |     |        |
| 11294                         | No       | 1 7/17/2014 Need a New Customer                   | 11327.99 | Printed POD                 | 11/17/2014   | Opal Richey         |     |        |
| 25101                         | No       | 182000 5/22/2009 Alaska Inc.                      | 3565.99  | Vacation Gateway Mailing    | 11/10/2014   | Linda Polard        |     |        |
| 11303                         | No       | 75000 7/24/2014 Leaha Account                     | 11336.99 | POD                         | 10/30/2014   | Opal Richey         |     |        |
| 11311                         | No       | 74700 8/5/2014 Leaha Account                      | 11343.99 | POD                         | 10/30/2014   | Opal Richey         |     |        |
| 11318                         | No       | 50000 6/24/2014 Hogwarts Images                   | 11291.99 | 06/24/14 12 Hour shift test | 10/30/2014   | Phenova McGinnagall |     |        |
| 11319                         | No       | 30000 8/14/2014 Claude's Test Customer            | 11353.99 | Test Claude 8-14-2014       | 10/29/2014   | House Account       |     |        |
| 26000                         | No       | 1000 1/1/2010 Alaska Inc.                         | 3577.99  | in title test               | 10/29/2014   | John                |     |        |
| 26005                         | No       | 101 1/1/2010 Alaska Inc.                          | 3535.99  | Test new title              | 10/29/2014   | Sales Person        |     |        |
| 25008                         | No       | 101 1/1/2010 Alaska Inc.                          | 3530.99  | New title                   | 10/29/2014   | Linda Polard        |     |        |
| 11320                         | No       | 39425 9/7/2014 Leaha Account                      | 11364.99 | Misc postage testing        | 10/29/2014   | DRM CSRGuy2         |     |        |

Select a Job for Scheduling

Job Actions: Select Job Multiple Jobs Refresh Jobs Open Print Refresh

Status:  On Hold

| Job Number                             | Customer | Description                           | Delivery | Accepted Qty                           | Quote Number | Scheduled Date | CSR | Status |
|----------------------------------------|----------|---------------------------------------|----------|----------------------------------------|--------------|----------------|-----|--------|
| Status: Committed (Count=439)          |          |                                       |          |                                        |              |                |     |        |
| Status: Reschedule Required (Count=53) |          |                                       |          |                                        |              |                |     |        |
| 11340                                  | No       | 10000 9/6/2014 Claude's Test Customer | 11380.99 | Test fix special events                | 6/28/2014    | House Account  |     |        |
| 10414                                  | No       | 10000 7/2/2014 Claude's Test Customer | 10295.99 | Letter # 10                            | 7/2/2014     | House Account  |     |        |
| 9902                                   | No       | 25000 10/1/2013 24HR Test Company     | 9914.99  | 11/13 Test of MR Extended Ready to Run | 6/25/2014    | DRM CSRGuy1    |     |        |
| 5647                                   | No       | 50000 12/1/2009 24HR Test Company     | 4820.99  | Copy of Job file                       | 4/24/2014    | DRM CSRGuy1    |     |        |
| 9819                                   | No       | 10000 1/1/2014 Leaha Account          | 9627.99  | wp                                     | 4/2/2014     | DRM CSRGuy2    |     |        |

Select a Job for Scheduling

Job Actions | Select Job: | Refresh Jobs | Refresh

Status:

☐ Status: Committed (Count=439)  
☐ Status: Reschedule Required (Count=53)  
☐ Status: Tentative (Count=18)

| Job Number | On Hold | Accepted Qty | Delivery Date | Customer         | Quote Number | Description                               | Scheduled Date | CSR         |
|------------|---------|--------------|---------------|------------------|--------------|-------------------------------------------|----------------|-------------|
| 15480      | No      | 60000        | 8/19/2014     | DMH Test Company | 10291.99     | 061914 Current Run Rate Test              | 8/20/2014      | DMH CSRGuy1 |
| 9850       | No      | 100000       | 10/20/2014    | Alaska Inc.      | 9860.99      | Copy of February Mailer                   | 10/20/2014     | DMH CSRGuy1 |
| 9146       | No      | 120000       | 10/20/2014    | Leahs Account    | 9898.99      | test                                      | 10/20/2014     | DMH CSRGuy2 |
| 8605       | No      | 100000       | 12/26/2012    | DMH Test Company | 8536.99      | Copy of 100012 M8 Extended Insert & Inset | 12/20/2012     | DMH CSRGuy1 |
| 8819       | No      | 80000        | 12/24/2012    | DMH Test Company | 8527.99      | Copy of 120412 DMH Insert Single          | 12/27/2012     | DMH CSRGuy1 |
| 8429       | No      | 30000        | 10/25/2012    | DMH Test Company | 8071.99      | 061912 M8 Extended Back Test Job #2       | 10/25/2012     | DMH CSRGuy1 |
| 9402       | No      | 100000       | 12/27/2011    | DMH Test Company | 4760.99      | 111209 DMH Insert                         | 12/27/2011     | DMH CSRGuy1 |

Select a Job for Scheduling

Job Actions | Select Job: | Refresh Jobs | Refresh

Status:

☐ Status: Committed (Count=439)  
☐ Status: Reschedule Required (Count=53)  
☐ Status: Tentative (Count=18)  
☐ Status: Unscheduled (Count=1086)

| Job Number | On Hold | Accepted Qty | Delivery Date | Customer                         | Quote Number | Description                       | Scheduled Date | CSR           |
|------------|---------|--------------|---------------|----------------------------------|--------------|-----------------------------------|----------------|---------------|
| 2411       | Yes     | 10000        | 12/17/2009    | DMH Test Company                 | 3044.99      | Copy of 021709 DMH Insert SP Test | 1/1/2014       | DMH CSRGuy1   |
| 660        | Yes     | 250000       | 10/25/2006    | Alaska Inc.                      | 610.99       | Hot days of Summer                | 12/30/2013     | Kathy Delgado |
| 99999912   | No      | 1000         | 12/14/2008    | Alaska Inc.                      | 1492.99      | Copy of Copy of Modifier Test     |                | Andrea Cox    |
| 456789123  | No      | 1            | 6/28/2008     | Leahs Account                    | 2050.99      | Copy of Create Invoice            |                | Opal Richey   |
| 321456789  | No      | 10000        | 10/1/2009     | Leahs Account                    | 4029         | test                              |                | Opal Richey   |
| 123456789  | No      | 80000        | 10/20/2009    | Bulba Inc.                       | 3077.99      | Copy of Mail Job for June Release |                | Opal Richey   |
| 999988     | No      | 234567       | 10/22/2009    | West Jordan Printing and Mailing | 3563.99      | May Mailer                        |                | Linda Pollard |
| 333111     | No      | 1            | 8/26/2008     | Leahs                            | 2395         | test                              |                | Linda Pollard |

Options and Utilities/Settings and Specific Colors/Color Preferences –These are specific colors based on PrintStream user login.

EFI PrintStream

My Page | Production Scheduling | Cost Centers | Review and Report | Options and Utilities

Utilities and Set Up

Overall Appearance:  | Set Paths:

Settings and Specific Colors

User Preferences

Cancel | OK

Auto Refresh Minutes:

☐ Include Locked tasks when Scheduling: True  
☐ Include Running tasks when Scheduling: True  
☐ Show Details when Task is Clicked: True  
☐ Span Line Width: 2  
☐ Start with Individual Job Scheduling: False  
☐ Task Hover will Show an Info Bubble: True  
☐ Task Hover will Show Span Lines: True

Color Preferences

Bucket Cost Center Background: ☐ Gainsboro  
 Bucket Cost Center Text: ☐ Black  
 Committed Task Background: ☐ LightSteelBlue  
 Committed Task Text: ☐ Black  
 Completed Task Background: ☐ Maroon  
 Completed Task Text: ☐ WhiteSmoke  
 Cost Center has been Prioritized: ☐ SaddleBrown  
 Cost Center has NOT been Prioritized: ☐ Silver  
 Currently in Process: ☐ YellowGreen  
 Fink Cost Center Background: ☐ Tan  
 Fink Cost Center Text: ☐ Black  
 Gantt Alternate Rows: ☐ LightGray  
 Gantt Row: ☐ Gainsboro  
 Mile Stones: ☐ DarkOrange  
 On Hold Route Background: ☐ Indium  
 On Hold Route Text: ☐ WhiteSmoke

Auto Refresh Minutes

**Job Actions** - A job must be selected prior to using any of the job actions.

Job Actions

Select a Job for Scheduling

Job Actions | Select Job: | Refresh Jobs | Refresh

Status:

☐ Status: Committed (Count=439)  
☐ Status: Reschedule Required (Count=53)  
☐ Status: Tentative (Count=18)  
☐ Status: Unscheduled (Count=1086)

| Job Number | On Hold | Accepted Qty | Delivery Date | Customer                        | Quote Number | Description               | Scheduled Date | CSR                |
|------------|---------|--------------|---------------|---------------------------------|--------------|---------------------------|----------------|--------------------|
| 11294      | No      | 100000       | 12/31/2009    | Michael Carpio QA Testing Corp. | 3351.99      | Copy of test              | 11/17/2014     | Andrea Cox         |
| 25101      | No      | 1            | 7/17/2014     | Need a New Customer             | 11327.99     | Printed POD               | 11/17/2014     | Opal Richey        |
| 11303      | No      | 162000       | 5/22/2009     | Alaska Inc.                     | 3565.99      | Vacation Getaway Mailing  | 11/10/2014     | Linda Pollard      |
| 11313      | No      | 75000        | 7/24/2014     | Leahs Account                   | 11336.99     | POD                       | 10/30/2014     | Opal Richey        |
| 11311      | No      | 74700        | 8/5/2014      | Leahs Account                   | 11343.99     | POD                       | 10/30/2014     | Opal Richey        |
| 11258      | No      | 50000        | 6/24/2014     | Hogwarts Images                 | 11291.99     | 062414 12 Hour shift test | 10/30/2014     | Minerva McGonagall |
| 11319      | No      | 30000        | 8/14/2014     | Claude's Test Customer          | 11353.99     | Test Claude 8-4-2014      | 10/29/2014     | House Account      |

Select a Job for Scheduling

Job Actions | Select Job: | Refresh Jobs | Refresh

Status:

☐ Status: Committed (Count=439)  
☐ Status: Reschedule Required (Count=53)  
☐ Status: Tentative (Count=18)  
☐ Status: Unscheduled (Count=1086)

| Job Number | On Hold | Accepted Qty | Delivery Date | Customer                        | Quote Number | Description  | Scheduled Date | CSR         |
|------------|---------|--------------|---------------|---------------------------------|--------------|--------------|----------------|-------------|
| 11294      | No      | 100000       | 12/31/2009    | Michael Carpio QA Testing Corp. | 3351.99      | Copy of test | 11/17/2014     | Andrea Cox  |
| 25101      | No      | 1            | 7/17/2014     | Need a New Customer             | 11327.99     | Printed POD  | 11/17/2014     | Opal Richey |

**Schedule** – Opens a job for scheduling.

**Close** – Removes a job from scheduling.

**Un-Schedule** – Un-Schedules a job including all routes.

**Committed<->Tentative** – Moves a scheduled job that has been (Committed to Tentative) or (Tentative to Committed).

**Work Order** – Produces work order for the selected job.

**Status** – Displays all process assigned to a job, steps that have not started, completed steps and steps in process.

Select Job: 25002

**Select Job** – Allows the user to input a job number that will open job scheduling. Select (Enter) keyboard after choosing the job.

The screenshot shows a software window titled '25002 | Test new Job Title'. It features a 'Settings and Controls' sidebar on the left with options like 'Load', 'Combine Identical Activities', 'Promised Dates', and 'Scheduled Dates'. The main area displays a table of tasks with columns for Component, Task, Cost Center, Activity Code, Start DTM, End DTM, Promised Dtm, Lag Time Hours, Scheduled Hours, Qty, Use, and Re... The tasks listed include 'Data Entry- Keying PS', 'Letter[2976]', 'envelope[139]', '02 Item[66527]', and 'INSERT, METER, SORT #10'. A 'Schedule' button is visible in the bottom left of the main area.

Multiple Jobs

**Multiple Jobs** – This option allows more than one job to be scheduled. These are jobs that contain one drop, one package and are quick turn projects.

Using Ctrl or Shift, select the jobs to be scheduled from the (Unscheduled) branch and choose **Schedule Jobs**.

The screenshot shows a window titled 'Select a Job for Scheduling'. It has a 'Job Actions' bar with buttons for 'Select Job', 'Schedule Jobs' (highlighted with a red box), and 'Refresh Jobs'. Below is a table of jobs with columns for Status, Scheduled Date, Job Number, On Hold, Accepted Qty, Delivery Date, Customer, Quote Number, Description, and CSR. The jobs listed include '201102', '95000', '89698', '30000', '11382', '11381', and '11380'.

**Enter Start Date and Start Time**

**Last Priority Start Date and Start Time**

**Observe Promised Dates** – If promise dates have been entered, then scheduling will not schedule a process to begin before the designated promise date.

**Continue Scheduling** – Produces a schedule for the selected jobs.

Review and set Scheduling Parameters

Start Date

9/18/2014

Start Time

10:09:00 AM

Last Priority Start Date

9/16/2014

Start Time

9:09 AM

Observe Promised Dates

Cancel

Continue Scheduling

MRSchedulerExtended

Schedule Multiple Jobs results, Scheduled:3, Errors:0

OK

**Multi Jobs** – After the jobs have been scheduled, they are available to be prioritized and published to Shop Floor. This process will be discussed later in the document.

11380 [Daily Cards A]

Daily Cards A loaded with an ending date-time of 9/18/2014 3:14:00 PM and a Drop Date of 9/18/2014

| Component               | Task                           | Cost Center               | Activity Code       | Start DTM           | End DTM           | Promised Dtm | Lag Time Hours | Scheduled Hours | Qty   | Use | Re... |
|-------------------------|--------------------------------|---------------------------|---------------------|---------------------|-------------------|--------------|----------------|-----------------|-------|-----|-------|
| ADDRESS STANDARDIZATION | PROGRAMMING [01-0100 code:340] | 34036                     | 9/18/2014 10:09 ... | 9/18/2014 10:15 ... |                   |              |                | 0.1             | 10000 | 1   |       |
| Postcards               | INKJET UP TO 6x9 & SORT        | INKJET [01-0100 code:810] | 81021               | 9/18/2014 10:14 ... | 9/18/2014 3:14 PM |              | 1.25           | 5               | 10000 | 1   |       |

11381 [Daily Cards B]

Daily Cards B loaded with an ending date-time of 9/18/2014 3:14:00 PM and a Drop Date of 9/18/2014

| Component               | Task                           | Cost Center               | Activity Code       | Start DTM           | End DTM           | Promised Dtm | Lag Time Hours | Scheduled Hours | Qty   | Use | Re... |
|-------------------------|--------------------------------|---------------------------|---------------------|---------------------|-------------------|--------------|----------------|-----------------|-------|-----|-------|
| ADDRESS STANDARDIZATION | PROGRAMMING [01-0100 code:340] | 34036                     | 9/18/2014 10:09 ... | 9/18/2014 10:15 ... |                   |              |                | 0.1             | 10000 | 1   |       |
| Postcards               | INKJET UP TO 6x9 & SORT        | INKJET [01-0100 code:810] | 81021               | 9/18/2014 10:14 ... | 9/18/2014 3:14 PM |              | 1.25           | 5               | 10000 | 1   |       |

11382 [Daily Cards C]

Daily Cards C loaded with an ending date-time of 9/18/2014 3:14:00 PM and a Drop Date of 9/18/2014

| Component               | Task                           | Cost Center               | Activity Code       | Start DTM           | End DTM           | Promised Dtm | Lag Time Hours | Scheduled Hours | Qty   | Use | Re... |
|-------------------------|--------------------------------|---------------------------|---------------------|---------------------|-------------------|--------------|----------------|-----------------|-------|-----|-------|
| ADDRESS STANDARDIZATION | PROGRAMMING [01-0100 code:340] | 34036                     | 9/18/2014 10:09 ... | 9/18/2014 10:15 ... |                   |              |                | 0.1             | 10000 | 1   |       |
| Postcards               | INKJET UP TO 6x9 & SORT        | INKJET [01-0100 code:810] | 81021               | 9/18/2014 10:14 ... | 9/18/2014 3:14 PM |              | 1.25           | 5               | 10000 | 1   |       |

UnSchedule Jobs

**Un-Schedule Jobs**- Allows the user to select a single or multiple jobs from the Committed branch and unscheduled them. This will remove all Routes and place the job or jobs back in the Unscheduled branch.

Select a Job for Scheduling

Job Actions | Select Job: | UnSchedule Jobs | Refresh Jobs | Open | Print | Refresh

Status

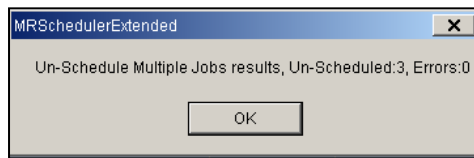
| Ok | Scheduled Date | Job Nu... | On Hold | Accepted Qty | Delivery Date | Customer                         | Quote Number | Description   | CSR           |
|----|----------------|-----------|---------|--------------|---------------|----------------------------------|--------------|---------------|---------------|
| ?  | 9/1/2014       | 25001     | No      | 4            | 1/1/2009      | Alaska Inc.                      | 3454.99      | 3M wow        | Sales Person  |
| ?  | 11/17/2014     | 25000     | No      | 1000000      | 12/31/2009    | Michael Carpino QA Testing Corp. | 3351.99      | Copy of test  | Andrea Cox    |
| ?  | 9/18/2014      | 11382     | No      | 10000        | 9/18/2014     | Claude's Test Customer           | 11421.99     | Daily Cards C | House Account |
| ?  | 9/18/2014      | 11381     | No      | 10000        | 9/18/2014     | Claude's Test Customer           | 11420.99     | Daily Cards B | House Account |
| ?  | 9/18/2014      | 11380     | No      | 10000        | 9/18/2014     | Claude's Test Customer           | 11419.99     | Daily Cards A | House Account |

MRSchedulerExtended

Are you certain you want to unschedule 3 jobs

Yes

No



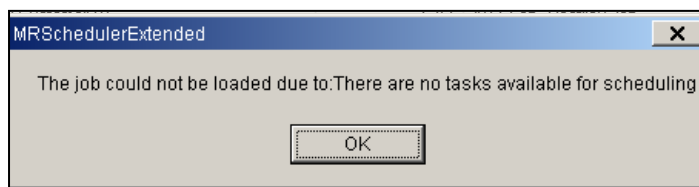
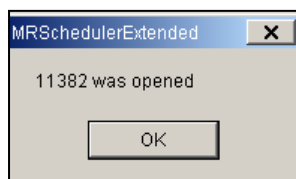
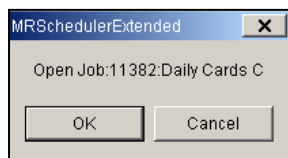
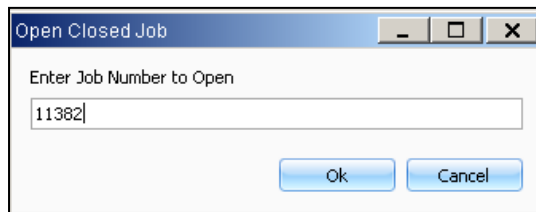
**Refresh Jobs** – This will update quotes that have been converted to job and places them in the Un-Scheduled branch. The system automatically refreshes jobs once the scheduling module is launch.



Expands or Collapses all scheduling branches.



**Open** – If a job was closed out, this option will re-open the job the job for Scheduling. Once the job has been reopened, the steps need to be restored from within the job schedule. Opening a closed job does not place it back into the previous schedule.



**Select Options and Restore Steps** – Using the drop-down (Closed Tasks), select the task you wish to reopen. Select Open. These will re-appear back onto the shop floor workstation for processing.

11382 [Daily Cards C]

Settings and Controls

Work Ticket Refresh Columns Show WIP Show Structure Fit Columns

Estimated Job loaded for Scheduling

Unscheduled

9/18/2014->9/18/2014, Qty:10000

Load

Select an Existing or New Route

(new)

Combine Identical Activities

Promised Dates Scheduled Dates

Options and Restore Steps

Schedule

Start Scheduling at

9/16/2014 7:00:00 AM

Options and Step Restore

Options

Grid Qty and Hours changes are tied

Show All Cost Centers on WIP

Restore

Closed Tasks

ADDRESS STANDARDIZATION

Postcards-INJET UP TO 6x9 & SORT

Hide

Component

Task

Cost Center

Activity Code

Start DTM

End DTM

Promised Dtm

Scheduled Hours

Qty

Use

MRSchedulerExtended

Task opened

OK



**Print** – Prints the list of jobs within the branches.

| Jobs Available for Scheduling. Printed:9/16/2014 at 2:02 PM |                |            |         |              |               |                                |                                              |               |
|-------------------------------------------------------------|----------------|------------|---------|--------------|---------------|--------------------------------|----------------------------------------------|---------------|
| Ok                                                          | Scheduled Date | Job Number | On Hold | Accepted Qty | Delivery Date | Customer                       | Quote Number                                 | CSR           |
| Status: Committed (Count=437)                               |                |            |         |              |               |                                |                                              |               |
| ?                                                           | 10/27/2014     | 27004      | No      | 10100        | 6/26/2014     | Leahs Account                  | 11290.99 6/26/14                             | DMM CSRGuy2   |
| ?                                                           | 10/28/2014     | 27003      | No      | 10100        | 6/16/2014     | Leahs Account                  | 11232.99 6/16/14                             | DMM CSRGuy2   |
| ?                                                           | 10/28/2014     | 27001      | No      | 10100        | 6/14/2014     | Leahs Account                  | 11185.99 6/14/14                             | DMM CSRGuy2   |
| ?                                                           | 10/29/2014     | 26000      | No      | 1000         | 1/1/2010      | Alaska Inc.                    | 3577.99 jm title test                        | John          |
| ?                                                           | 11/10/2014     | 25101      | No      | 182000       | 5/22/2009     | Alaska Inc.                    | 3565.99 Vacation Getaway Mailing             | Linda Pollard |
| ?                                                           | 9/4/2014       | 25009      | No      | 13500        | 5/20/2009     | Alaska Inc.                    | 3539.99 Sample Job Title Through XML         | Linda Pollard |
| ?                                                           | 10/29/2014     | 25008      | No      | 101          | 1/1/2010      | Alaska Inc.                    | 3538.99 New title                            | Linda Pollard |
| ?                                                           | 10/29/2014     | 25005      | No      | 101          | 1/1/2010      | Alaska Inc.                    | 3535.99 Test new title                       | Sales Person  |
| ?                                                           | 9/1/2014       | 25002      | No      | 102          | 1/1/2009      | Alaska Inc.                    | 3456.99 Test new Job Title                   | Sales Person  |
| ?                                                           | 9/1/2014       | 25001      | No      | 4            | 1/1/2009      | Alaska Inc.                    | 3454.99 JM wow                               | Sales Person  |
| ?                                                           | 11/17/2014     | 25000      | No      | 1000000      | 12/31/2009    | Michael Carpino QA Testing Cor | 3351.99 Copy of test                         | Andrea Cox    |
| ?                                                           | 9/16/2014      | 11366      | No      | 20000        | 9/16/2014     | Claude's Test Customer         | 11405.99 Test MR Programs                    | House Account |
| ?                                                           | 8/29/2014      | 11349      | No      | 10000        | 8/31/2014     | Leahs Account                  | 11388.99 test                                | DMM CSRGuy2   |
| ?                                                           | 10/27/2014     | 11332      | No      | 50000        | 8/18/2014     | ABC Company                    | 11366.99 pstg test                           | Linda Pollard |
| ?                                                           | 10/29/2014     | 11330      | No      | 39425        | 9/7/2014      | Leahs Account                  | 11364.99 Misc postage testing                | DMM CSRGuy2   |
| ?                                                           | 8/15/2014      | 11328      | No      | 25000        | 8/25/2014     | Alaska Inc.                    | 11362.99 Alt Cost Center Test                | DMM CSRGuy1   |
| ?                                                           | 10/29/2014     | 11326      | No      | 50000        | 8/15/2014     | ABC Company                    | 11360.99 test                                | Linda Pollard |
| ?                                                           | 9/5/2014       | 11325      | No      | 100000       | 8/21/2014     | DMM Test Company               | 11359.99 081214 Test of Shop Floor Component | DMM CSRGuy1   |
| ?                                                           | 10/28/2014     | 11320      | No      | 10000        | 8/4/2014      | Alaska Inc.                    | 11354.99 Copy of Copy of Test Press Waste    | DMM CSRGuy1   |



**Refresh** – Restores all columns back to the default. If a user has added, removed or moved column headers around, this option will restore all back to the default setting.

Job Actions Select Job: 11382 Schedule Jobs Refresh Jobs

Open Print Refresh

Status On Hold

Ok Job Number Description Delivery Date Accepted Qty Quote Number Customer Scheduled Date CSR Status Code

Status: Committed (Count=437)

Status: Reschedule Required (Count=56)

Status: Tentative (Count=18)

Status: Unscheduled (Count=4101)

**Details** – Select a job from any branch to view job details.

| Details                |                             |
|------------------------|-----------------------------|
| <b>Job</b>             |                             |
| Number                 | 11380                       |
| Description            | Daily Cards A               |
| Accepted Qty           | 10000                       |
| Delivery Date          | 9/18/2014 12:00:00 AM       |
| Scheduled Date         |                             |
| Status                 | Unscheduled                 |
| Quote No               | 11419.99                    |
| Final Delivery Date    | 9/18/2014 12:00:00 AM       |
| Notes                  |                             |
| Reschedule Reason(s)   | Not flagged for Reschedule. |
| <b>Representatives</b> |                             |
| CSR                    | House Account               |
| Estimator              | Claude                      |
| Sales Rep              | Claude                      |
| <b>Customer</b>        |                             |
| Name                   | Claude's Test Customer      |
| Account No             | 50093                       |
| Company Code           | 01                          |

**Number** – Job Number

**Description** – Job Description

**Delivery Date** – First Mail Date on the job

**Scheduled Date** – Date the last process on the job is scheduled to be completed

**Status** – Committed, Un-Scheduled, Reschedule Required or Tentative

**Quote No** – Quote Number

**Final Delivery Date** – Last Mail Date on the job

**Notes** – N/A

**Rescheduled Reason** – Reason job was moved from Committed to Reschedule Required, may require job to be opened in scheduling to see reason.

**CSR** – Customer Service Rep assigned to the job

**Estimator** – Estimator assigned to the job

**Sales Rep** – Sales Representative assigned to the job

**Name** – Customer Name

**Account No** – Account Number

**Company Code** – Company the job was opened in

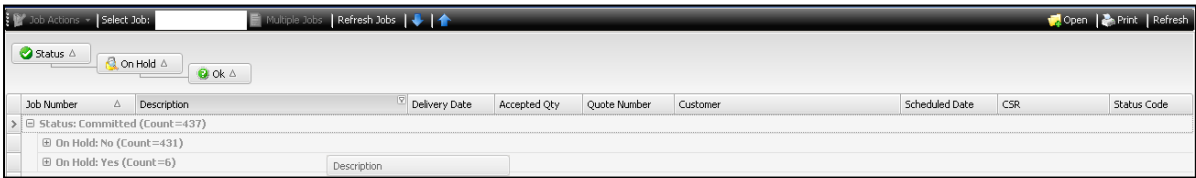
**Each of the column headers can be arranged, removed and sorts created. The display will save based on PrintStream user login.**

| Job Number                             | Description | Delivery Date | Accepted Qty | Quote Number | Customer | Scheduled Date | CSR | Status Code |
|----------------------------------------|-------------|---------------|--------------|--------------|----------|----------------|-----|-------------|
| Status: Committed (Count=493)          |             |               |              |              |          |                |     |             |
| On Hold: No (Count=431)                |             |               |              |              |          |                |     |             |
| On Hold: Yes (Count=6)                 |             |               |              |              |          |                |     |             |
| Status: Reschedule Required (Count=57) |             |               |              |              |          |                |     |             |
| Status: Tentative (Count=18)           |             |               |              |              |          |                |     |             |
| Status: Unscheduled (Count=4100)       |             |               |              |              |          |                |     |             |

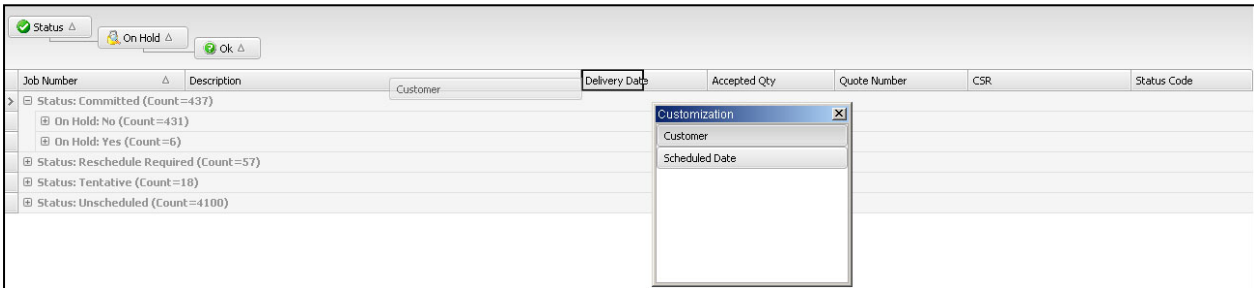
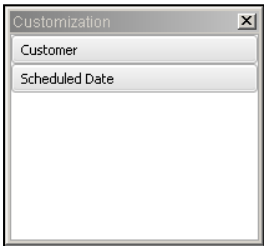
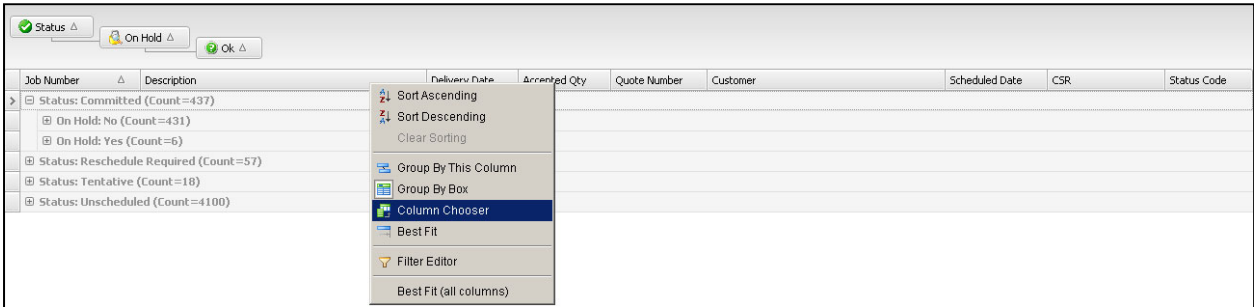
**Move Columns** – Select column and while holding left mouse click, drag column to desired placement.

| Job Number                    | Description | Delivery Date | Accepted Qty | Quote Number | Customer | Description | Scheduled Date | CSR | Status Code |
|-------------------------------|-------------|---------------|--------------|--------------|----------|-------------|----------------|-----|-------------|
| Status: Committed (Count=437) |             |               |              |              |          |             |                |     |             |

**Remove Columns** – Select the column and while holding, left mouse click and drag the column out of header until (X) appears. Then release.



**Add Columns** – Right-click any column header and select **Column Chooser**. A list of available column headers will appear. While holding the left mouse click, select the desired column header, drag and drop into the column header.



**Create Sorts**- Select the column header and while holding the left mouse click down, drag and drop the column to the top.





Right-click options are available for additional sort and will save based on user login. Sorts can be removed using the right-click option (Clear Sorting).

| Job Number | Delivery Date | Description            | Accepted Qty | Quote Number | CSR | Status Code |
|------------|---------------|------------------------|--------------|--------------|-----|-------------|
| 11360      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11361      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11362      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11363      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11364      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11365      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11366      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11367      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11368      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11369      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11370      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11371      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11372      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11373      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11374      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11375      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11376      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11377      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11378      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11379      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11380      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |

|            |               |             |
|------------|---------------|-------------|
| Job Number | Delivery Date | Description |
|------------|---------------|-------------|

Filters can be added by using the icon below. Hovering over the column header will display filter icon.

|            |               |             |
|------------|---------------|-------------|
| Job Number | Delivery Date | Description |
|------------|---------------|-------------|

|            |               |                        |
|------------|---------------|------------------------|
| Job Number | Delivery Date | Description            |
| 11360      | 11/10/2014    | Copy of RBC Ministries |
| 11361      | 11/10/2014    | Copy of RBC Ministries |
| 11362      | 11/10/2014    | Copy of RBC Ministries |
| 11363      | 11/10/2014    | Copy of RBC Ministries |
| 11364      | 11/10/2014    | Copy of RBC Ministries |
| 11365      | 11/10/2014    | Copy of RBC Ministries |
| 11366      | 11/10/2014    | Copy of RBC Ministries |
| 11367      | 11/10/2014    | Copy of RBC Ministries |
| 11368      | 11/10/2014    | Copy of RBC Ministries |
| 11369      | 11/10/2014    | Copy of RBC Ministries |
| 11370      | 11/10/2014    | Copy of RBC Ministries |
| 11371      | 11/10/2014    | Copy of RBC Ministries |
| 11372      | 11/10/2014    | Copy of RBC Ministries |
| 11373      | 11/10/2014    | Copy of RBC Ministries |
| 11374      | 11/10/2014    | Copy of RBC Ministries |
| 11375      | 11/10/2014    | Copy of RBC Ministries |
| 11376      | 11/10/2014    | Copy of RBC Ministries |
| 11377      | 11/10/2014    | Copy of RBC Ministries |
| 11378      | 11/10/2014    | Copy of RBC Ministries |
| 11379      | 11/10/2014    | Copy of RBC Ministries |
| 11380      | 11/10/2014    | Copy of RBC Ministries |

Remember to uncheck or delete the filter after use.

|            |               |                        |              |              |     |             |
|------------|---------------|------------------------|--------------|--------------|-----|-------------|
| Job Number | Delivery Date | Description            | Accepted Qty | Quote Number | CSR | Status Code |
| 11360      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11361      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11362      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11363      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11364      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11365      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11366      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11367      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11368      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11369      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11370      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11371      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11372      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11373      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11374      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11375      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11376      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11377      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11378      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11379      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |
| 11380      | 11/10/2014    | Copy of RBC Ministries | 21246        | 367.99       |     |             |

|        |    |         |
|--------|----|---------|
| Status | Ok | On Hold |
|--------|----|---------|

**Status** – Committed, Reschedule Required, Tentative or Un-Scheduled

**Ok** – This option is located in the General branch of Mail Estimating. If Ok to Schedule has been selected, the job will appear in scheduling as OK: Yes. This option is sometimes used to prevent the scheduler from writing a job schedule several times on a project that has not been approved.

**Mail Estimating (Print & Mail)**

- Quote Header
- Estimating
- Credit Checks and Pricing Review
- Job Scheduling and Shipping
  - Scripts
  - NetScripts
  - General
  - Inventory Details
  - Shipping
  - New Shipping
  - Work Order (mail)
  - Work Ticket (mail)
  - Combined WOVNT
  - Inventory Matrix
  - Prepared for Address
  - Change Orders
  - Change Orders For Billing
  - Scheduling

**O.E. General**

☒ OK to Schedule Job

**General**

Start Date: 9/16/2014 Priority: New Job: Yes  
 First Mail Date: 9/18/2014 Part Number: Exact Repeat: Yes  
 Last Mail Date: 9/18/2014 P/O Number: Alter Specs: Yes  
 Re-Order Date: 9/16/2014 Previous Job: Art Required: Yes  
 Work w/Job Number: Film Required: Yes  
 Reprint from: Unders: Yes  
 Film File Number: Overs: Yes

Important:

**Bill to**

Customer #: 50093 01: Streamline  
 Customer: Claude's Test Customer  
 Contact: Claude  
 Address: 156 Dartmouth Drive  
 MADISON, AL  
 Zip: 35757  
 Save Contact As: Claude  
 Comments:  
 Customer Name As Defined For Selected Address  
 Claude's Test Customer

**Leftovers to**

Customer: Claude's Test Customer  
 Address: 156 Dartmouth Drive  
 MADISON, AL  
 Zip: 35757  
 Contact: Claude  
 Comments:

O.E. Notes Print Notes Cancel Save

**On Hold** – Jobs are placed on hold using Job Status and cannot be worked on in Shop Floor.

**PrintStream - DB: W:\GenericData\Stream\_14\_0\GenericMulti\_2008\_...**

File Options View Job Status Reports

- Search for Job to Review/Set Ctrl+S
- Review/Set Individual Job Ctrl+J
- Update Status Code Definitions
- Update Non-Productive Code Definitions
- Production Warehouse Export

**Job Status**

Job Number ?  
 11381

Cancel Ok

Select **Code**, **Source/Cause code**, **Comments**, **Cost Center**, and **ADD**.

Set/Review Job Status

Job Number: 11381Title: Daily Cards BNot Scheduled

Customer: 50093Name: Claude's Test CustomerSave Changes

Due Date: 9/18/2014☐ Job is on Hold

Job DetailsOpen Status CodesClosed Status CodesSchedule OverviewComponent TrackingMaterialBuy OutsShipping

Terms : See Above  
Contact : Claude  
Phone : 415-462-7238  
New job. No previous job entered  
Job Entry Date : 9/16/2014  
Quote : 11420.99  
Quantity : 10,000  
Quote Entry Date : 9/16/2014  
Quoted Price : \$541.00  
Customer Order No : N/A  
Requested Ship Date : 9/18/2014  
Promised Ship Date : N/A  
Expected Job In Date : N/A  
Sales Rep : Claude  
Planner : Lisa Jones  
Estimator : Claude  
CSR : House Account

Add New Code

CodeDescription (add comments below if desired)Hold Code

HOL

Source/Cause of Status code: ☐ Internal☒ Customer☐ VendorExpected close date: 9/17/2014

Comments:  
New Files

Cost Center: 10: CUSTOMER SERVICE

Add

CancelSearch

Schedule DetailsvWork Order

Set/Review Job Status

Job Number: 11381Title: Daily Cards BOn Hold


Customer: 50093Name: Claude's Test CustomerSave Changes

Due Date: 9/18/2014☒ Job is on Hold

Job DetailsOpen Status CodesClosed Status CodesSchedule OverviewComponent TrackingMaterialBuy OutsShipping

|                                                              |   |           |               |       |          |               |  |
|--------------------------------------------------------------|---|-----------|---------------|-------|----------|---------------|--|
| Status: Unscheduled (Count=4100)                             |   |           |               |       |          |               |  |
| <input checked="" type="checkbox"/> On Hold: No (Count=4072) |   |           |               |       |          |               |  |
| <input type="checkbox"/> On Hold: Yes (Count=28)             |   |           |               |       |          |               |  |
| 11381                                                        | ? | 9/18/2014 | Daily Cards B | 10000 | 11420.99 | House Account |  |
| 9033                                                         | ? | 4/4/2013  | Job 3         | 1     | 8760     | Opal Richey   |  |

MRSchedulerExtended

 11381 is on hold. Schedule anyway?

OK

Cancel

**Remove Hold – Job Status, Open Status Codes, select Close and Save Changes.**

Set/Review Job Status

Job Number: 11381

Title: Daily Cards B

On Hold

Customer: 50093

Name: Claude's Test Customer

Save Changes

Due Date: 9/18/2014

☒ Job is on Hold

☐ Job needs to be Re-Scheduled

Job Details

Open Status Codes

Closed Status Codes

Schedule Overview

Component Tracking

Material

Buy Outs

Shipping

| Close                               | Code | Description      | Set By | Date Set              | Caused By | Exp Close | Cost Center      | Comment            | Route |
|-------------------------------------|------|------------------|--------|-----------------------|-----------|-----------|------------------|--------------------|-------|
| <input checked="" type="checkbox"/> | HOL  | Hold Code        | LS     | 9/17/2014 10:21:57 AM | Customer  | 9/17/2014 | CUSTOMER SERVICE | New Files          |       |
| <input type="checkbox"/>            | N/A  | 04 Not Scheduled | LS     | 9/16/2014 1:27:21 PM  | Internal  | N/A       | N/A              | UnscheduleJobRoute |       |

**Job Scheduling – Select Production Scheduling and Schedule- Un-Schedule.**

EFI PrintStream

My Page

Production Scheduling

Cost Centers

Review and Report

Options and Utilities

Schedule Board

Refresh Schedule Data

Process >

Use:SE

All Cost Centers

WIP Only

Cost Centers >

Start Date 9/17/2014

End Date 9/17/2014

Date Range >

Only My Jobs

Include Closed Activities

Include Tentative Jobs

Load Options >

Drop-Calendar

Schedule-Unschedule

Jobs >

If Schedule-UnSchedule is not displayed, contact the System Administrator. Only Master Schedulers will be allowed to access job schedules. Master Scheduler is set-up in security events Menus and Users/Security/Scheduling Admin.

Sub Roles

Action

Sub Roles

Sec. Events

Security Events

Save Permanent Print Templates

Scheduled Purchasing

Scheduler

MileStonePromisedDate

MileStoneScheduledDate

MRCloseJob

MRCommitted

MRFinite

MROverload

MRPostAndRoll

MRScheduler

MRTentative

MRUnschedule

MRUtilities

PromisedDate

SchedulerAdmin

Segment Tracking

Shipping

Spec Manager

Streamline.Fulfillment.WIPTracking

System Roles

Role

Select All

Deselect All

| Security Event | Program | Read | Write | Update | Delete | Author | Admin |
|----------------|---------|------|-------|--------|--------|--------|-------|
|----------------|---------|------|-------|--------|--------|--------|-------|

Cancel

Save

## Open a Job to Schedule

The job can be opened by double-clicking or using the **Select Job** option and pressing the **Enter** key on the keyboard.

All jobs created in any Printstream order entry program will list under **Unscheduled** until they are scheduled or until they are invoiced, and their invoice batch is posted.

**Tentative** schedules can be overwritten by committed schedules and will appear in this list.

**Scheduled** jobs have been given a committed schedule.

**Reschedule Required** jobs have had changes posted since they were scheduled and *might need rescheduling*.

| Job Number                             | On Hold | Delivery Date | Description                   | Accepted Qty | Quote Number | CSR           | Status Code |
|----------------------------------------|---------|---------------|-------------------------------|--------------|--------------|---------------|-------------|
| Status: Committed (Count=437)          |         |               |                               |              |              |               |             |
| Status: Reschedule Required (Count=57) |         |               |                               |              |              |               |             |
| Status: Tentative (Count=18)           |         |               |                               |              |              |               |             |
| Status: Unscheduled (Count=4103)       |         |               |                               |              |              |               |             |
| Olc: ? (Count=4055)                    |         |               |                               |              |              |               |             |
| Olc: No (Count=40)                     |         |               |                               |              |              |               |             |
| Olc: Yes (Count=0)                     |         |               |                               |              |              |               |             |
| 11385                                  | No      | 9/18/2014     | Copy of Print & Mail Campaign | 30000        | 11424.99     | House Account |             |
| 9112                                   | No      | 7/1/2013      | Carton Pack Test              | 6000         | 8668.99      | DMM CSRGuy1   |             |
| 7881                                   | No      | 10/21/2011    | Test                          | 20000        | 7429.99      | House Account |             |
| 7880                                   | No      | 10/21/2011    | 102111 DMM Insert             | 50000        | 7428.99      | DMM CSRGuy1   |             |
| 2222                                   | No      | 1/25/2009     | Copy of Some testing          | 25000        | 2821.99      | Chuck Bannon  |             |
| 2197                                   | No      | 1/30/2009     | Copy of CT test book          | 10000        | 2780         |               |             |
| 2182                                   | No      | 12/31/2008    | Copy of some testing          | 10000        | 2740.99      | Opal Richey   |             |
| 2180                                   | No      | 12/24/2008    | Test for FG Invoicing         | 10000        | 2738.99      | DMM CSRGuy1   |             |

To schedule a job, select the job number and then double-click the desired job number. Or using the **Select Job** option, enter the job number and press the **Enter** key on the keyboard.

Unscheduled

9/18/2014 - 9/18/2014, Qty: 30000

Load

Select an Existing or New Route

(new)

Combine Identical Activities

Promised Dates

Scheduled Dates

Options and Restore Steps

Hold

Schedule

Start Scheduling at:

9/18/2014 7:00:00 AM

Schedule to Plan

Force Schedule to Complete by:

12/16/2014 11:00:00 PM

Due Date (Reverse) Schedule

Observe Promised Dates

Allow Overload

Resource(s): 1 CC Max

Set All

Preview Schedule

Ok As Is

Publish

Save

Unschedule

Work Ticket

Refresh Columns

Show WIP

Show Structure

Fit Columns

Estimated Job loaded for Scheduling

| Component  | Task                    | Cost Center                       | Activity Code | Start DTM | End DTM | Promised Dtm | Scheduled Hours | Qty   | Use |
|------------|-------------------------|-----------------------------------|---------------|-----------|---------|--------------|-----------------|-------|-----|
|            | ADDRESS STANDARDIZATION | PROGRAMMING [01-0100 code:340]    | 34036         |           |         |              |                 | 30000 | 0   |
|            | BARCODE QUALIFY         | PROGRAMMING [01-0100 code:340]    | 34038         |           |         |              |                 | 30000 | 0   |
| Order form | Pre Flight              | ELEC. PREPRESS [01-0100 code:430] | 43010         |           |         |              |                 | 1     | 0   |
| Order form | Doc File Setup          | ELEC. PREPRESS [01-0100 code:430] | 43010         |           |         |              |                 | 1     | 0   |
| Coupons    | Pre Flight              | ELEC. PREPRESS [01-0100 code:430] | 43010         |           |         |              |                 | 1     | 0   |
| Coupons    | Doc File Setup          | ELEC. PREPRESS [01-0100 code:430] | 43010         |           |         |              |                 | 1     | 0   |
| Letter     | Pre Flight              | ELEC. PREPRESS [01-0100 code:430] | 43010         |           |         |              |                 | 1     | 0   |
| Letter     | Doc File Setup          | ELEC. PREPRESS [01-0100 code:430] | 43010         |           |         |              |                 | 1     | 0   |
| Pricelist  | Platemaking             | PLATEMAKING [01-0100 code:425]    | 42510         |           |         |              |                 | 4     | 0   |
| Order form | Platemaking             | PLATEMAKING [01-0100 code:425]    | 42510         |           |         |              |                 | 4     | 0   |
| Coupons    | Platemaking             | PLATEMAKING [01-0100 code:425]    | 42510         |           |         |              |                 | 0     | 0   |

Task Selector

Pre Press

Press

Finish / Bind

None

Expanded

Expanded

Expanded

Expand Packages for Scheduling

Select from Complete Job

Select from Unscheduled Task Quantities

| Selected                            | Name       | Number | Item Type   | Quantity | Route | Due Date  |
|-------------------------------------|------------|--------|-------------|----------|-------|-----------|
| <input checked="" type="checkbox"/> | RX12 Env   |        | 1 Component | 30000    |       |           |
| <input checked="" type="checkbox"/> | BRE        |        | 1 Component | 30000    |       |           |
| <input checked="" type="checkbox"/> | Coupons    |        | 1 Component | 30000    |       |           |
| <input checked="" type="checkbox"/> | Letter     |        | 1 Component | 30000    |       |           |
| <input checked="" type="checkbox"/> | Order form |        | 1 Component | 30000    |       |           |
| <input checked="" type="checkbox"/> | Pricelist  |        | 1 Component | 30000    |       |           |
| <input checked="" type="checkbox"/> | PART 1     |        | 1 Drop      | 15000    |       | 9/24/2014 |
| <input checked="" type="checkbox"/> | PART 2     |        | 2 Drop      | 15000    |       | 9/27/2014 |
| <input checked="" type="checkbox"/> | Pack 1     |        | 1 Package   | 15000    |       |           |
| <input checked="" type="checkbox"/> | Pack 2     |        | 2 Package   | 15000    |       |           |

## Settings and Controls

Unscheduled  
9/18/2014->9/18/2014, Qty:30000

Provides Status (Un-Scheduled, Committed, Tentative or Reschedule Required) First and Last Mail Date and quoted Quantity on the job.

## Load

Select an Existing or New Route  
(new)

**Select an Existing or New Route** - Select to create a New Route or view an Existing Route on the job.

☒ Combine Identical Activities

**Combine Identical Activities** - Select then Preview. This will combine all identical activities for the job rather than activities for each component.

☒ Promised Dates

**Promise Dates** - Promise dates are entered in Mail Estimating. Promise dates are used as a starting point for scheduling. These dates do not commit the schedule in any way.

☐ Scheduled Dates

**Scheduled Dates** - This option will maintain the last scheduled date for each job step using the promise date fields when creating an additional route.

Options and Restore Steps

Opens and restores closed job steps. This option is used when a job step is accidentally closed and needs to be restored for additional processing.

Hold Route

Places route on hold - not the job - only a route within the job schedule

## Schedule

Start Scheduling at:  
9/24/2014 8:00:00 AM

**Start Scheduling at** - Select a Starting Date and Time. This will write a future schedule for the job. Time will determine shift definition.

☒ Schedule to Plan

**Schedule to Plan** - This option will overbook Cost Centers regardless of the number of resources and scheduled jobs. If the first job step is scheduled and Schedule to Plan is checked, the system will automatically start the next process right after the first step completes. It will ignore already taken resources on that day and shift. The option will not schedule a process on a day/shift that does not have at least one resource.

Start Scheduling at:  
9/9/2014 7:00:00 AM  
☒ Schedule to Plan  
☒ Force Schedule to Complete by:  
9/12/2014 11:00:00 PM

**Force Schedule to Complete by** - Using Start Scheduling at, enter a Date and Time, also enter a Date and Time under **Force to Complete by**. The system will automatically increase number of resources per job step to schedule the job. This option will NOT overload Cost Centers it is design to provide the best possible schedule based on available resources and capacity per shift and day.

**Due Date (Reverse) Schedule** - Allows for backwards scheduling. Using the Start Scheduling at option, enter a date and time. The system will start scheduling the last process on the job and backwards. This option will provide information on when the first job step begins in order to meet the due date.

**Note** Using this option can result in scheduling processes in the past.

☒ Observe Promised Dates

**Observe Promise Dates** - This option prevents any job step from being scheduled prior to the Promised Date. Note the scheduler cannot enter promise dates; these are entered in Mail Estimating.

☒ Allow Overload

**Allow Overload** - Overloads Cost Centers that contain more than one resource when capacity has been exceeded for a day/shift.

**Resources** - This option allows for additional resources to be set for all job steps when scheduling by default each job step has one resource allocated.

Preview Schedule

**Preview Schedule** - Select your method, define your dates and time, and select **Preview**. This is a look at a possible schedule for the job. Preview does not commit the job it is only a view of possibilities.

Ok As Is

**Ok As Is** - This will write the schedule as it appears. If there are multiple schedulers, this could result in resource overload. If the job has already been committed and you do not wish to make any scheduling changes use this option; Only available in Rescheduled Required

## Publish

**Committed + Save** - Schedules the job as Live taking available resources based on day, shift, and capacity.

**Tentative + Save** - Schedules the job as Tentative also taking available resources based on day, shift, and capacity.

The image shows a set of buttons for job scheduling. At the top is a 'Publish' button. Below it are 'Save' and 'Unschedule' buttons. At the bottom are 'Committed' and 'Tentative' buttons.

**Un-schedule** - Select a route and Un-schedule. This option un-schedules a single route, not the job.

### Examples of Job Scheduling:

Jobs can be scheduled as a whole or broken into multiple routes. All job processes will load into scheduling if the Cost Center has been activated and has capacity set-up.

### One Route Job Example:

This screenshot shows the 'Settings and Controls' panel on the left and a 'Task List' on the right. In the 'Schedule' section, the 'Start Date' is set to 3/30/2015 and the 'Start Time' is 7:00:00 AM. The 'Task List' shows a single route for a job with the following tasks:

| Task                                     | Activity Code                               | Cost Center | Promised Dtm       | Machine | Start Dtm | End Dtm | Qty   | Estimated Hours | Use |
|------------------------------------------|---------------------------------------------|-------------|--------------------|---------|-----------|---------|-------|-----------------|-----|
| Brochure - Planning                      | 42510 [PLATEMAKING [01-0100 code-425]]      |             | 3/30/2015 12:00 AM |         |           |         | 8     | 02:30           | 0   |
| Brochure - Ca...                         | 50000 PRINT ADMIN [01-0100 code-500]        |             |                    | 3537    | 03:06     |         | 8     |                 |     |
| Brochure - Printing                      | 52519 640 HEIDELBERG [01-0100 code-525]     |             | 3/30/2015 12:00 AM |         |           |         | 5733  | 04:45           | 0   |
| Brochure - MBO Fold 01                   | 58015 MBO FOLDER (PRESS) [01-0100 code-580] |             | 3/30/2015 12:00 AM |         |           |         | 20000 | 02:36           | 0   |
| Letter - FOLD 8.5x11/14 SIZE             | 74011 FOLDER [01-0100 code-740]             |             |                    |         |           |         | 20000 | 04:25           | 0   |
| #10 Envelope - INKJET UP TO 6x9 ENVELOPE | 81011 INKJET [01-0100 code-810]             |             |                    |         |           |         | 20000 | 03:30           | 0   |
| INERT, METER, SORT #10 3pcs              | 83013 INserter [01-0100 code-830]           |             |                    |         |           |         | 20000 | 09:00           | 0   |

This screenshot shows the 'Settings and Controls' panel on the left and a 'Task List' on the right. In the 'Schedule' section, the 'Start Date' is set to 3/30/2015 and the 'Start Time' is 7:00:00 AM. The 'Task List' shows multiple routes for a job with the following tasks:

| Task                                     | Activity Code                               | Cost Center | Promised Dtm       | Machine | Start Dtm          | End Dtm            | Qty   | Estimated Hours | Use |
|------------------------------------------|---------------------------------------------|-------------|--------------------|---------|--------------------|--------------------|-------|-----------------|-----|
| Brochure - Planning                      | 42510 [PLATEMAKING [01-0100 code-425]]      |             | 3/30/2015 12:00 AM |         | 3/30/2015 6:00 AM  | 3/30/2015 10:00 AM | 8     | 02:30           | 0   |
| Brochure - Centura Glass Bk-100#         | 50000 PRINT ADMIN [01-0100 code-500]        |             |                    | 3537    | 10:06              |                    | 8     |                 |     |
| Brochure - Printing                      | 52519 640 HEIDELBERG [01-0100 code-525]     |             | 3/30/2015 12:00 AM |         | 3/30/2015 10:08 AM | 3/30/2015 2:52 PM  | 5733  | 04:45           | 0   |
| Brochure - MBO Fold 01                   | 58015 MBO FOLDER (PRESS) [01-0100 code-580] |             | 3/30/2015 12:00 AM |         | 3/30/2015 2:54 PM  | 3/4/2015 9:30 AM   | 20000 | 02:36           | 0   |
| Letter - FOLD 8.5x11/14 SIZE             | 74011 FOLDER [01-0100 code-740]             |             |                    |         | 3/30/2015 10:01 AM | 3/30/2015 2:26 PM  | 20000 | 04:25           | 0   |
| #10 Envelope - INKJET UP TO 6x9 ENVELOPE | 81011 INKJET [01-0100 code-810]             |             |                    |         | 3/30/2015 10:01 AM | 3/30/2015 1:31 PM  | 20000 | 03:30           | 0   |
| INERT, METER, SORT #10 3pcs              | 83013 INserter [01-0100 code-830]           |             |                    |         | 3/4/2015 9:31 AM   | 3/5/2015 10:31 AM  | 20000 | 09:00           | 0   |



Name the Route/Ok

Select the Route Drop Date /Ok

**Example Job Schedule with Multiple Routes:**

| Component          | Task                         | Activity Code                               | Cost Center                          | Promised Dtm | Start DTM | End DTM | Qty   | Estimated Hours | Use |
|--------------------|------------------------------|---------------------------------------------|--------------------------------------|--------------|-----------|---------|-------|-----------------|-----|
| Brochure           | Platemaking                  |                                             | 42510 PLATEMAKING [01-0100 code:425] |              |           |         | 8     | 02:00           | 0   |
| Brochure - Cent... | Paper Stock                  | 50000 [PRINT ADMIN [01-0100 code:500]       |                                      |              |           |         | 3537  | 00:36           | 0   |
| Brochure           | Printing                     | 52519 640 HEIDELBERG [01-0100 code:525]     |                                      |              |           |         | 5733  | 04:45           | 0   |
| Brochure           | MBO Fold 01                  | 58015 MBO FOLDER (PRESS) [01-0100 code:580] |                                      |              |           |         | 20000 | 02:36           | 0   |
| Letter             | FOLD 8.5x11/4 SIZE           | 74011 FOLDER [01-0100 code:740]             |                                      |              |           |         | 20000 | 04:25           | 0   |
| #10 Envelope       | INKJET UP TO 6x9 ENVELOPE    | 81011 INKJET [01-0100 code:810]             |                                      |              |           |         | 1     | 00:06           | 0   |
|                    | INSERT, METER, SORT #10 3pcs | 83013 INSERTER [01-0100 code:830]           |                                      |              |           |         | 20000 | 09:00           | 0   |

**Right-click Options** – These options are helpful when creating multiple routes for a single job.**Available for Scheduling** – Job step can be scheduled.**Remove** – Allows user to remove job step. The removed step does not impact the job in estimating on the scheduling portion. This could be a step that is not going to be scheduled or will be scheduled in another route.**Remove From Here to Top** – Allows multiple steps to be removed from the selected step to the top of the grid.**Remove From Here to Bottom** – Allows multiple steps to remove from the selected step to the bottom of the grid.**Modify Task** – Allows a step to be split and sent to on another Cost Center.**Set Qty/Hour** – Allows an override of the run speed for the selected step.**Combine block into a single Task based on the selected activity** – This option will allow an entire BLOCK of steps to combine together for scheduling a single line. This will display one line in scheduling for the block containing an overall total qty and total hours combined together. Mainly used with Data Processing activities.**Add Activity** – Activity codes can be added to the job schedule. For example: the job was quoted for one process, but it will be processed in production using a different process. By adding the correct activity, this will ensure a more accurate schedule. This has no impact on the quoted job in estimating.**Close Tasks** – Closes Job Steps.**Add Special Event** – If special events are set-up in Master Files Reports/ Report #625. These events can be added to the job schedule. Special events are no more than milestones that provide the scheduler a starting point. In most cases these events are selected at the job level and will flow into scheduling for example (Files Due, Material Due, and Proof Due).**Review Modifiers** – If a process has modifiers, this option will display the modifier on the process. Modifiers can increase and decrease run speeds depending on the answers.

This example represents a job with 2 routes - a Print route and a Mail route.

Using the right-click options, remove all mail processes either by **Remove individually** or **Remove From Here to Bottom**.

The screenshot shows the 'Work Ticket' interface with a table of tasks. A right-click context menu is open over the 'Letter' task, showing options like 'Available for Scheduling', 'Remove', 'Remove From Here to Top', 'Remove From Here to Bottom', 'Move to Top', 'Move to Bottom', 'Modify Task', 'Set Qty / Hour', 'Combine block into a single Task based on the selected activity', 'Add Activity', 'Close Task', 'Add Special Event', and 'Review Modifiers'.

| Component          | Task                         | Activity Code                               | Cost Center | Promised Dtm | Start DTM | End DTM | Qty   | Estimated Hours | Use |
|--------------------|------------------------------|---------------------------------------------|-------------|--------------|-----------|---------|-------|-----------------|-----|
| Brochure - Cent... | Paper Stock                  | 50000 PRINT ADMIN [01-0100 code:500]        |             |              |           |         | 3537  | 00:06           | 0   |
| Brochure           | Printing                     | 52519 640 HEIDELBERG [01-0100 code:525]     |             |              |           |         | 5733  | 04:45           | 0   |
| Brochure           | MBO Fold 01                  | 58015 MBO FOLDER (PRESS) [01-0100 code:580] |             |              |           |         | 20000 | 02:36           | 0   |
| Letter             | FOLD 8.5x11/14 SIZE          | 74011 FOLDER [01-0100 code:740]             |             |              |           |         | 20000 | 04:25           | 0   |
| #10 Envelope       | INKJET UP TO 6x9 ENVELOPE    | 81011 INKJET [01-0100 code:810]             |             |              |           |         | 1     | 00:06           | 0   |
|                    | INSERT, METER, SORT #10 3pcs | 83013 INSERTER [01-0100 code:830]           |             |              |           |         | 20000 | 09:00           | 0   |

Enter the **Start Scheduling Date and Time/Preview/ Save/** and Enter a Route Name.

The screenshot shows the 'Work Ticket' interface with the 'Schedule' button highlighted in the left sidebar. A 'Scheduling a Route' dialog box is open, showing the 'Update route description' field with the text 'Route 1, Press'.

| Component                        | Task        | Activity Code                               | Cost Center | Promised Dtm | Start DTM         | End DTM           | Qty   | Estimated Hours | Use |
|----------------------------------|-------------|---------------------------------------------|-------------|--------------|-------------------|-------------------|-------|-----------------|-----|
| Brochure - Centura Gloss BK 100# | Paper Stock | 50000 PRINT ADMIN [01-0100 code:500]        |             |              | 3/3/2015 8:00 AM  | 3/3/2015 8:06 AM  | 3537  | 00:06           | 1   |
| Brochure                         | Printing    | 52519 640 HEIDELBERG [01-0100 code:525]     |             |              | 3/3/2015 2:56 PM  | 3/4/2015 11:40 AM | 5733  | 04:45           | 0   |
| Brochure                         | MBO Fold 01 | 58015 MBO FOLDER (PRESS) [01-0100 code:580] |             |              | 3/4/2015 11:41 AM | 3/4/2015 2:17 PM  | 20000 | 02:36           | 1   |

Select the **Route Drop Date**. This is the date the scheduler selects for the expected completion of the route.

The screenshot shows the 'Route Drop Date' dialog box, which displays a calendar for March and April 2015. The date 3/3/2015 is highlighted in red, and the 'Today' label is also present.

| March, 2015 |     |     |     |     |     |     | April, 2015 |     |     |     |     |     |     |
|-------------|-----|-----|-----|-----|-----|-----|-------------|-----|-----|-----|-----|-----|-----|
| Sun         | Mon | Tue | Wed | Thu | Fri | Sat | Sun         | Mon | Tue | Wed | Thu | Fri | Sat |
| 22          | 23  | 24  | 25  | 26  | 27  | 28  |             |     |     | 1   | 2   | 3   | 4   |
| 1           | 2   | 3   | 4   | 5   | 6   | 7   | 5           | 6   | 7   | 8   | 9   | 10  | 11  |
| 8           | 9   | 10  | 11  | 12  | 13  | 14  | 12          | 13  | 14  | 15  | 16  | 17  | 18  |
| 15          | 16  | 17  | 18  | 19  | 20  | 21  | 19          | 20  | 21  | 22  | 23  | 24  | 25  |
| 22          | 23  | 24  | 25  | 26  | 27  | 28  | 26          | 27  | 28  | 29  | 30  | 1   | 2   |
| 29          | 30  | 31  |     |     |     |     | 3           | 4   | 5   | 6   | 7   | 8   | 9   |

Today: 3/3/2015



Notice the example job has two routes scheduled.

| Component | Task                         | Activity Code | Cost Center                    | Promised Dtm | Machine | Start DTM         | End DTM           | Qty   | Estimated Hours | Use | Ready |
|-----------|------------------------------|---------------|--------------------------------|--------------|---------|-------------------|-------------------|-------|-----------------|-----|-------|
| Brochure  | Platemaking                  | 42510         | PLATEMAKING [01-0100 code:425] |              |         | 3/3/2015 6:00 AM  | 3/3/2015 10:00 AM | 8     | 02:00           | 1   | ✓     |
| Letter    | FOLD 8.5x11/14 SIZE          | 74011         | FOLDER [01-0100 code:740]      |              |         | 3/3/2015 10:01 AM | 3/3/2015 2:25 PM  | 20000 | 04:24           | 1   | ✓     |
|           | INSERT, METER, SORT #10 3pcs | 83013         | INSERTER [01-0100 code:830]    |              |         | 3/3/2015 2:27 PM  | 3/4/2015 3:24 PM  | 20000 | 09:00           | 1   | ✗     |

Notes

By default, each job step gets one resource (USE), and can be edited to reduce scheduled time.

Qty. can be edited and split into separate routes.

Any part of a job including qty's can be scheduled as a route. For example: inserting 20,000 can be broken into routes by editing the qty and creating routes. Each time a new route is created, the schedule will continue to load remaining unscheduled processes along with qty's.

Routes can be opened and rescheduled or unscheduled.

Routes can be placed on Hold. This will not prevent the job from being worked on in Shop Floor

**Task Selector** – Another option for creating a job schedule using Components, Drops or Packages.

In the example below, the job is factored for all Pre-Press or Data, Components and Finishing steps associated with the Brochure component. Only these activities will load for scheduling.

The user has the option to choose job steps listed for **Pre-Press**, **Press** and **Finishing Bindery** using All, None or Factor. The job steps will load based on the selection and will allow a route to be created. Factor will only load job steps associated with the above selections meaning Component, Drop or Package.

1. Place a check on how the job route is going to be created and then choose one of the options in each of the categories of the TASK SELECTOR.
2. Choose Select from Complete Job.
3. Enter Starting Dates and Time.
4. Preview /Save.
5. Name the Route and Select the Drop Date.

| Component                        | Task        | Activity Code | Cost Center                           | Promised Dtm | Machine | Start DTM         | End DTM           | Qty   | Estimated Hours | Use | Ready |
|----------------------------------|-------------|---------------|---------------------------------------|--------------|---------|-------------------|-------------------|-------|-----------------|-----|-------|
| Brochure                         | Platemaking | 42510         | PLATEMAKING [01-0100 code:425]        |              |         | 3/9/2015 8:00 AM  | 3/9/2015 10:00 AM | 8     | 02:00           | 1   | ✓     |
| Brochure - Centura Gloss BK 100# | Paper Stock | 50000         | PRINT ADMIN [01-0100 code:500]        |              |         | 3/9/2015 10:01 AM | 3/9/2015 10:07 AM | 3537  | 00:06           | 1   | ✓     |
| Brochure                         | Printing    | 52519         | 640 HEIDELBERG [01-0100 code:525]     |              |         | 3/9/2015 10:08 AM | 3/9/2015 2:56 PM  | 5733  | 04:48           | 0   | ✗     |
| Brochure                         | MBO Fold 01 | 58015         | MBO FOLDER (PRESS) [01-0100 code:580] |              |         | 3/9/2015 2:54 PM  | 3/10/2015 9:30 AM | 20000 | 02:36           | 1   | ✗     |

| Selected                            | Name          | Number | Item Type | Quantity | Route                | Due Date |
|-------------------------------------|---------------|--------|-----------|----------|----------------------|----------|
| <input type="checkbox"/>            | Pre Press     |        |           |          |                      |          |
| <input type="checkbox"/>            | Press         |        |           |          |                      |          |
| <input type="checkbox"/>            | Finish / Bind |        |           |          |                      |          |
| <input type="checkbox"/>            | #10 Envelope  | 1      | Component | 0        |                      |          |
| <input type="checkbox"/>            | BRE           | 1      | Component | 20000    |                      |          |
| <input checked="" type="checkbox"/> | Brochure      | 1      | Component | 20000    | Route 1, MR Extended |          |
| <input type="checkbox"/>            | Letter        | 1      | Component | 20000    |                      |          |
| <input type="checkbox"/>            | March Drop    | 1      | Drop      | 20000    |                      | 3/5/2015 |
| <input type="checkbox"/>            | March Pack    | 1      | Package   | 20000    |                      |          |

Multiple routes can be scheduled using the above steps by adding a New route and choosing Select from Complete Job. Only job steps will display for scheduling based on the selections made from Task Selector.

A new feature was added when scheduling by Drops, Packages or components. When you have multiple scheduled routes when adding a new route after scheduling the first one, you can see the previous selections remain checked and must be manually unchecked to begin the new route.

The screenshot shows the 'Settings and Controls' panel on the left with a red circle around the 'Select an Existing or New Route' dropdown, which is set to '(new)'. The main panel displays a table of job steps with columns: Compon..., Task, Activity Code, Cost Center, Promised Dtm, Lag Time Hours, Scheduled Hours, Start DTM, End DTM, Qty, Use, and Estimated Hours. The 'Task Selector' panel is open, showing a list of items with checkboxes. A red circle highlights the 'Selected' column header and the checked boxes for 'BRE' and 'Insert'.

| Compon... | Task           | Activity Code | Cost Center                 | Promised Dtm | Lag Time Hours | Scheduled Hours | Start DTM | End DTM | Qty   | Use | Estimated Hours |
|-----------|----------------|---------------|-----------------------------|--------------|----------------|-----------------|-----------|---------|-------|-----|-----------------|
|           | CONVERT DISK   | 34021         | PROGRAMMING [01-0100 c...   |              |                |                 |           |         | 1     | 0   | 01:00           |
|           | MERGE/PURGE    | 34033         | PROGRAMMING [01-0100 c...   |              |                |                 |           |         | 10... | 0   | 00:40           |
|           | COUNTS REPO... | 34061         | PROGRAMMING [01-0100 c...   |              |                |                 |           |         | 10... | 0   | 00:48           |
|           | OUTPUT TO E... | 36012         | OUTPUT DATA [01-0100 co...  |              |                |                 |           |         | 10... | 0   | 00:40           |
| #10 OE    | Platemaking    | 42510         | PLATEMAKING [01-0100 co...  |              |                |                 |           |         | 1     | 0   | 00:10           |
| #10 OE    | Pre Flight     | 43010         | ELEC. PREPRESS [01-0100 ... |              |                |                 |           |         | 1     | 0   | 00:50           |
| Letter    | Platemaking    | 42510         | PLATEMAKING [01-0100 co...  |              |                |                 |           |         | 2     | 0   | 00:30           |
| Letter    | Pre Flight     | 43010         | ELEC. PREPRESS [01-0100 ... |              |                |                 |           |         | 1     | 0   | 00:50           |
| Letter    | Pre Flight     | 43010         | ELEC. PREPRESS [01-0100 ... |              |                |                 |           |         | 1     | 0   | 01:15           |

A new option was added when you right click here to clear all selected options

The screenshot shows the 'Task Selector' panel with a list of items. A right-click context menu is open over the 'Quick Package' item, showing the 'Clear All Selected' option.

| Selected                            | Name          | Number | Item Type | Quantity |
|-------------------------------------|---------------|--------|-----------|----------|
| <input checked="" type="checkbox"/> | Quick Package |        | 1 Package | 10000    |

**Expand Packages for Bindery** – Displays Bindery finishing steps along with Package name. This option is used only with jobs containing finishing processes.

Work Ticket | Refresh Columns | Show WIP | Show Structure | Fit Columns

Task Selection loaded for Scheduling

|  | Component | Task                                  | Activity Code | Cost Center                       | Promised Dtm | Machine | Start DTM | End DTM | Qty   | Estimated Hours | Use |
|--|-----------|---------------------------------------|---------------|-----------------------------------|--------------|---------|-----------|---------|-------|-----------------|-----|
|  |           | [Pkg:Book-1] INSERT, METER, SORT ...  | 83112         | STRETCH INSERT [01-0100 code:831] |              |         |           |         | 10000 | 10:05           | 0   |
|  |           | [Pkg:Mlg-2] INSERT, METER, SORT 9x... | 83112         | STRETCH INSERT [01-0100 code:831] |              |         |           |         | 10000 | 10:05           | 0   |

Task Selector

Pre Press

AI

Non

Factor

Press

AI

Non

Factor

Finish / Bind

AI

Non

Factor

Expand Packages for Bi

Select from Complete Job

Select from Unscheduled Task Quantities

| Selected | Name    | Number | Item Type   | Quantity | Route | Due Date |
|----------|---------|--------|-------------|----------|-------|----------|
|          | 9x12    |        | 1 Component | 10000    |       |          |
|          | Booklet |        | 1 Component | 20000    |       |          |
|          | Cover   |        | 1 Component | 20000    |       |          |
|          | Letter  |        | 1 Component | 10000    |       |          |
|          | Text    |        | 1 Component | 20000    |       |          |
|          | Spring  |        | 1 Drop      | 10000    |       | 4/9/2015 |
|          | Book    |        | 1 Package   | 10000    |       |          |
|          | Mlg     |        | 2 Package   | 10000    |       |          |
|          | Booklet |        | 0 Version   | 20000    |       |          |

**Show WIP** – At any time during previewing or saving a job schedule, the Show WIP option can be selected. This will provide an overview on the current job as well as scheduled jobs and open capacity. This will allow the scheduler to get an overview on how the job is being written into scheduling.

- Yellow** – Current Jobs
- Blue** – Scheduled Jobs
- Green** – Open Capacity
- Grey** – No Capacity

Work Ticket | Refresh Columns | Show WIP | Show Structure | Fit Columns

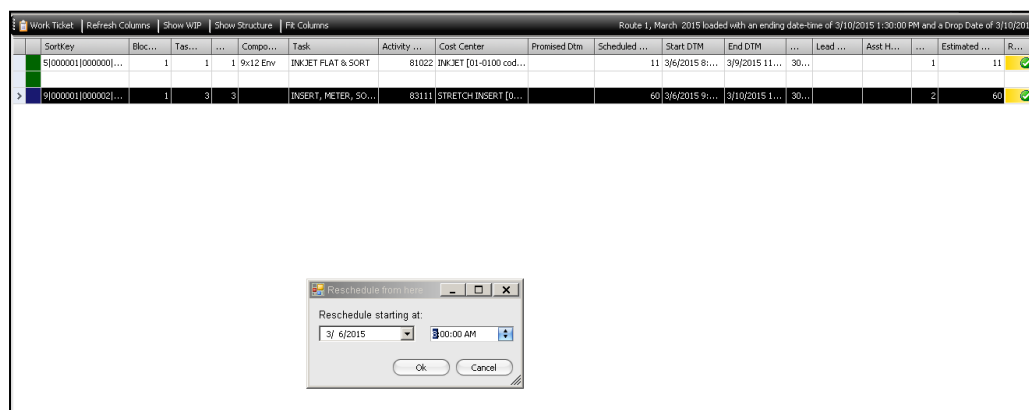
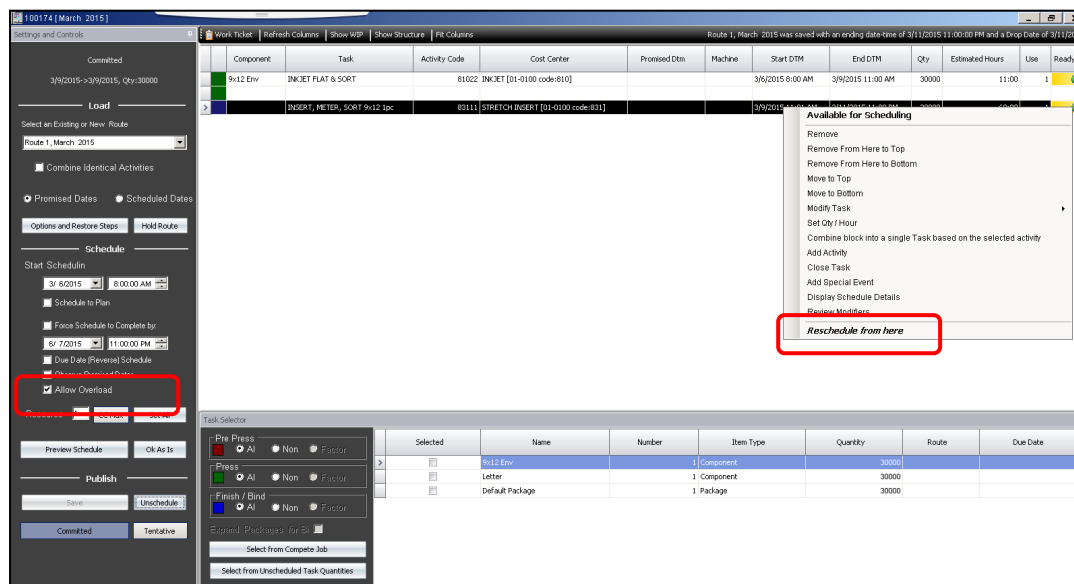
End date : 3/11/2015 12:32:00 AM - Successfully Scheduled

| Component | Task | Activity Code | Cost Center | Promised Dtm | Machine | Start DTM | End DTM          | Qty   | Estimated Hours | Use |
|-----------|------|---------------|-------------|--------------|---------|-----------|------------------|-------|-----------------|-----|
|           |      |               |             |              |         |           | 9/2015 8:08 AM   | 20000 | 00:08           | 1   |
|           |      |               |             |              |         |           | 9/2015 8:30 AM   | 2     | 00:30           | 1   |
|           |      |               |             |              |         |           | 9/2015 9:30 AM   | 6     | 01:30           | 1   |
|           |      |               |             |              |         |           | 9/2015 9:00 AM   | 4     | 01:00           | 1   |
|           |      |               |             |              |         |           | 9/2015 9:37 AM   | 5505  | 00:06           | 1   |
|           |      |               |             |              |         |           | 9/2015 1:21 PM   | 5280  | 03:43           | 1   |
|           |      |               |             |              |         |           | 9/2015 3:59 PM   | 10000 | 02:37           | 1   |
|           |      |               |             |              |         |           | 10/2015 8:26 AM  | 10000 | 00:26           | 1   |
|           |      |               |             |              |         |           | 9/2015 9:37 AM   | 11162 | 00:06           | 1   |
|           |      |               |             |              |         |           | 9/2015 12:22 PM  | 10328 | 02:44           | 1   |
|           |      |               |             |              |         |           | 10/2015 11:42 AM | 10637 | 04:47           | 0   |
|           |      |               |             |              |         |           | 10/2015 12:02 PM | 20000 | 01:32           | 1   |
|           |      |               |             |              |         |           | 9/2015 9:37 AM   | 21031 | 00:06           | 1   |
|           |      |               |             |              |         |           | 10/2015 2:26 PM  | 41206 | 08:02           | 1   |
|           |      |               |             |              |         |           | 9/2015 3:31 PM   | 10000 | 06:00           | 1   |
|           |      |               |             |              |         |           | 11/2015 12:32 AM | 10000 | 10:05           | 1   |

**Allow Overload** – This setting will allow Cost Centers to become overloaded. If a job is not meeting the expected due date, this option allows the scheduler to overload Cost Centers. When Cost Centers are overbooked, then decisions will need to be made to either reschedule other jobs or increase the number of

resources for the overloaded Cost Centers. Overloaded Cost Centers will display in RED in the Resource Loading View window in MR Extended.

1. Select **Allow Overload**.
2. Select the activity that needs to be rescheduled reschedule.
3. Select Reschedule from here.
4. Enter start scheduling date and time – Ok.
5. **Save** (Do not **Preview**).
6. Option to rename route.
7. Select **Drop Date**.



- Overload Cost Center View
- Production Scheduling
- Start Date / End Date
- WIP Only
- Schedule Board
- Resource Loading View

