

EPICOR

Production Supervisor

Kinetic User Experience Testing Guide

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Introduction

The **Production Supervisor** persona represents the user types/roles which engage with the production supervision and management functionality found in Epicor ERP. The production shop floor supervision processes within Epicor ERP allow the monitoring and management of production staff as they go about their activities on the shop floor.

High level activities and associated sub-elements identified as tasks have been defined for the Production Supervisor persona around the relevant applications in Epicor ERP with particular emphasis placed on the core applications.

It is not expected that all the activities/tasks defined for this persona will necessarily be executed by a single individual. It may be the case that full coverage for the defined activities may be provided by a number of individuals within a single organization. If a specific activity is not relevant to your organization's normal processes the activity can be skipped.

Note that a deliberate attempt has been made to limit the scope of this persona to activities that would typically be performed in the management of individuals involved in shop floor production activities as opposed to their day to day production tasks. The applications which are principally used in the production supervision processes include maintenance applications, entry applications and reports as follows:

- Job Completion/Closing
- Job Status Maintenance
- Time and Expense Entry
- Labor Edit
- Cut Lists
- Priority Dispatch
- Job Status Report
- Job Traveler
- Job Status Dashboard
- Time Phased Inquiry
- Shop Tracker
- Job Tracker
- Part Tracker

Activities and Tasks

As mentioned in the introduction, the activities and tasks defined for the persona will seek to cover the breadth of core material handling functionality within Epicor ERP. It is not the intended aim to exhaustively document all the possible activities that the persona would engage in. Where specified, tasks can be optional and will depend on each business' own standard processes if these should apply, although it is preferable that as many optional tasks as possible are completed to ensure a broader scope of each application is tested.

1. Complete/Close Job

Complete or close jobs using this application. Use the Job Completion/Closing Maintenance application for this activity.

- 1.1. Search and select job record
- 1.2. Optionally select Complete
 - 1.2.1. Optionally edit completion date
- 1.3. Optionally select Closed
 - 1.3.1. Optionally edit closed date
- 1.4. Optionally select Print Production Detail
- 1.5. Optionally select Backflush
- 1.6. Optionally review Operations grid
- 1.7. Optionally review Materials grid
- 1.8. Optionally review Co-Parts grid
- 1.9. Save Record
 - 1.9.1. Confirm record saves without error and Production Detail report prints if checkbox selected and job is closed

2. View/Change Job Status

View or change status of several jobs at once. Use the Job Status Maintenance application for this activity.

- 2.1. Search and select multiple job records
- 2.2. Optionally Firm selected or all jobs
- 2.3. Optionally Engineer selected or all jobs
- 2.4. Optionally Release selected or all jobs
- 2.5. Optionally Mass Print selected or all jobs
- 2.6. Optionally Firm selected or all jobs
- 2.7. Process selected actions
 - 2.7.1. Confirm actions completed

3. Review/Add Time Entries

Labor entries entered by production workers using the MES application can be reviewed and/or modified by supervisors using this application. New entries can also be entered if required. Use the Time and Expense Entry application for this activity.

- 3.1. Search and select Employee record
- 3.2. Select date from calendar
- 3.3. Optionally select Time Detail entry
 - 3.3.1. Recall time detail entry if changes are required
 - 3.3.1.1. Edit required fields
 - 3.3.1.2. Submit time detail entry
 - 3.3.2. Optionally edit completion date
- 3.4. Optionally add new Time Detail entry
 - 3.4.1. Select production labor type
 - 3.4.2. Enter or search and select job number record
 - 3.4.3. Select or confirm assembly sequence
 - 3.4.4. Select operation sequence
 - 3.4.5. Optionally edit quantity and time fields
 - 3.4.6. Submit time detail entry

4. Generate Labor Edit Report

View details of labor details reported through either Time and Expense Entry or MES. Use Labor Edit Report application for this activity.

- 4.1. Optionally edit Begin Date
- 4.2. Optionally edit End Date
- 4.3. Optionally use Departments filter
- 4.4. Optionally use Employees filter
- 4.5. Print Preview Report
 - 4.5.1. Confirm report preview / printed

5. Generate Cut Lists Report

List materials that relate to job operations in a given date range. Use Cut Lists Report application for this activity.

- 5.1. Optionally edit Begin Date
- 5.2. Optionally edit End Date
- 5.3. Optionally select Print Operation Comments
- 5.4. Optionally select Print Material Comments
- 5.5. Optionally use Resource Groups filter
- 5.6. Print Preview Report
 - 5.6.1. Confirm report preview / printed

6. Generate Priority Dispatch Report

View details of work schedule for shop floor employees. Use Priority Dispatch Report application for this activity.

- 6.1. Optionally edit Report Options
- 6.2. Optionally use Departments filter
- 6.3. Optionally use Resource Groups filter
- 6.4. Print Preview Report
 - 6.4.1. Confirm report preview / printed

7. Generate Job Status Report

View summary of current activity and identify potential problem jobs. Use Job Status Report application for this activity.

- 7.1. Optionally edit Due Dates On or Before
- 7.2. Optionally select Released Jobs Only
- 7.3. Optionally edit % Over Estimated Time Greater Than
- 7.4. Optionally edit Delinquent Days Greater Than
- 7.5. Optionally edit % Efficiency Less Than
- 7.6. Optionally use Customers filter
- 7.7. Optionally use Parts filter
- 7.8. Optionally use Product Groups filter
- 7.9. Optionally use Sites filter
- 7.10. Print Preview Report
 - 7.10.1. Confirm report preview / printed

8. Generate Job Traveler Report

View details of selected manufacturing jobs. Use Job Traveler Report application for this activity.

- 8.1. Select required Options
- 8.2. Optionally use Job filter
- 8.3. Optionally use Assemblies filter
- 8.4. Print Preview Report
 - 8.4.1. Confirm report preview / printed

9. Review Job Status Dashboard

Use the Job Status Dashboard to review job details including status, demand links, methods of manufacture and booked material and labor transactions. Use the Job Status Dashboard application for this activity.

- 9.1. Enter search criteria in one or more fields in Advanced Search tracker
- 9.2. Optionally review Job Status tabs
- 9.3. Optionally review Job Links
- 9.4. Optionally review Assemblies
- 9.5. Optionally review Operations
- 9.6. Optionally review Materials
- 9.7. Optionally review Labor Trans
- 9.8. Optionally review Part Transactions

10. Review Time Phase Inquiry

Use the Time Phase to view current inventory and planned receipts or usage requirements of a given part record. Use the Time Phase Inquiry application for this activity.

Enter or search and select Part record

Optionally edit Site filter

Review Inventory details

Review Time Phase grid information

Optionally show/hide Suggestions

Optionally search and select Planning Contract

11. Review Shop Tracker

Review the information about shop activity including resources, labor activity and shop warnings. Use the Shop Tracker application for this activity.

- 11.1. Optionally review Resources
- 11.2. Optionally review Who is Here
- 11.3. Optionally review Who is Not Here
- 11.4. Optionally review Active Resources
- 11.5. Optionally review Shop Warnings

12. Review Job Tracker

Review the details of a chosen job number. Use the Job Tracker application for this activity.

- 12.1. Enter or search and select Job record
- 12.2. Optionally review Job Details
- 12.3. Optionally review Shipments
- 12.4. Optionally review Miscellaneous Shipments
- 12.5. Optionally review Serial Numbers
- 12.6. Optionally review Part Locations
- 12.7. Optionally review Mfg Receipts

13. Review Part Tracker

Review the details of a chosen part number, specifically review part details and revision data. Use the Part Tracker application for this activity.

- 13.1. Enter or search and select Part record
- 13.2. Optionally review Part Details
- 13.3. Optionally review Site Details
- 13.4. Optionally review Revisions