

Dashboard Operations

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Overview

Evolution features priority driven production management tools that will give laboratories the ability to proactively manage case scheduling and tracking as the cases flow through the lab. The Management tools are designed to track case production, technician productivity, financial accounts, marketing and sales, customer service and monitor overall lab health.

Evolution dynamically monitors work in progress, pinpoints and eliminates bottlenecks, alerts staff of issues, overhead and labor costs and overall lab productivity. This process ensures that the right technician is working on the right case at the right time.

Manager Dashboard

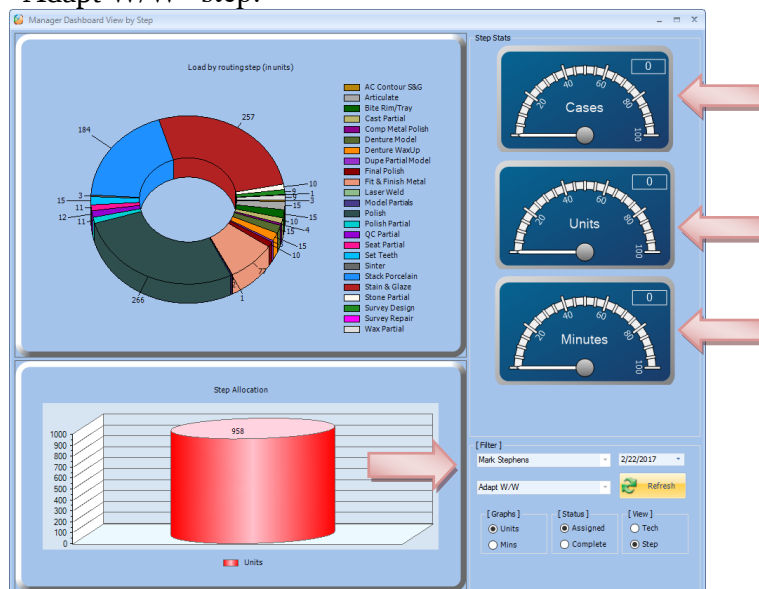
This is accessed from **Manager** under the **Management** menu.

This dashboard is intended to be used by specific managers to see loads, by tech or by step, for what has been Assigned and Completed “today.” The Assigned data should “drop off” during the course of the day and the Completed data will “build up.” The goal for the manager is that the Assigned data goes to zero (0) by the end of the day.

When the form is opened by a Manager, it defaults to the load for that manager. The default when opened is “Units Assigned by Step” for that manager. The pie chart and bar chart on the left side represent “total units assigned by step.” The ‘Step Stats’ dials on the right represent counts in Cases, Units and Minutes for the step displayed.

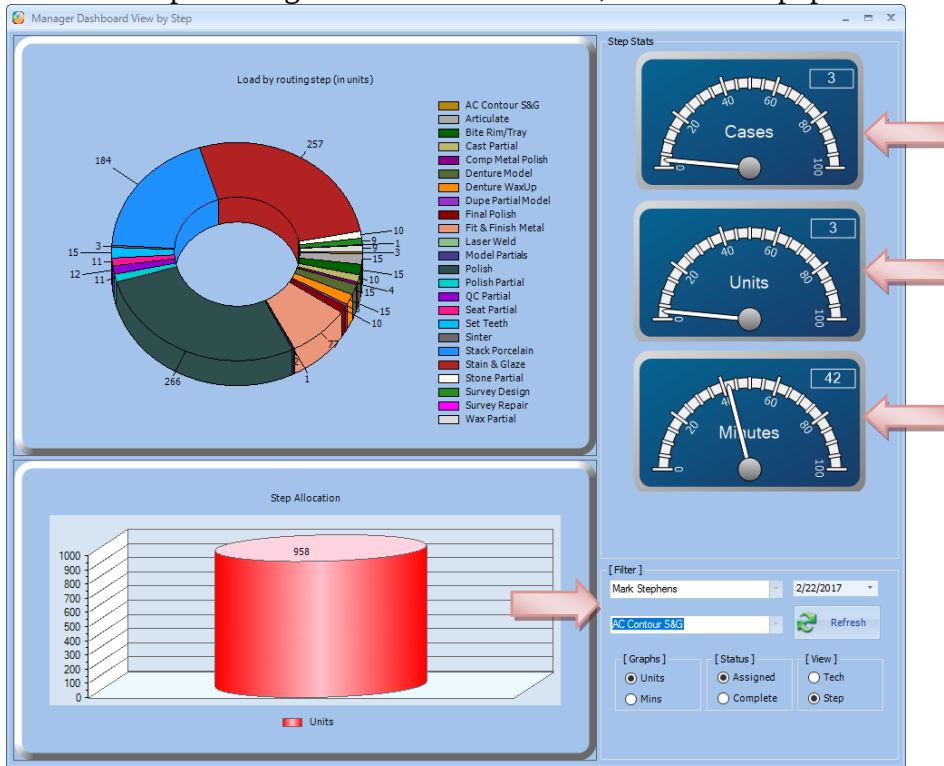
All loads for “Assigned” represent uncompleted work for “the selected date and prior dates.” This is so the manager knows the entire load for his department “today,” which includes uncompleted work from prior days. Data for Hold Cases is **NOT** included.

When this form was opened for Mark Stephens, his techs have no cases assigned for the “Adapt W/W” step:

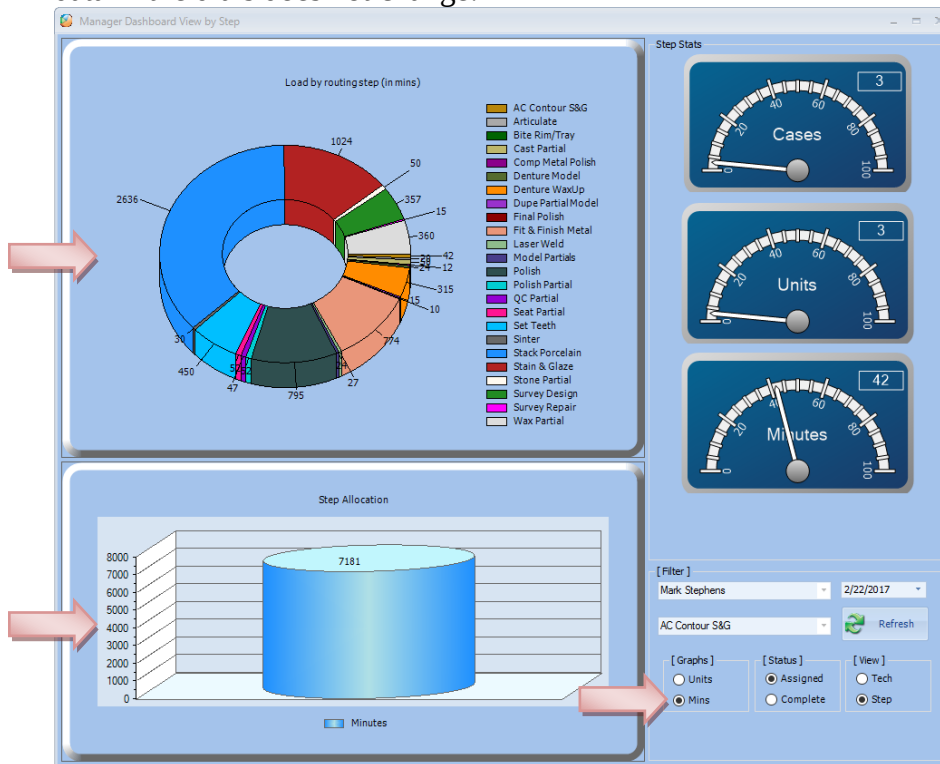


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But if the step is changed to one that has loads, the dials are populated:

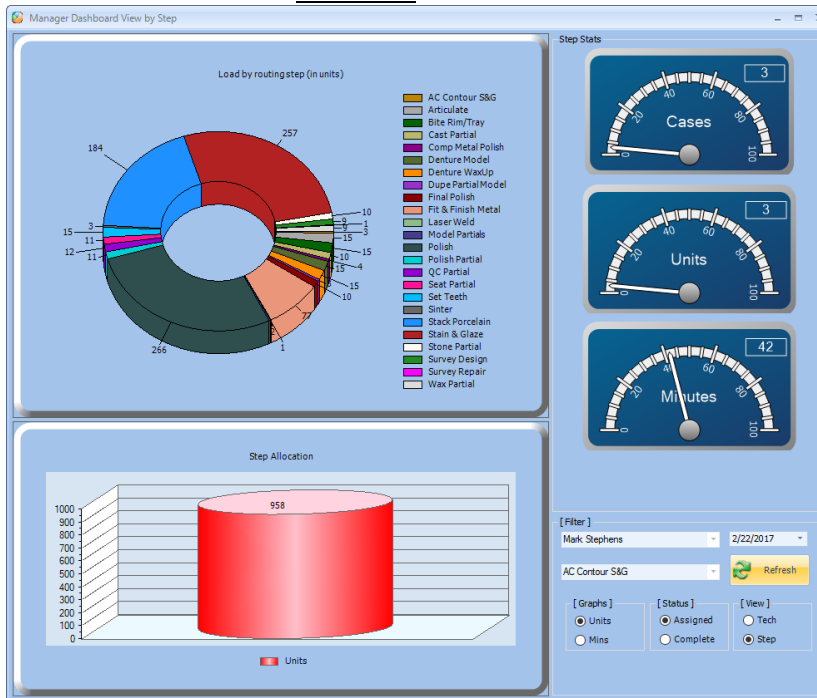


If the [Graphs] option is changed to “Mins,” then the pie chart and bar chart on the left now reflect the same data as before, but now in Minutes instead of Units. Notice that the data in the dials does not change:

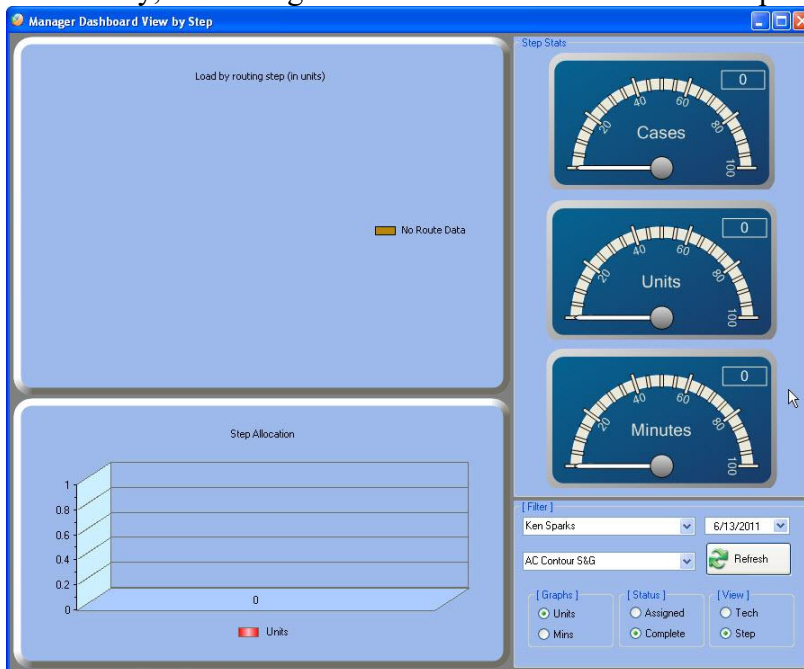


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If the Evolution system is set to schedule “By Tech” for any or all steps, then looking at Assigned data “by Tech” is applicable. Now the left-side data represents Units or Minutes “pre-assigned to specific techs,” and the dials on the right represent Cases, Units and Minutes totals for each tech:



When the [Status] option is changed to “Complete,” the dashboard data now represents all work Completed “Today” by this manager’s technicians. It does not matter what dates the cases had been scheduled for, this is the work done “today.” At the beginning of each day, the “Assigned” data will be full and the “Complete” data will be empty:

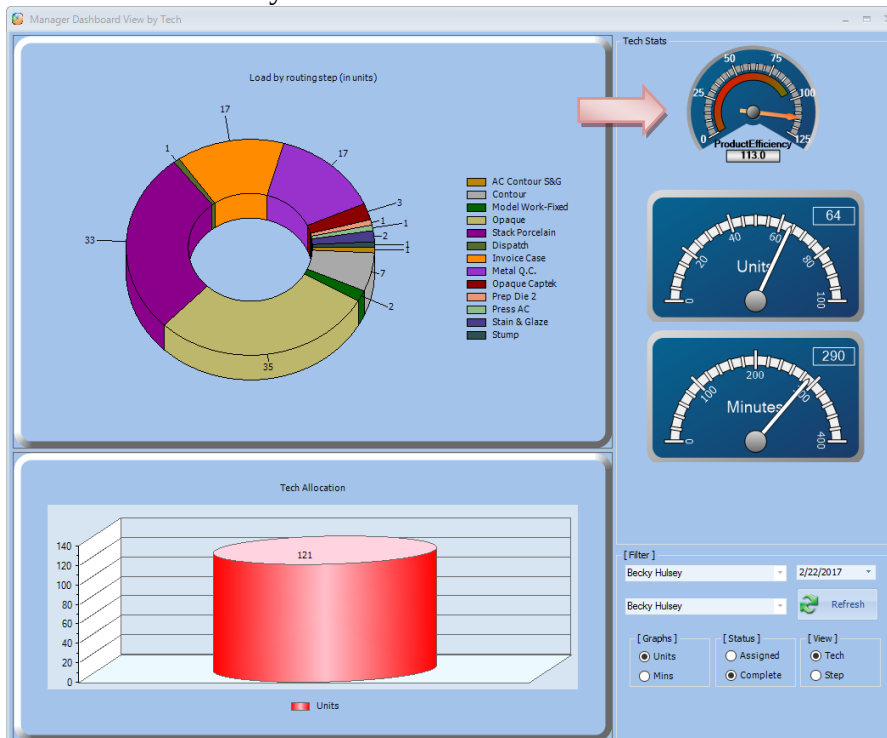


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After this manager's technicians have completed some work for the day, this will start to populate:



When looking at “Complete data by tech” for the date selected, the upper dial becomes the current Efficiency for the selected tech.



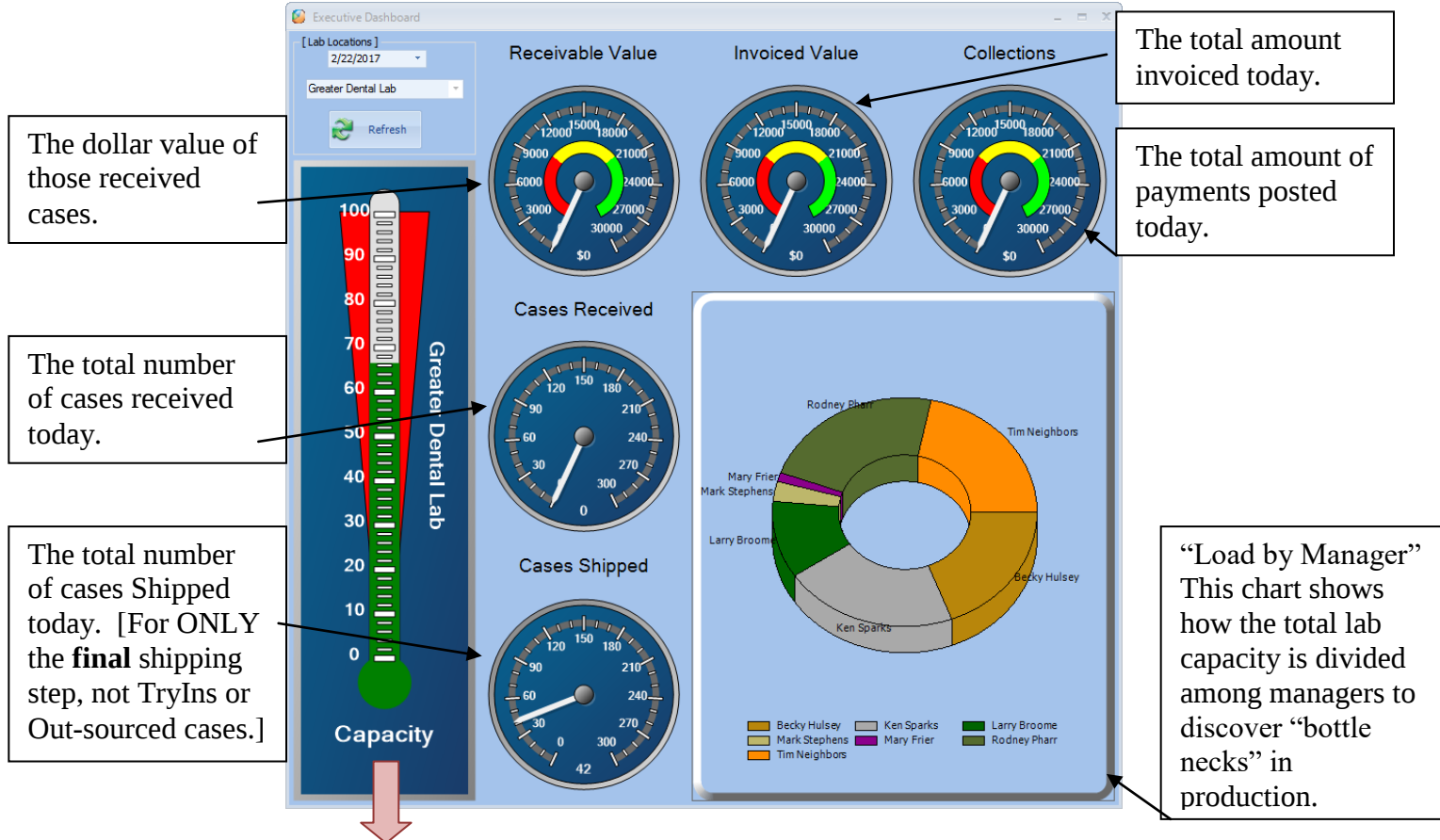
Technician production efficiency is calculated by comparing the total minutes worked for the day with the VALUE, in minutes, of completed cases. As techs stay on the clock and complete cases, this number will “rise and fall” during the course of the day. Efficiencies around 100% mean a tech is working at the rate expected.

Executive Dashboard

This is accessed from **Executive** under the **Management** menu.

This dashboard is intended to give you an overall look at the “health of the lab” based on activity for the selected date. This dashboard opens with “today” as the default selected date.

The graphs and dials represent the values for the day selected. The values do not include hold cases.



How the Executive Dashboard Calculates Lab Capacity

1. Capacity is for given date only.
2. Capacity includes ONLY work scheduled to specific techs for the given date for cases that are NOT on hold or cancelled.
3. The information is Calculated from following columns in the “TechCapacity” table.
 - A. “Mins” column = Technician Minutes. The actual scheduled minutes for each technician for the given date.
 - B. “DailyCap” column = Daily Capacity. The total daily capacity available for each tech for the given date.
4. Only technicians with records on that day are counted.
5. Technicians with the following flags activated in the Users table are NOT counted: “Is Shipping” flag or “Is Inactive” flag.

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6. We take the Min. column and total the minutes for each tech for that day, this equals our Total Min.
7. We take the Daily Capacity column and the 'Average' daily capacity for each tech for that day; this equals our 'AVG' Daily Capacity.
8. Then the Total Min and Total 'AVG' Daily Capacity is returned to the program and the values are attached to the grid.
9. The grid then calculates like this...

Total minutes divided by Total capacity = _____ x 100 = Lab Capacity

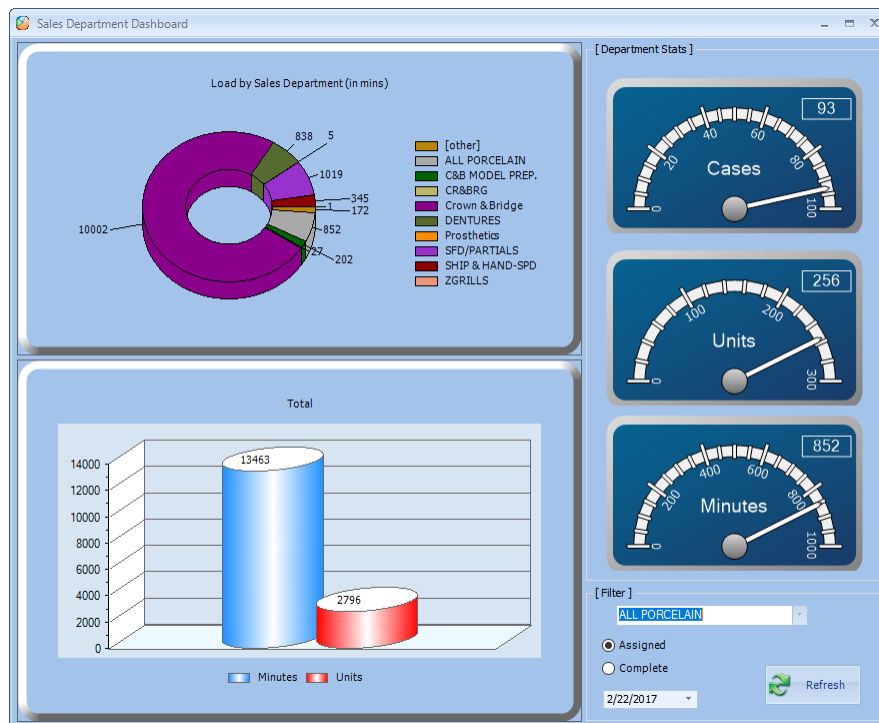
Department Dashboard

This is accessed from **Department** under the **Management** menu.

This dashboard is intended to be used to see “Loads by Department” for “today and prior dates” for uncompleted work. This dashboard gives more detail than the Executive dashboard, but less than the Manager dashboard. It does not include loads for Hold Cases.

Routing steps are assigned “Product Departments” in the Product Master **Srv Center** form on the “Base Schedule” tab. Any loads showing under the department “[other]” here are for steps that have not been assigned a department in the master.

The left-side pie chart shows all departmental totals in minutes. The left-side bar chart shows the same data in minutes and units. The right-side graphs show the detail of Cases, Units and Minutes for each department. As departments are scrolled, the dials change based on the displayed department.



Like the Manager dashboard, the Department dashboard will have data under “Assigned” at the beginning of the day and the “Complete” data will be blank. As techs process the work, loads will “drop off” the “Assigned” display and populate in the “Complete” display.