

Manager's Schedule

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Manager's Schedule

Overview

The **Manager Schedule** form will display the scheduled workload for a specific manager. You may view the workload: by a specific manager/department; by a specific date or date range; by technician or by routing step. A case may be rescheduled and reassigned to different technicians in this form. You may also view, by manager, all cases on hold, late cases and internal remakes. NOTE: For labs that are set up with multiple locations, you can see all location's cases without having to switch to the location in which a case was entered. However, to view **Cases by Tech** or **Cases By Step**, you must be in the assigned location for the manager associated to the Tech or Step.

View Cases by Tech or Step

1. From the **Management** menu, choose **Mgr Schedule** to open the "Manager Schedule" form.

Manager Schedule - (Step)

Becky Hulsey

[View]

☐ Tech

☒ Step

Search Cases

Cases By Step

Skip Steps

Cases On Hold

Late Cases

Internal Remake

[Case Color Code]

☐ In Process

☐ Rush

☐ Today

☐ Ready

☐ Late

☐ Scheduled

☐ Hold

Begin Date: 11/24/2016

End Date: 2/24/2017

Hold Case

View Cases

Notes

Bisque bake

Cases

2. Select the **Manager** or department by accessing the drop menu, top left.

Manager Schedule - (Step)

Becky Hulsey

Becky Hulsey

Isabella

Ken Sparks

Larry Broome

Mark Stephens

Mary Frier

Rodney Pharr

Tim Neighbors

Begin Date: 11/24/2016

End Date: 2/24/2017

Hold Case

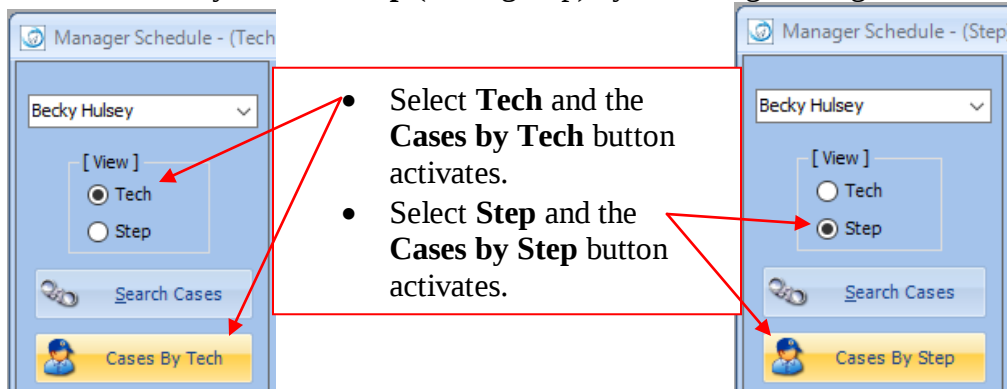
View Cases

Notes

Bisque bake

Manager's Schedule

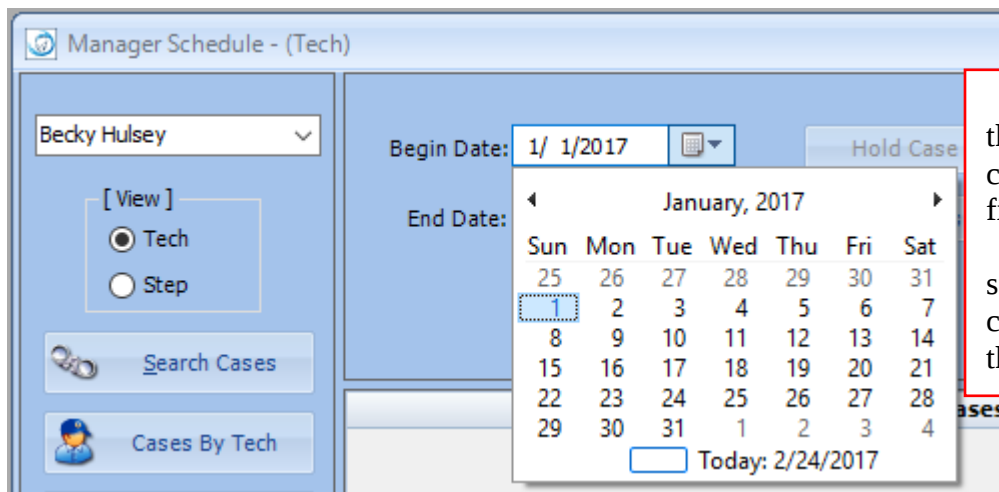
3. Select to view by **Tech** or **Step** (routing step) by activating the flag.



Cases by Tech will show cases assigned to the selected technicians who are associated to the selected manager.

Cases by Step will show cases assigned to all technicians associated to the manager for the selected step even if the technician is not associated to that manager. However the step must be associated to at least one technician under that manager for the step to appear.

4. Select a date range by using the drop calendar and clicking on the correct date. You may also click on each date field to highlight so you may type in a date.



Manager's Schedule

Monitor & Reschedule Cases

1. You may **select a manager** and choose “**Tech**” view to check all cases assigned to the manager’s team.
2. Click **Cases by Tech**. Cases assigned to the first tech will appear in the form by default.
3. A drop menu will appear that will display every technician in that manager’s department. Click in the field to open the menu and **choose a tech**.
4. **Choose a date range**.

Manager Schedule - (Tech) - 12 Cases Ready for Justin Gatty

Ken Sparks [View] [Tech] [Step] Search Cases Cases By Tech Skip Steps Cases On Hold Late Cases Internal Remake [Case Color Code] In Process Rush Today Ready Late Scheduled Hold

Begin Date: 1/1/2017 End Date: 2/24/2017 Tech: Justin Gatty Auto Resch View InPro Scheduled Ready

Justin Gatty Case: 2016-679 (S) Pan ID: Quality Control (CB) (2) Date: 1/4/2017	Justin Gatty Case: 2016-461 (I) Pan ID: Quality Control (CB) (2) Date: 2/22/2017	Justin Gatty Case: 2016-313 (I) Pan ID: 26532 Quality Control (CB) (2) Date: 1/31/2017	Justin Gatty Case: 2016-324 (I) Pan ID: 2653 Quality Control (CB) (2) Date: 1/31/2017	Justin Gatty Case: 2016-680 (I) Pan ID: R4088 Quality Control (CB) (1) Date: 2/23/2017
Justin Gatty Case: 2016-23 (I) Pan ID: Quality Control (CB) (2) Date: 2/23/2017	Justin Gatty Case: 2016-739 (I) Pan ID: T1234 Quality Control (CB) (2) Date: 2/22/2017	Justin Gatty Case: 2016-747 (R) Pan ID: b783 Contour (1) Date: 1/3/2017	Justin Gatty Case: 2016-775 (S) Pan ID: vb Quality Control (CB) (2) Date: 1/4/2017	Justin Gatty Case: 2017-4 (S) Pan ID: U394 Quality Control (CB) (2) Date: 1/9/2017
Justin Gatty Case: 2017-37 (S) Pan ID: drfg Quality Control (CB) (2) Date: 2/2/2017	Justin Gatty Case: 2017-44 (S) Pan ID: T64 Quality Control (CB) (2) Date: 2/2/2017			

- To check every tech in a department, click the first name in the drop menu and then use your arrow keys on your keyboard to scroll through the list.
- Each tech's workload will display in the bottom screen.

5. To **scroll through all technicians** in that department, select the first tech's name from the drop menu and then use the arrow keys on your keyboard to go through each technician's workload.
6. You may view **Scheduled**, **Ready** or **In Process** cases by clicking the appropriate button.

Manager Schedule - (Tech) - 5 Cases Scheduled for Justin Gatty

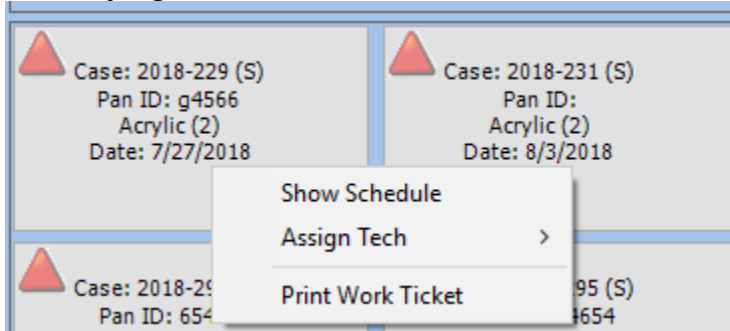
Ken Sparks [View] [Tech] [Step] Search Cases Cases By Tech Skip Steps Cases On Hold Late Cases Internal Remake [Case Color Code] In Process Rush Today Ready Late Scheduled Hold

Begin Date: 1/1/2017 End Date: 2/24/2017 Tech: Justin Gatty Auto Resch View InPro Scheduled Ready

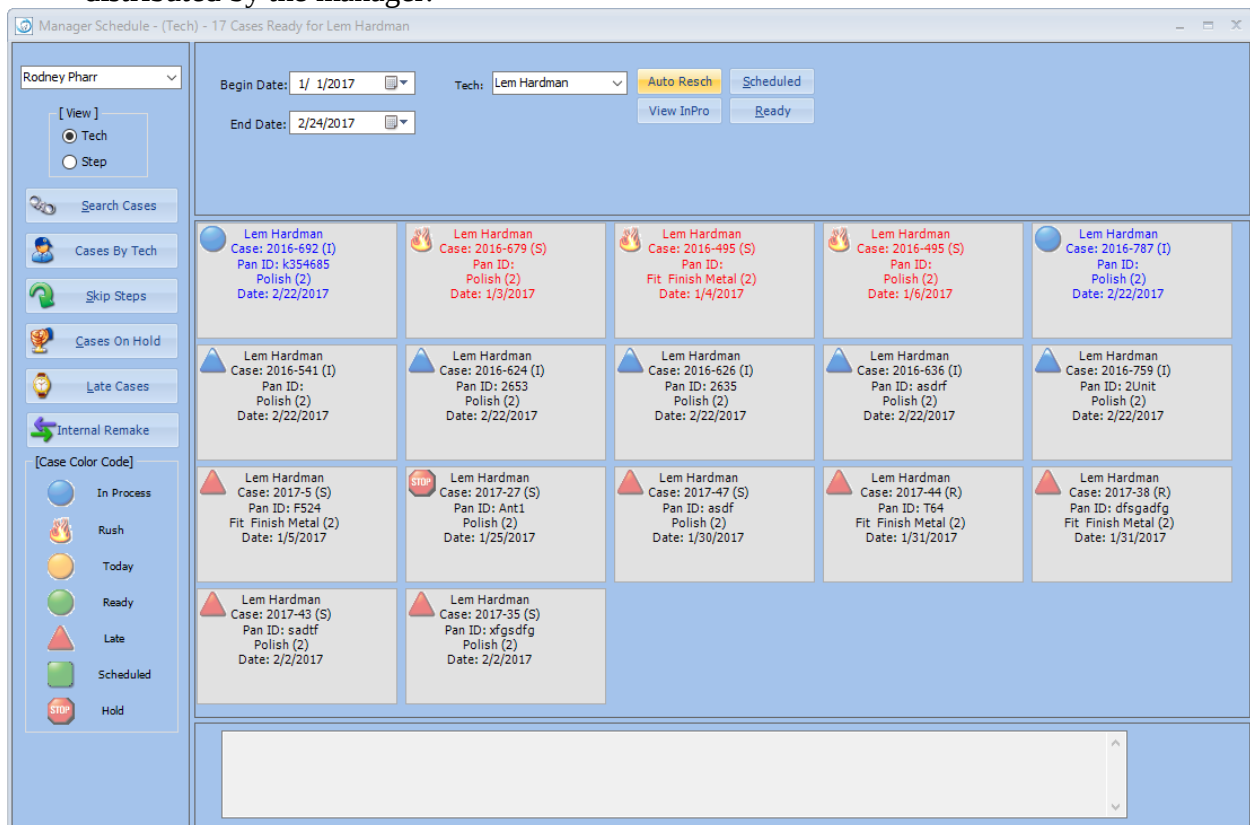
Justin Gatty Case: 2016-679 (S) Pan ID: Quality Control (CB) (2) Date: 1/4/2017	Justin Gatty Case: 2016-775 (S) Pan ID: vb Quality Control (CB) (2) Date: 1/4/2017	Justin Gatty Case: 2017-4 (S) Pan ID: U394 Quality Control (CB) (2) Date: 1/9/2017	Justin Gatty Case: 2017-37 (S) Pan ID: drfg Quality Control (CB) (2) Date: 2/2/2017	Justin Gatty Case: 2017-44 (S) Pan ID: T64 Quality Control (CB) (2) Date: 2/2/2017
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Manager's Schedule

7. You may right click on a case and **Show Schedule**, **Assign Tech** or **Print Work Ticket**.



8. Click **Auto Resch** to reschedule the assigned cases that tech may have for the given date. The Auto Reschedule assigns cases by priority, skill level and the other technician's capacity ratio. Cases on hold or cancelled will be excluded when calculating the ratio. **E.g.**, Manager Rodney Pharr learns that Lem Hardman will be absent today. He looks at Lem's scheduled cases in Polish. The manager can click **Auto Resch** to distribute those cases to other technicians in his department. Any difficult cases should be hand-distributed by the manager.



9. **To check on the Case:** You may use Case Inquiry (**Cases > Case Inquiry**) to see how the cases are rescheduled and distribute to other technicians.

Manager's Schedule

The case #2017-44 was rescheduled for Caroline Trip in Fit & Finish Metal. To refresh the Scheduled Steps tab, click to the next tab and click back on the Scheduled Steps tab.

Case Inquiry

Start Date: 11/24/2016 OR Enter Invoice Number Add Images
End Date: 2/24/2017 2017- Refresh Data

Dr: Adams Case #: 2017-00044 COD Clear Filters on Close
Acct #: 966 Pan #: T64 Acct Mgr: Ken Sparks

Case List Case Info Schedule Steps Implants Call Notes Invoices Tracking Tech Data Audit Data

Scheduled Steps

Department	Tech Name	Status	Start Date	Scheduled Start Date	End Date	Schedule End Date	Lab
Model Work-Fixed	Barbara Cooper	Complete	1/30/2017 9:47 AM	1/26/2017	1/30/2017 9:50 AM	1/26/2017	Greater Dental Lab
Prep Die	Caroline Trip	Complete	2/9/2017 1:49 PM	1/27/2017	2/9/2017 1:51 PM	1/27/2017	Greater Dental Lab
Wax Coping	Becky Hulsey	Complete	2/9/2017 1:53 PM	1/30/2017	2/9/2017 1:54 PM	1/30/2017	Greater Dental Lab
Cast	Becky Hulsey	Complete	2/9/2017 1:54 PM	1/30/2017	2/9/2017 1:54 PM	1/30/2017	Greater Dental Lab
Fit & Finish Metal	Caroline Trip	Ready		1/31/2017		1/31/2017	Greater Dental Lab
Metal Q.C.	Becky Hulsey	Scheduled		1/31/2017		1/31/2017	Greater Dental Lab
Opaque	Caroline Trip	Scheduled		2/1/2017		2/1/2017	Greater Dental Lab
Stack Porcelain	To Be Assigned	Scheduled		2/1/2017		2/1/2017	Greater Dental Lab
Contour	Barbara Cooper	Scheduled		2/2/2017		2/2/2017	Greater Dental Lab
Stain & Glaze	Bill Cannon	Scheduled		2/2/2017		2/2/2017	Greater Dental Lab
Polish	Jasen Hamm	Scheduled		2/2/2017		2/2/2017	Greater Dental Lab
Quality Control (C&B)	Justin Gatty	Scheduled		2/2/2017		2/2/2017	Greater Dental Lab
Invoice Case	Becky Little	Scheduled		2/3/2017		2/3/2017	Greater Dental Lab
Shipping	Caroline Trip	Scheduled		2/3/2017		2/3/2017	Greater Dental Lab

10. Also to check on the Case: The manager may view the Cast department by clicking view Step and scroll down the steps to "Fit & Finish Metal".

Manager Schedule (Step) - 10 Cases Ready for Fit & Finish Metal

Rodney Pharr

Begin Date: 1/1/2017 Step: Fit & Finish Metal Auto Resch: Scheduled
End Date: 2/24/2017 View InPro Ready

[View]
Tech
Step

Search Cases
Cases By Step
Skip Steps
Cases On Hold
Late Cases
Internal Remake

[Case Color Code]
In Process
Rush
Today
Ready
Late
Scheduled
Hold

Missy Coleman Case: 2016-495 (S) Pan ID: A4658 Fit Finish Metal (2) Date: 1/4/2017
Missy Coleman Case: 2017-76 (S) Pan ID: A4658 Fit Finish Metal (2) Date: 2/24/2017 INTERNAL REMAKE
Nick Cope Case: 2016-788 (R) Pan ID: Fit Finish Metal (3) Date: 1/3/2017
Caroline Trip Case: 2017-5 (S) Pan ID: F524 Fit Finish Metal (2) Date: 1/5/2017
Nick Cope Case: 2017-29 (R) Pan ID: asdf Fit Finish Metal (3) Date: 1/20/2017
Nick Cope Case: 2017-27 (S) Pan ID: Ant1 Fit Finish Metal (3) Date: 1/23/2017
Caroline Trip Case: 2017-44 (R) Pan ID: T64 Fit Finish Metal (2) Date: 1/31/2017
Nick Cope Case: 2017-40 (R) Pan ID: t654654 Fit Finish Metal (2) Date: 1/31/2017
Bill Cannon Case: 2017-38 (R) Pan ID: dfsgadfg Fit Finish Metal (2) Date: 1/31/2017
Summer Penderson Case: 2017-64 (S) Pan ID: 5984 Fit Finish Metal (3) Date: 2/2/2017

Notice the rescheduled Case #2017-44, is now assigned to Caroline Trip.

Manager's Schedule

Closing Technicians for Production when Scheduling by Use Tech

1. From the **Maintenance** menu choose **Calendar** to open the "Lab Calendar" form. Select the **Tech Calendar** tab and set 0 capacity for the technician(s) FIRST.
2. From the **Management** menu choose **Mgr Schedule** to open the "Manager Schedule" form.
3. Verify the correct manager is selected.
4. Under **View**, select the "Tech" option.
5. Click the button that now says "Cases by Tech."
6. In the "Tech" field, select the applicable technician.
7. All cases pre-scheduled to this tech will display - look at the "Begin Date" and "End Date." The "End Date" should be "today," so that the manager is not seeing cases scheduled beyond today. Any cases scheduled for "prior to today" and not done will also display.
8. To reassign techs for the displayed cases, click the "Auto Resch" button showing to the right of the tech name.
9. The system will pop a confirmation box for "Are you sure?" Click "Yes."
10. The system redistributes the cases to other, qualified technicians. If everything can be auto-reassigned, the buttons should disappear and the window will be blank.
11. The system "leaves" the cases it cannot reassign. The manager then handles those case manually by selecting a case (service data shows at the bottom), right-clicking, and selecting "Change Tech."

Manager's Schedule

Search by Case

You may view cases within a specified date range. NOTE: For labs that are set up with multiple locations, you can see all location's cases without having to switch to the location in which a case was entered.

1. Select the date range;
2. Click **Search Cases**;
3. Click **View Cases** for a real-time display of current production. You may filter by any of the fields by typing a field in the row immediately below the headings. For example you may search by doctor, but typing in the doctor's last name.

Manager Schedule - (Tech) - 44 Scheduled Cases

Joe Manager-Fixed

[View]

☒ Tech

☐ Step

Search Cases

Cases By Tech

Skip Steps

Begin Date: 11/ 2/2022

End Date: 11/ 2/2023

Release Case

Notes

View Cases

Call Doctor

Id	Case Number	Order Date	Ship Date	Carrier	Pan ID	Status	Ship Time	Dr First	Dr Last	Patient First	Patient Last	Case Num	Lab
14	2023-00024	2/1/2023	2/3/2023	Local		Hold	5:30 PM	Barbar	Knighto	Robbie	Evans	2023-24	ABS Dental Lab, Inc
14	2023-00079	5/10/2023	6/23/2023	Local	E34	Hold	8:00 AM	Barbar	Knighto	Tim	Peters	2023-79	ABS Dental Lab, Inc

4. Click on the line to highlight, and then double-click the line to open the schedule for that case.

Manager Schedule - (Tech) - Scheduled Steps for Case #2023-24

Joe Manager-Fixed

[View]

☒ Tech

☐ Step

Search Cases

Cases By Tech

Skip Steps

Cases On Hold

Late Cases

Internal Remake

[Case Color Code]

☐ In Process

☐ Rush

☐ Today

☐ Ready

☐ Late

☐ Scheduled

☐ Hold

Begin Date: 11/ 2/2022

End Date: 11/ 2/2023

Hold Date: 2/1/2023 8:46:00 AM

Release Case

Notes: Waiting for case to arrive

Dr. Request

No Due Date given - Original Due Date: 2/3/2023

Print Work Ticket

Patients Appt: 2/3/2023

Delivery Date: 2/3/2023

Carrier: Local Delivery

ShipTime: 8:00 AM

Out of Lab: 2/3/2023 5:00 PM

Generate Schedule

Save

Step	Assigned Tech	May 2023
		Fr 12 Sa 13 Su 14 Mo 15 Tu 16 We 17 Th 18 Fr 19 Sa 20 Su 21 Mo 22
Denture Pour & Trim (2)	Ken Sparks (2) - (H)	Day 1
Setup (2)	Setup (0) - (H)	
Wax up (2)	Wax up (0) - (H)	
Soft Reline (2)	Soft Reline (0) - (H)	
Denture QC (2)	Denture QC (0) - (H)	
Shipping (2)	Shipping (2) - (H)	

1 Denture - Vivodent DCL, Single, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16

Doctor: Knighton, Barbara J

Ship Date: 2/3/2023 5:30 PM

Patient Name: Evans, Robbie

Manager's Schedule

Skip Steps Options

Search by Case Number to view the Schedule.

1. Click **Skip Steps** to open the Case ID field.
2. Type in the **Case Number**.
3. Hit **Enter** on your keyboard.

The screenshot shows the 'Manager Schedule (NEW)' window. On the left, there is a sidebar with a search bar containing 'Barbara Knighton'. Below the search bar are radio buttons for '[View]' with options 'Tech' and 'Step' (selected). There are three buttons: 'Search Cases' (with a magnifying glass icon), 'Cases By Step' (with a person icon), and 'Skip Steps' (with a green arrow icon). On the right, the 'Case ID:' field contains the text '2019-214'.

4. The Schedule (from New Order entry) is viewable and editable.

The screenshot shows the 'Manager Schedule (NEW) - (Step) - Scheduled Steps for Case #2019-214' window. The top section includes a sidebar with the same search bar and radio buttons as the previous window. The main area contains a header with 'Begin Date: 10/ 7/2018' and 'End Date: 10/ 7/2019', along with 'Hold Case' and 'View Cases' buttons. On the right, there are fields for 'Original Due Date: 10/15/2019', 'Patients Appt:', 'Delivery Date: 10/14/2019', 'Carrier: South End', 'ShipTime: 8:00 AM', and 'Out of Lab: 10/14/2019 7:00 AM'. Below this is a grid showing the schedule for October 2019. The grid has columns for days of the week (Th 3, Fr 4, Sa 5, Su 6, Mo 7, Tu 8, We 9, Th 10, Fr 11, Sa 12, Su 13, Mo 14, Tu 15, We 16, Th 17, Fr 18, Sa 19) and rows for steps. The steps listed are: Model Work (2) - David Dash (2) - (C) (Day 1), Die Trim (2) - Chris Cross (3) - (C) (Day 2), Design (2) - Design (0) - (R) (Day 3), Invest & Cast (2) - Invest & Cast (0) - (S) (Day 4), Metal Finish (2) - Metal Finish (0) - (S) (Day 5), Opaque (2) - Opaque (0) - (S) (Day 5), Stain & Glaze (2) - Stain & Glaze (0) - (S) (Day 6), Metal Polish (2) - Metal Polish (0) - (S) (Day 7), Final QC (2) - Final QC (0) - (S) (Day 8), and Shipping (2) - Shipping (2) - (S) (Day 8). At the bottom, there is a section for 'Case Color Code' with options: In Process, Rush, Today, Ready, Late, Scheduled, and Hold. Below this is a list of items: 1 Veneer Pressable, Single, 4; 1 Captek Crown, Single, 12. At the bottom right, it says 'Doctor: Agers, John H.' and 'Ship Date: 10/14/2019 8:00 AM'.

Manager's Schedule

5. **You may edit the Schedule:** move scheduled days, change technicians, delete a step, bypass a step or print work ticket.
6. **Move scheduled days:** Drag the Day over to the new date. **Save**, when changes are complete.
7. **Change Technicians:** Right-click on the routing step to open a drop menu of applicable techs. Select the tech and click to reassign. You may also Delete or Bypass Steps.
NOTE: For Multi-location labs, you have the ability to schedule steps to other locations. For details on this feature refer to *Inter Location Scheduling for Multi-Location Labs* under *Scheduling & Technician Productivity Operations* heading in the online documentation.

To Print work ticket:
Select the “Print Work Ticket” flag.

Original Due Date: 10/15/2019
Print Work Ticket
Generate Schedule
Save
Patients Appt: 10/14/2019
Delivery Date: 10/14/2019
Carrier: South End
ShipTime: 8:00 AM
Out of Lab: 10/14/2019 7:00 AM

Step	Assigned Tech	Th 3	Fr 4	Sa 5	Su 6	Mo 7	Tu 8	We 9	Th 10	Fr 11	Sa 12	Su 13	Mo 14	Tu 15	We 16	Th 17	Fr 18	Sa 19
Model Work (2)	David Dash (2) - (C)	Day 1																
Die Trim (2)	Chris Cross (3) - (C)	Day 2																
Design (2)	Design (0) - (R)					Day 3												
Invest & Cast (2)	Invest & Cast (0) - (S)						Day 4											
Metal Finish (2)	Metal Finish (0) - (S)							Day 5										
Opaque (2)	Opaque (0) - (S)							Day 6										
Stain & Glaze (2)	Stain & Glaze (0) - (S)								Day 7									
Metal Polish (2)	Metal Polish (0) - (S)																	
Final QC (2)	Final QC (0) - (S)												Day 8					
Shipping (2)	Shipping (2) - (S)												Day 8					

1 Veneer Pressable, Single, 4
1 Captek Crown, Single, 12
Doctor: Agers, John H.
Ship Date: 10/14/2019 8:00 AM

8. If the delivery date is extended, you can choose **Generate Schedule** to allow the system to reschedule the assigned cases.

Manager's Schedule

9. Save changes.

Manager Schedule (NEW) - (Step) - Scheduled Steps for Case #2019-214

Barbara Knighton

[View]
☐ Tech
☒ Step

Search Cases
Cases By Step
Skip Steps
Cases On Hold
Late Cases
Internal Remake
[Case Color Code]
☐ In Process
☐ Rush
☐ Today
☐ Ready
☐ Late
☐ Scheduled
☐ Hold

Original Due Date: 10/15/2019
☐ Print Work Ticket
Generate Schedule
Save

Patients Appt:
Delivery Date: 10/22/2019
Carrier: South End
ShipTime: 8:00 AM
Out of Lab: 10/22/2019 7:00 AM

Step	Assigned Tech	Fr 11	Sa 12	Su 13	Mo 14	Tu 15	We 16	Th 17	Fr 18	Sa 19	Su 20	Mo 21	Tu 22	We 23	Th 24	Fr 25	Sa 26	Su 27	Mo 28
Model Work (2)	David Dash	Day 1																	
Die Trim (2)	Chris Cross			Day 2															
Design (2)	Design (0)				Day 3														
Invest & Cast (2)	Invest & Cast (0)					Day 4													
Metal Finish (2)	Metal Finish (0)						Day 5												
Opaque (2)	Opaque (0)							Day 5											
Stain & Glaze (2)	Stain & Glaze (0)								Day 6										
Metal Polish (2)	Metal Polish (0)										Day 7								
Final QC (2)	Final QC (0)											Day 8							
Shipping (2)	Shipping (2)												Day 8						

1 Veneer Pressable, Single, 4
1 Captek Crown, Single, 12
Doctor: Agers, John H.
Ship Date: 10/14/2019 8:00 AM

10. The system will confirm the case has been rescheduled.

Evolution Data

 Schedule Order #2019-214 has been rescheduled.

OK

Manager's Schedule

Putting Case on Hold

1. Use **Search Cases** button to find the case you wish to place on hold. Highlight and double click on the row to pull the case up.
2. Type a note, if necessary, in the Notes field.
3. Choose a pre-defined Hold reason from the drop-down box.

Manager Schedule (NEW) - (Step) - Scheduled Steps for Case #2019-141

Barbara Knighton

Begin Date: 10/ 7/2018 End Date: 10/ 7/2019

Hold Case View Cases

Notes: Placing on hold to discuss case with Doctor.

Print Work Ticket Generate Schedule Save

Original Due Date: 6/26/2019 Patients Appt: 7/3/2019 Delivery Date: 7/3/2019 Carrier: UPS Overnight ShipTime: 4:00 PM Out of Lab: 7/3/2019 2:00 PM

Step	Assigned Tech	Tu 18	We 19	Th 20	Mo 24	Tu 25	We 26	Th 27	Fr 28	Sa 29	Su 30	Mo 1	Tu 2	We 3	Th 4
Model Work (2)	David Dash (2) - (C)	Day 1													
Die Trim (2)	Chris Cross (3) - (R)	Day 2													
Design (2)	Design (0) - (S)														
Milling (2)	Milling (0) - (S)														
C&B QC (2)	Sissy Lewis (2) - (S)														
Opaque (2)	Opaque (0) - (S)														
Build (2)	Build (0) - (S)														
Contour (2)	Contour (0) - (S)														
Stain & Glaze (2)	Stain & Glaze (0) - (S)														
Metal Polish (2)	Metal Polish (0) - (S)														
Final QC (2)	Final QC (0) - (S)														
Shipping (2)	Shipping (2) - (S)														

2 PF to Non Precious(Non Precious), Single, 12, 13

Doctor: Knighton-ABS USE, Barbara

Ship Date: 7/3/2019 4:00 PM

4. Click the **Hold Case** button
5. The case is immediately put on hold.

Manager's Schedule

Releasing Case from Hold

1. Select **Cases on Hold** to view the cases that are currently on hold.

Manager Schedule (NEW) - (Step) - 12 Cases on Hold

Barbara Knighton

[View]
☐ Tech
☒ Step

Search Cases

Cases By Step

Skip Steps

Cases On Hold

Late Cases

Internal Remake

[Case Color Code]
☐ In Process
☐ Rush
☐ Today
☐ Ready
☐ Late
☐ Scheduled
☒ Hold

STOP	Case: 2019-15 (R) Pan ID: 647 Die Trim (2) Date: 2/6/2019	STOP	Sissy Lewis Case: 2019-16 (R) Pan ID: B3 Die Trim (2) Date: 2/8/2019	STOP	Case: 2018-254 (R) Pan ID: K31 Contour (2) Date: 2/21/2019 INTERNAL REMAKE	STOP	Case: 2019-46 (R) Pan ID: 558 Invest Cast (2) Date: 3/19/2019
STOP	Chris Cross Case: 2019-74 (I) Pan ID: B23 Model Work (2) Date: 4/17/2019	STOP	TryInRecTech-ABS Case: 2019-71 (I) Pan ID: SA343 TryIn Receiving (1) Date: 9/3/2019	STOP	TryInRecTech-ABS Case: 2019-89 (I) Pan ID: G23 TryIn Receiving (1) Date: 9/3/2019	STOP	Chris Cross Case: 2019-91 (I) Pan ID: B3433 TryIn Receiving (1) Date: 9/3/2019
STOP	Chris Cross Case: 2019-87 (I) Pan ID: F1234 TryIn Receiving (1) Date: 9/3/2019	STOP	TryInRecTech-ABS Case: 2019-83 (I) Pan ID: B678 TryIn Receiving (1) Date: 9/3/2019	STOP	Case: 2019-14 (R) Pan ID: 2 Design (2) Date: 5/8/2019 INTERNAL REMAKE	STOP	Chris Cross Case: 2019-141 (R) Pan ID: N334 Die Trim (2) Date: 6/18/2019

2. You may right click on a case and **Show Schedule** or **Print Work Ticket**.

STOP Case: 2019-14 (R)
Pan ID: 2
Design (2)
Date: 5/8/2019
INTERNAL REMAKE

STOP Chris Cross
Case: 2019-141 (R)
Pan ID: N334
Die Trim (2)

Show Schedule
Print Work Ticket

3. If you right click on **Show Schedule** the case schedule will come up.
4. Select **Release Case** button

Manager Schedule (NEW) - (Step) - Scheduled Steps for Case #2019-141

Barbara Knighton

[View]
☐ Tech
☒ Step

Search Cases

Cases By Step

Skip Steps

Cases On Hold

Late Cases

Release Case

Print Work Ticket

Generate Schedule

Save

Original Due Date: 6/26/2019

Patients Appt: 7/3/2019

Delivery Date: 7/3/2019

Carrier: UPS Overnight

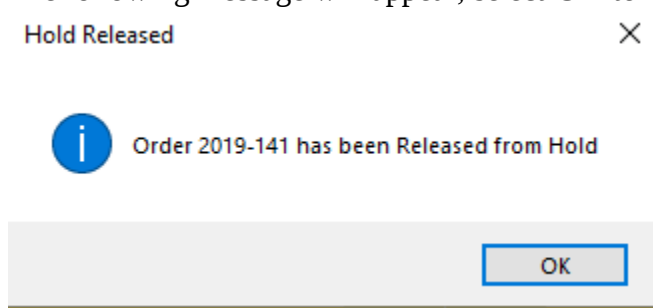
Ship Time: 4:00 PM

Out of Lab: 7/3/2019 2:00 PM

Step	Assigned Tech	Tu 18	We 19	Th 20	Fr 21	Sa 22	Su 23	Mo 24	Tu 25	We 26	Th 27	Fr 28	Sa 29
Model Work (2)	David Dash (2) - (H)	Day 1											
Die Trim (2)	Chris Cross (3) - (H)	Day 2											
Design (2)	Design (0) - (H)												
Milling (2)	Milling (0) - (H)												
C/R OC (2)	Sissy Lewis (2) - (H)												

Manager's Schedule

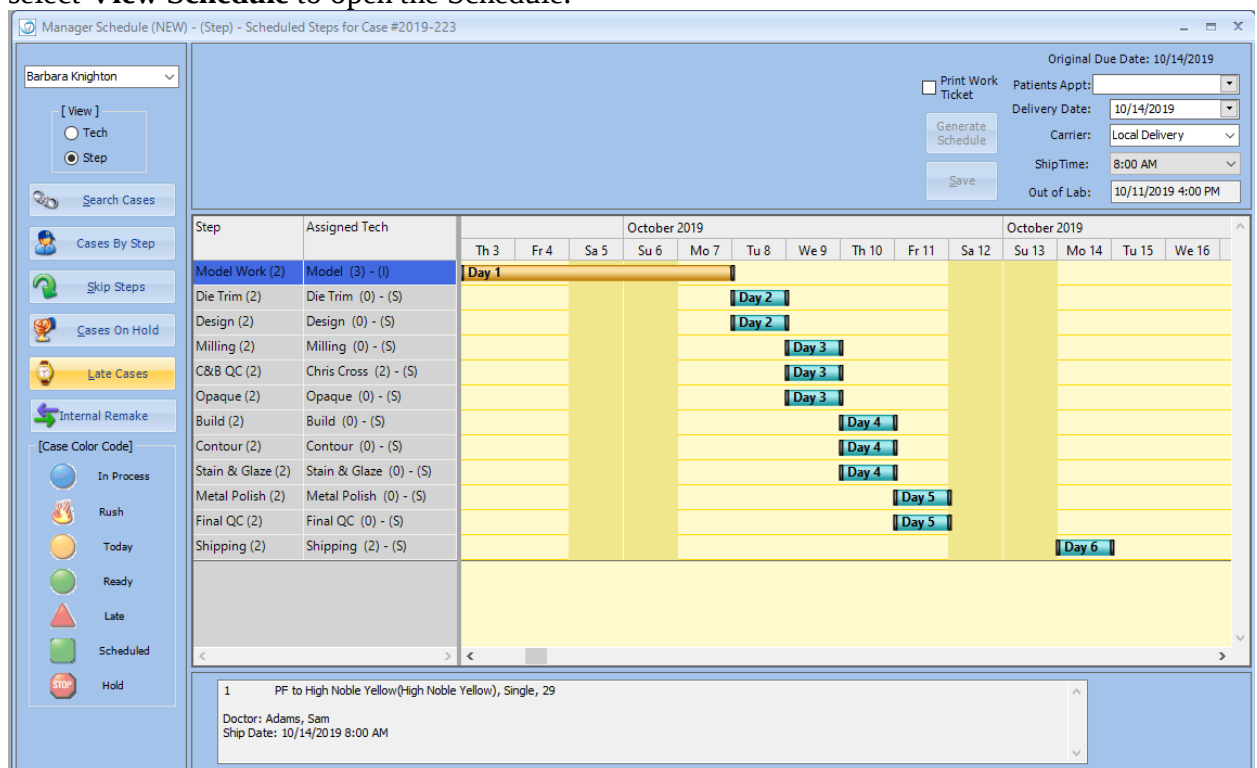
5. The following message will appear, select **OK** to release the case from hold.



Late Cases View

NOTE: For labs that are set up with multiple locations, you can see all location's late cases without having to switch to the location in which a case was entered.

1. Select **Late Cases** to view the cases that are behind according to the assigned schedule.
2. If you need to pull up the case to view or reschedule it, right-click on Case button and select **View Schedule** to open the Schedule.

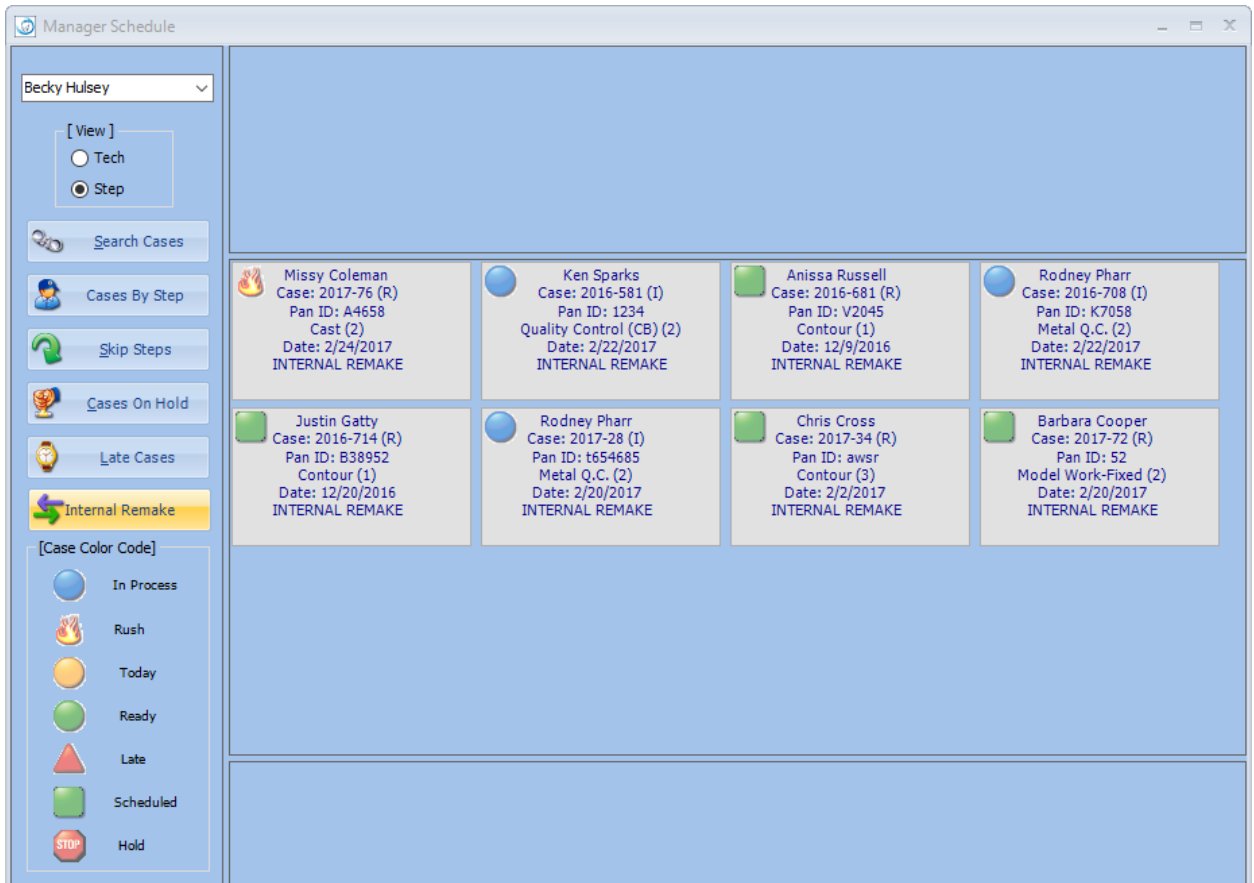
A screenshot of the "Manager Schedule (NEW) - (Step) - Scheduled Steps for Case #2019-223" window. The window has a sidebar on the left with navigation options: [View] Tech (radio), Step (radio), Search Cases, Cases By Step, Skip Steps, Cases On Hold, Late Cases (highlighted), Internal Remake, and Case Color Code (In Process, Rush, Today, Ready, Late, Scheduled, Hold). The main area shows a calendar for October 2019 with a table of steps and assigned techs. The steps are: Model Work (2), Die Trim (2), Design (2), Milling (2), C&B QC (2), Opaque (2), Build (2), Contour (2), Stain & Glaze (2), Metal Polish (2), Final QC (2), and Shipping (2). The assigned techs are: Model (3) - (I), Die Trim (0) - (S), Design (0) - (S), Milling (0) - (S), Chris Cross (2) - (S), Opaque (0) - (S), Build (0) - (S), Contour (0) - (S), Stain & Glaze (0) - (S), Metal Polish (0) - (S), Final QC (0) - (S), and Shipping (2) - (S). The calendar shows the schedule for each step, with days 1 through 6 indicated. The bottom of the window shows a text box with the text: "1 PF to High Noble Yellow(High Noble Yellow), Single, 29 Doctor: Adams, Sam Ship Date: 10/14/2019 8:00 AM".

Manager's Schedule

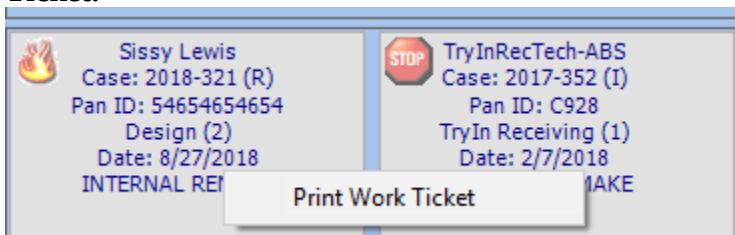
Internal Remake View

NOTE: For labs that are set up with multiple locations, you can see all location's internal remake cases without having to switch to the location in which a case was entered.

1. Select **Internal Remake** to view cases that have been routed back due to internal remakes.



2. If you wish to reprint a work ticket for the case, right click and select **Print Work Ticket**.

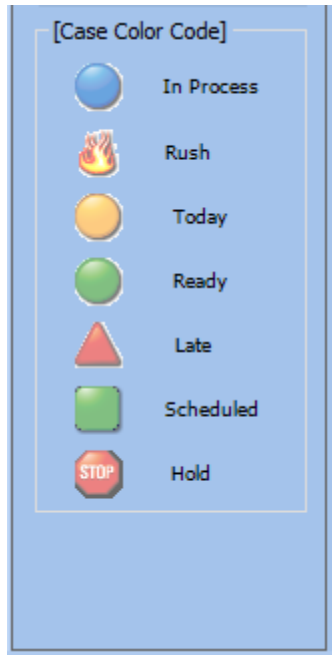


Manager's Schedule

Box Display

Case Color Codes

The color codes are listed on the form:



- **In Process:** The case is going through production on schedule.
- **Rush:** This case has been flagged as “Rush” while being entered in the New Order screen.
- **Today:** This case is on schedule for today.
- **Ready:** The case has finished one routing step and is waiting for the next step.
- **Late:** According to the schedule, this case is behind its time.
- **Scheduled:** This case has scheduled work but hasn't been checked into a department.
- **Hold:** This case has been put on hold and is not on schedule.

Fields



- Technician associated to the step
- Case Number (Step Status – see below)
- Pan Number
- Step Name (Skill level of the step)
- Step Start Date

Step Status

R: Ready

I: In Process

S: Scheduled