



Implementation Toolkit

Presented by:

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Implementation Toolkit

- A standardized methodology for implementing VISUAL Manufacturing®
- Delivered as a “toolkit” ... components that can be used as applicable for each implementation
- Generally takes the mid-size company approach but has commentary for smaller and larger company concerns
- Not just a manual ... full set of tools



Implementation Toolkit Scope

- VISUAL Manufacturing®
 - All standard functionality
 - Part trace
 - Dimensional inventory
 - Master production schedule
 - Material requirements planning
 - Wedge and central labor reporting
 - Not included: statistical sales forecasting, EDI



Implementation Toolkit Scope

- VISUAL Financials
 - All standard functionality
- VISUAL Payroll
 - Limited
- VISUAL Human Resources
 - Limited





Overview

- Ease the implementation process through organization
- Many different styles and approaches to implementation
- The toolkit is not a “canned” approach
- Series of tools and suggestions
- Use what is right for your organization
- Modify those tools that are close to what you want
- Probably won't use all the tools
- Takes the company beyond “go-live” into standard operating procedures and process improvement

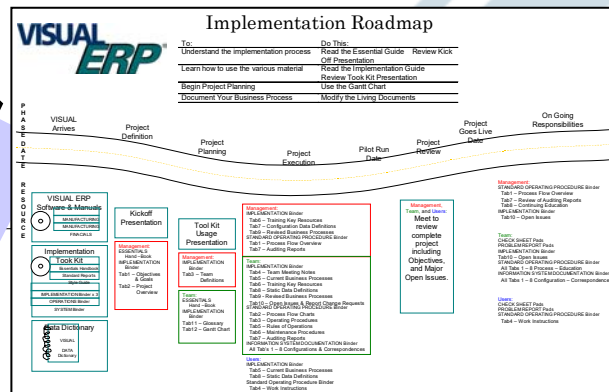
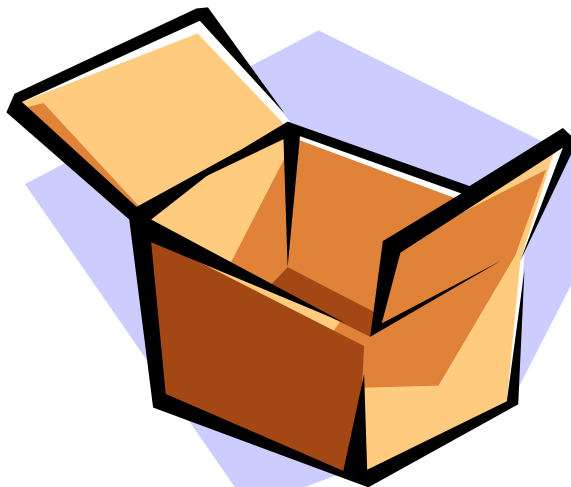
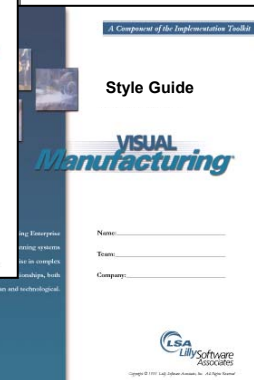
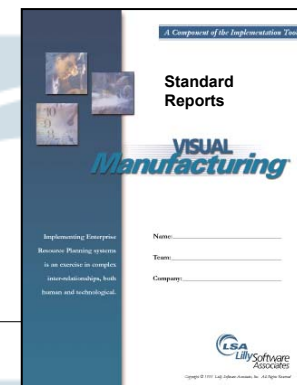
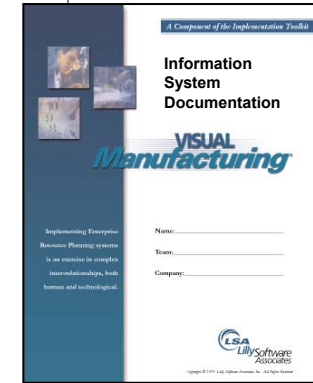
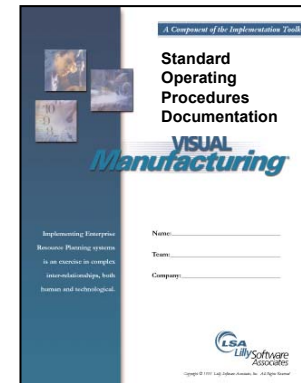
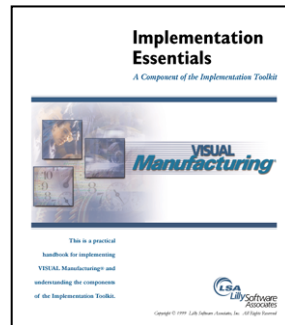
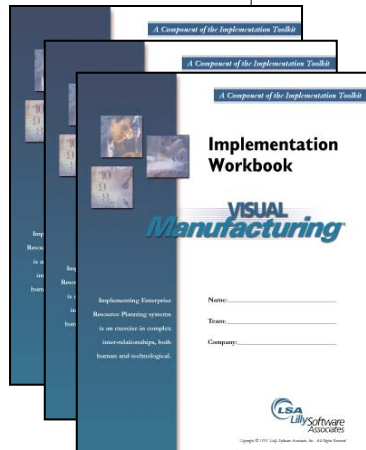


Contents

- *Implementation Essentials*
- Roadmap
- Kickoff Presentation
- Comprehensive work plan (Gantt chart)
- *Implementation Workbook* for core team
- *Information System Documentation*
- *Standard Operating Procedures*
- Standard Operating Procedures online
- *Standard Reports*
- *Style Guide*

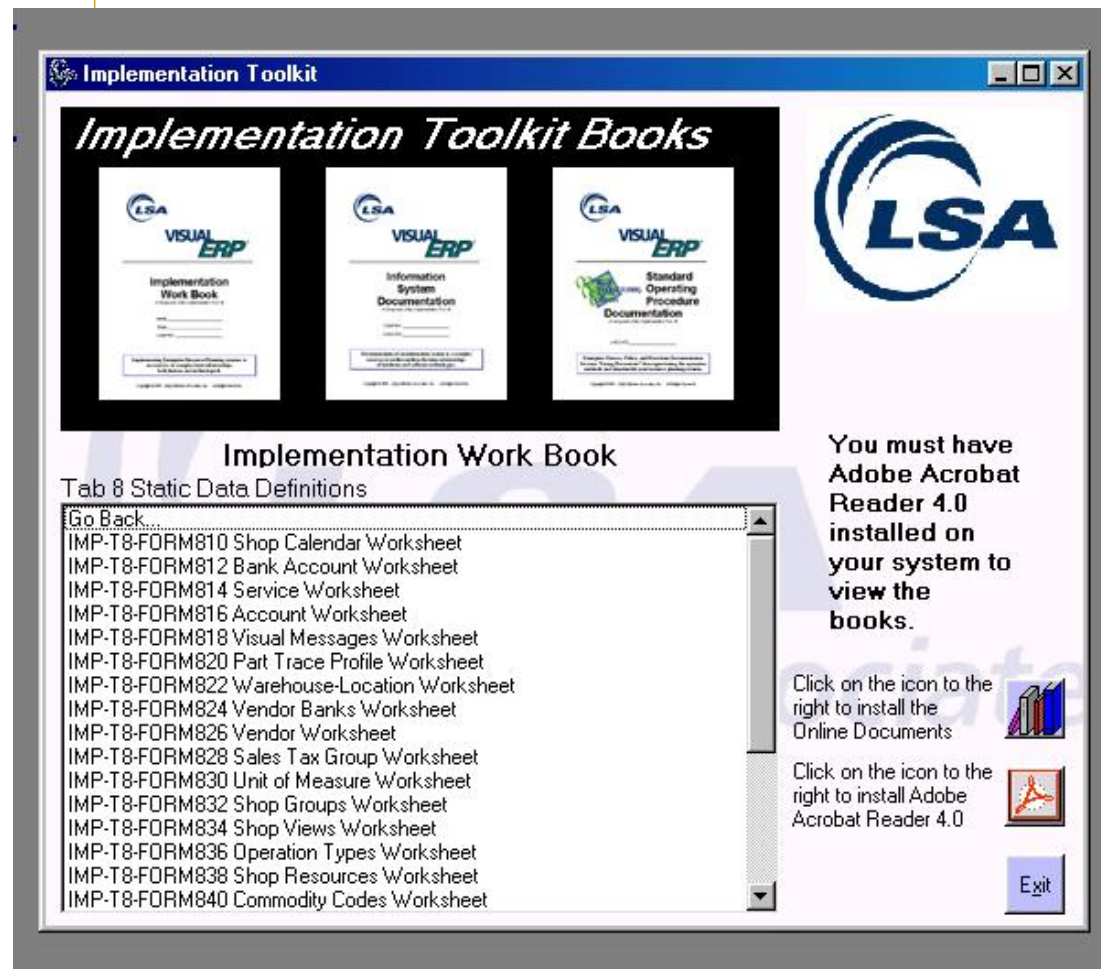


Implementation Toolkit Package

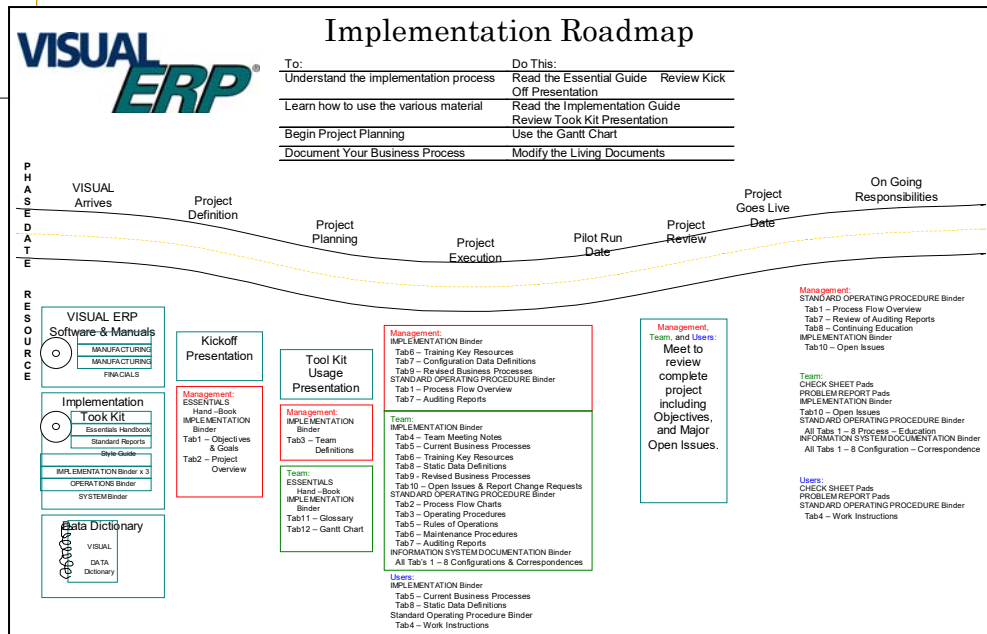




CD ROM Navigator

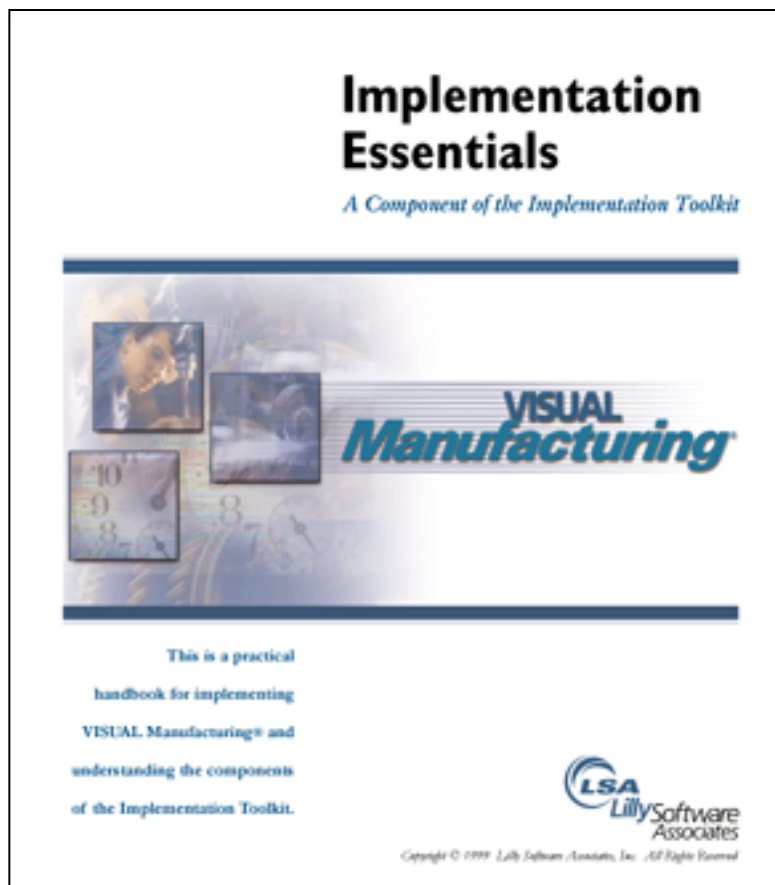


Implementation Roadmap



- “Getting started” guide
- Hi-level poster of overall implementation project
- Can mark-off relative progress for teams to see

Implementation Essentials



- Guide for formulating the implementation process
- Instructions on how to use the Toolkit components
- Instructions on customizing sample procedures
- Imperative information on how to implement VISUAL
- Section on 3rd party products



Implementation Essentials

- Purpose/scope
- Introduction
- Implementation tools
 - Toolkit components
 - Using the CD-ROM
 - Creating customized procedures
 - Setting up online documents
 - The VISUAL implementation
 - Project management overview
 - Project definition
- Project planning
- Project execution
- Project review
- On-going responsibilities
- Third party products
 - Implementation aids
 - Data access
 - Administrative tools
- Appendix
 - Sample forms
 - Bibliography

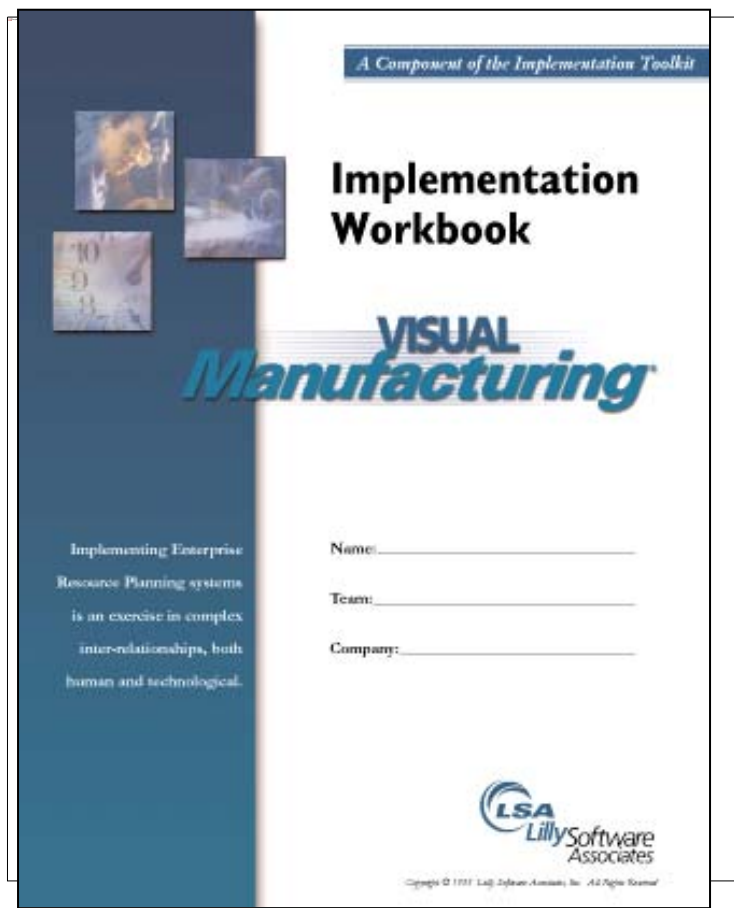


Kickoff Presentation



- Starting point to present the VISUAL Implementation Project to all involved
- Spaces left to fill in particulars of the implementation
- Easily customized
- PowerPoint format

Implementation Workbook



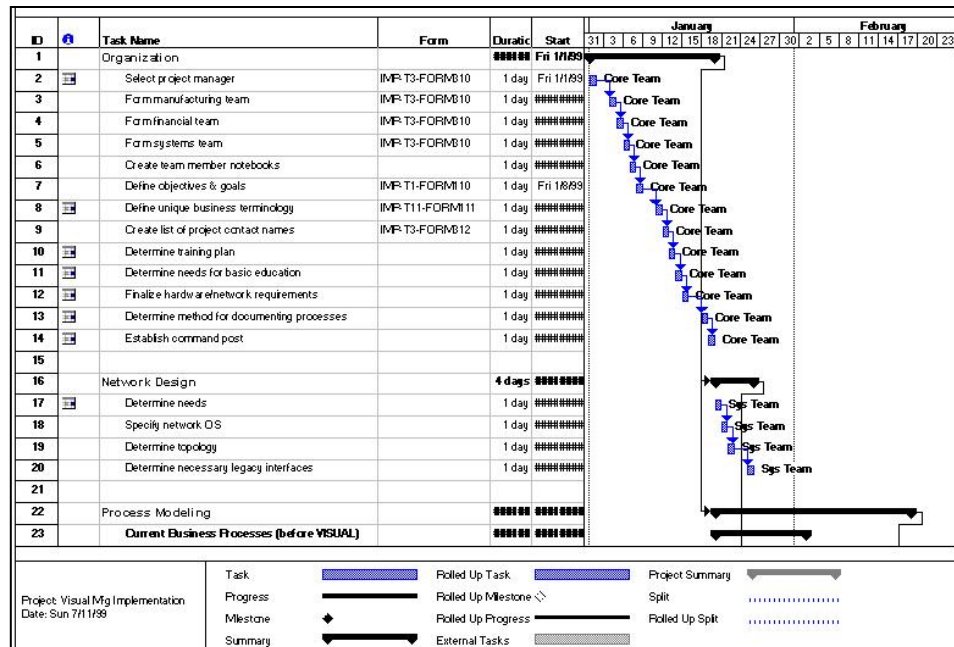
- “Information Central” for each core team member
- 3-ring binder with forms divided by tabs
- Use the many forms to capture thought processes, meeting notes, key decisions
- Document before and after processes
- Holds master work plan



Workbook Sections

- Tab 1 Objectives & Goals
- Tab 2 Project Overview
- Tab 3 Team Definitions & Contacts
- Tab 4 Team Meeting Notes
- Tab 5 Current Business Process (Before VISUAL)
- Tab 6 Training Key Resources
- Tab 7 Configuration Data Definitions
- Tab 8 Static Data Definitions
- Tab 9 Revised Business Processes (With VISUAL)
- Tab 10 Open Issues & Report Change Requests
- Tab 11 Company Glossary
- Tab 12 Gantt Chart

Gantt Chart



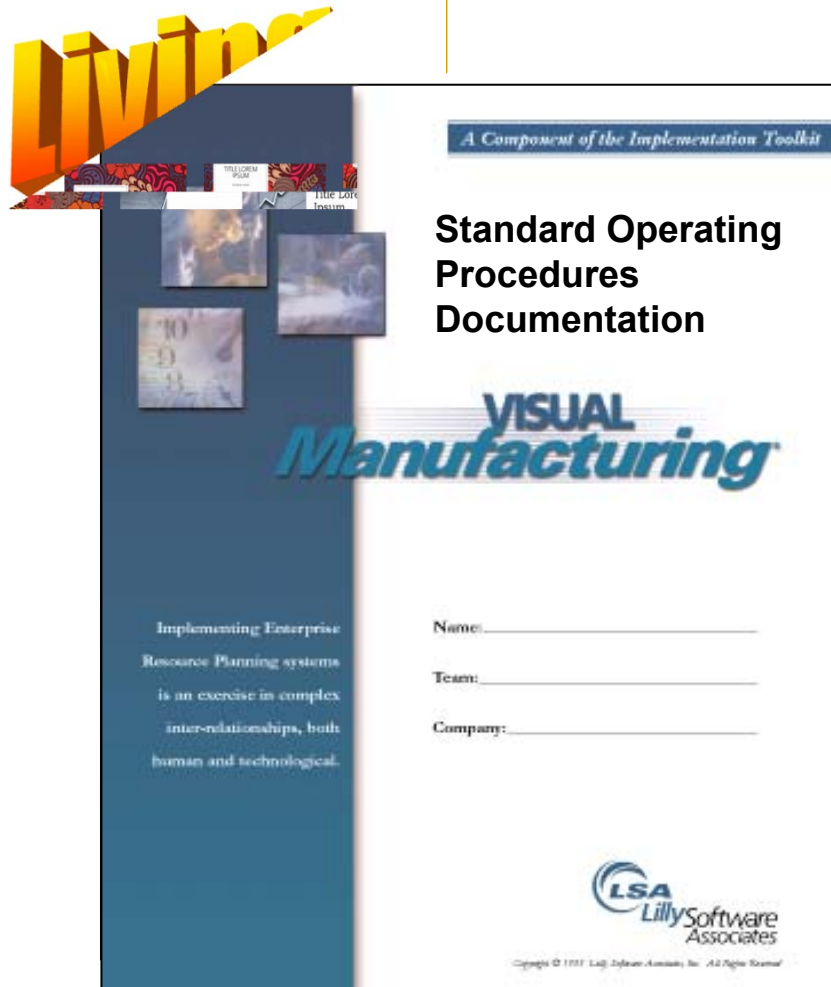
- Full task decomposition
- Template format has basic team assignments ... need to customize
- Remove tasks not applicable to the project
- Microsoft Project format
- Collapse to become hi-level overview
- References forms

Standard Reports Book



- Samples of all reports in VISUAL Manufacturing grouped by business function
- Teams can reference this when looking for reports and to note required changes
- Easy for management to select reports...don't need to know the software
- References menu commands

Standard Operating Procedures



- Comprehensive procedural documentation (3 levels)
 - Overview
 - Procedures
 - Work Instructions
- Framework and dozens of examples to build from
- 3 ring binder with tabs
- Online version in Acrobat



Standard Operating Procedures

- Tab 1 Process Flow Overview
- Tab 2 Process Flow Charts
- Tab 3 Operating Procedures
- Tab 4 Work Instructions
- Tab 5 Rules of Operation
- Tab 6 Maintenance Procedures
- Tab 7 Measurables & Comparative Reports
- Tab 8 Continuing Education



Online SOP's

Living

Adobe Acrobat - [#1 Header Page.pdf]

File Edit Document Tools View Window Help

Bookmarks Thumbnails Annotations Signatures

- Process Flows:**
 - Overview of Process Flow
 - Quoting & Estimating
 - Customer Order
 - Engineering Design
 - Production Scheduling
 - Material & Service Planning
 - Purchasing / Receiving
 - Inventory Control
 - Manufacturing
 - Shipping
 - Accounting
- Work Instructions**
 - Quoting & Estimating
 - Customer Order Entry
 - Engineering Master Design
 - ECN
 - Production Scheduling
 - Material Planning
 - Purchasing
 - Inventory Control
 - Shipping
- Entity Rules:**
 - Global Rules
 - Quoting Rules
 - Customer Rule
- SOP:**
 - Month-end Close
- Measurables:**
 - Comparative Reports

Visual Manufacturing - Business Processes
(Living Documents)

I. Process Flows:

A. Overview

1. Quoting & Estimating
2. Customer Order
3. Engineering Part & BOM Design
4. Production Scheduling
5. Material & Service Planning
6. Purchasing / Receiving
7. Inventory Control
8. Manufacturing
9. Shipping
10. Accounting

Overview
Process Flow
Work Instructions, & Forms
Supporting Evidence (Quality Records)

II. Entity Rules:

A. Global Rules

1. Customer Maintenance
2. Employee Maintenance
3. Part Maintenance
4. Shop Resource Maintenance
5. Service Maintenance
6. Vendor Maintenance
7. Warehouse Maintenance
8. G/L Account Maintenance
9. G/L User Guide

Global
Module Rules
Database Testing
Supporting Evidence (Test Data)

III. SOP (Standard Operating Procedures)

A. Database / System:

1. Backup
2. Reorganization or UnLoad / Load
3. Default User Login
4. Report File Over Ride

B. Financials:

1. Month-end Close
2. Year-end Close

C. Manufacturing:

1. x

Daily
Monthly
Scheduled
Supporting Evidence (Records & Tests)

IV. Measurables & Comparative Reports

A. Business Cycle

1. Customer Orders: On time delivery,
2. Work Orders
3. Purchasing

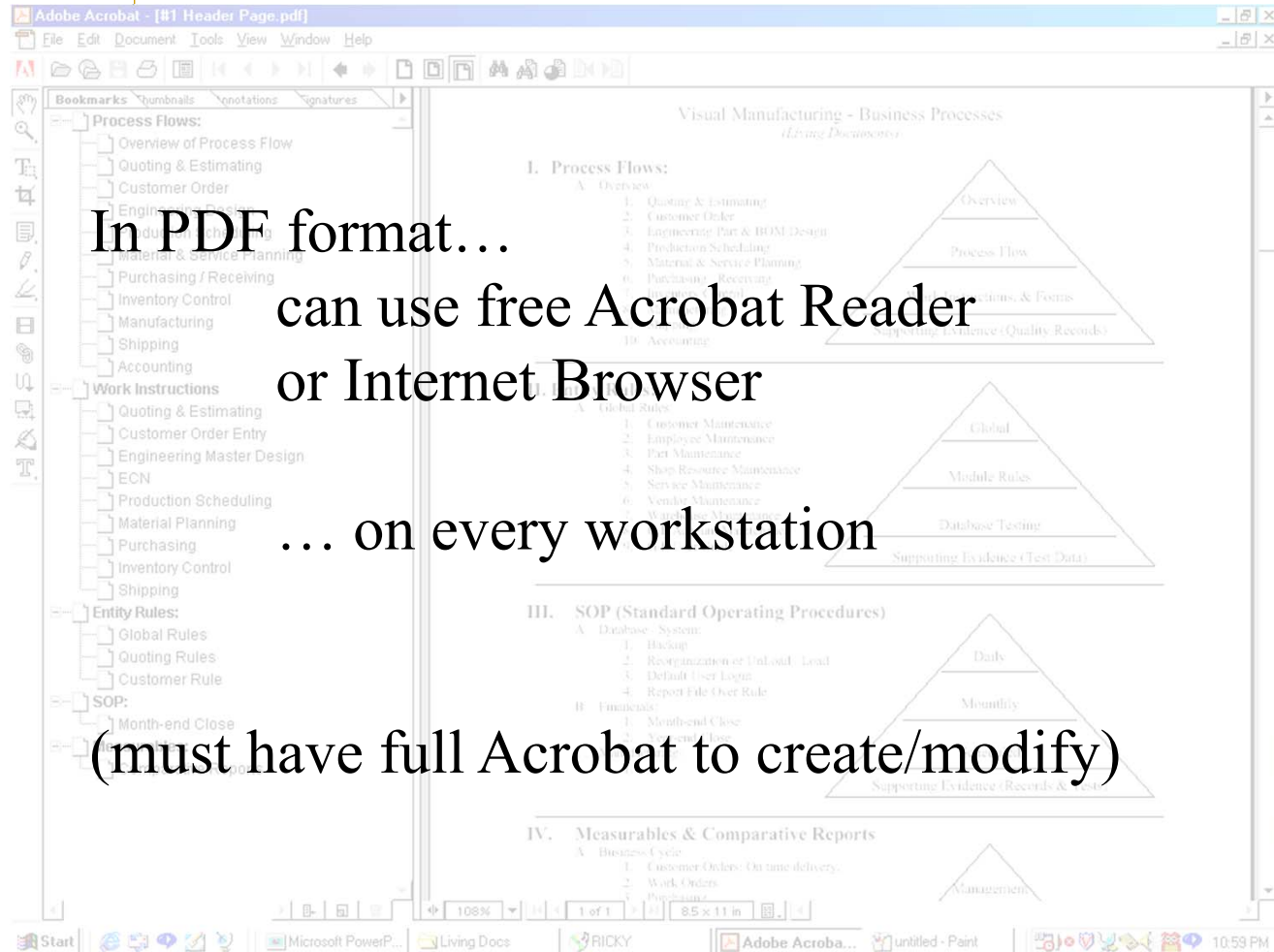
Management

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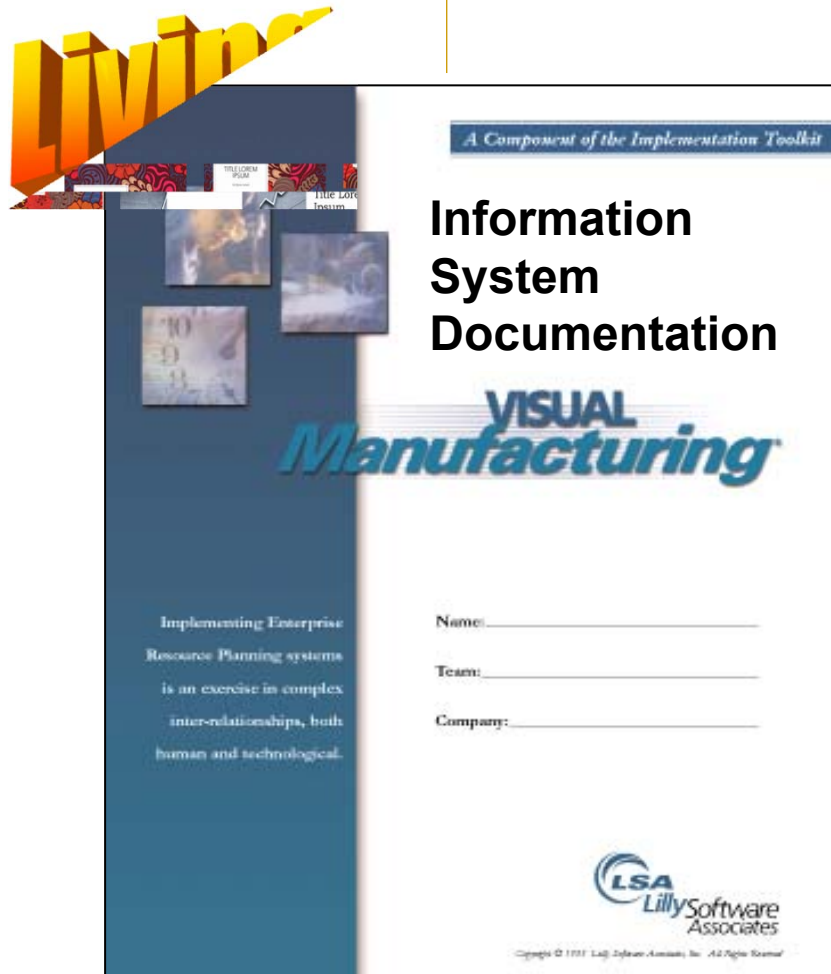


Online SOP's



In PDF format...
can use free Acrobat Reader
or Internet Browser
... on every workstation
(must have full Acrobat to create/modify)

System Documentation



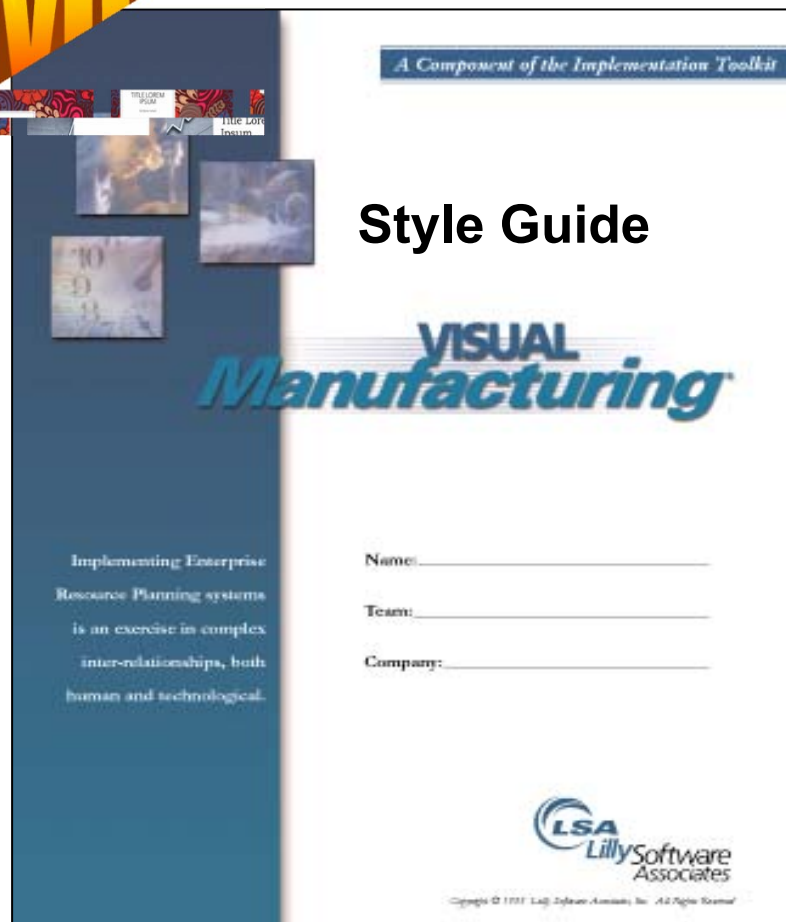
- Formal way of technically documenting VISUAL and the complete environment
- Structure in changing the many different components of software and hardware
- First line of defense for disaster recovery
- All correspondence in one place



System Documentation Sections

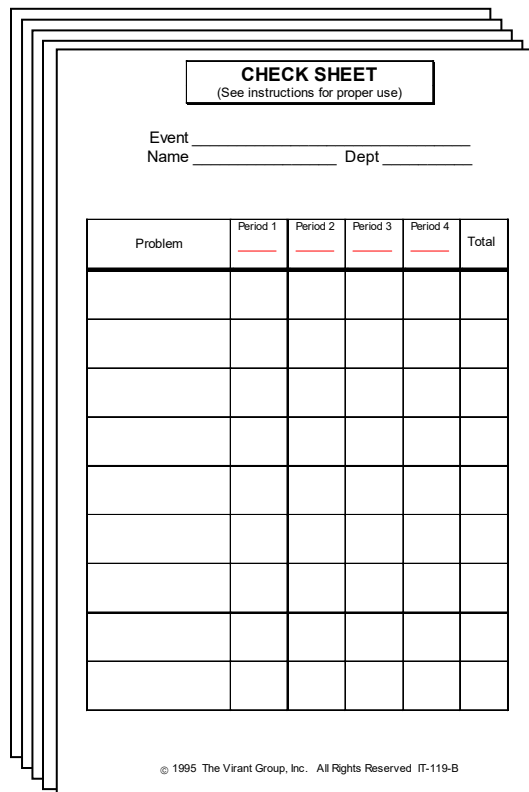
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- Tab 2 Server Documentation
- Tab 3 Client Documentation
- Tab 4 Front-end Documentation
- Tab 5 Back-end Documentation
- Tab 6 Lilly Software Associates Correspondence
- Tab 7 Computer Support Correspondence
- Tab 8 Other Correspondence

Documentation Style Guide



- Use as a style guide for creating and maintaining consistent procedural documentation
- Can be easily customized
- Consistent with documentation delivered with Toolkit

Process Improvement

A stack of several 'CHECK SHEET' forms. The top form is clearly visible and contains the following fields:

CHECK SHEET
(See instructions for proper use)

Event _____
Name _____ Dept _____

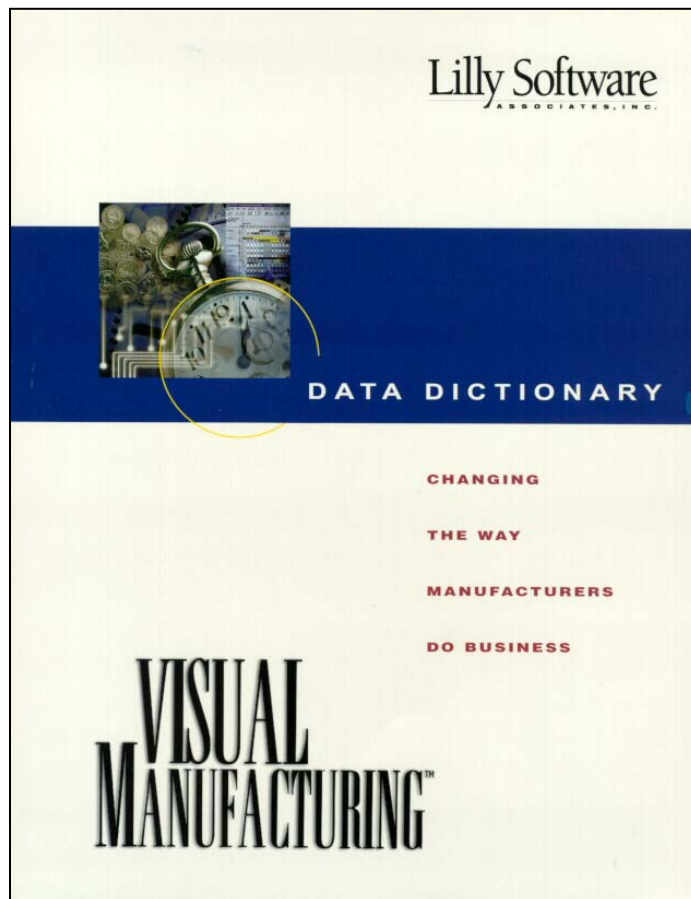
Problem	Period 1	Period 2	Period 3	Period 4	Total

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- Padded half-sheet forms to give to each user
- Capture next issues to address based on best value
- Capture problems in a systematic way

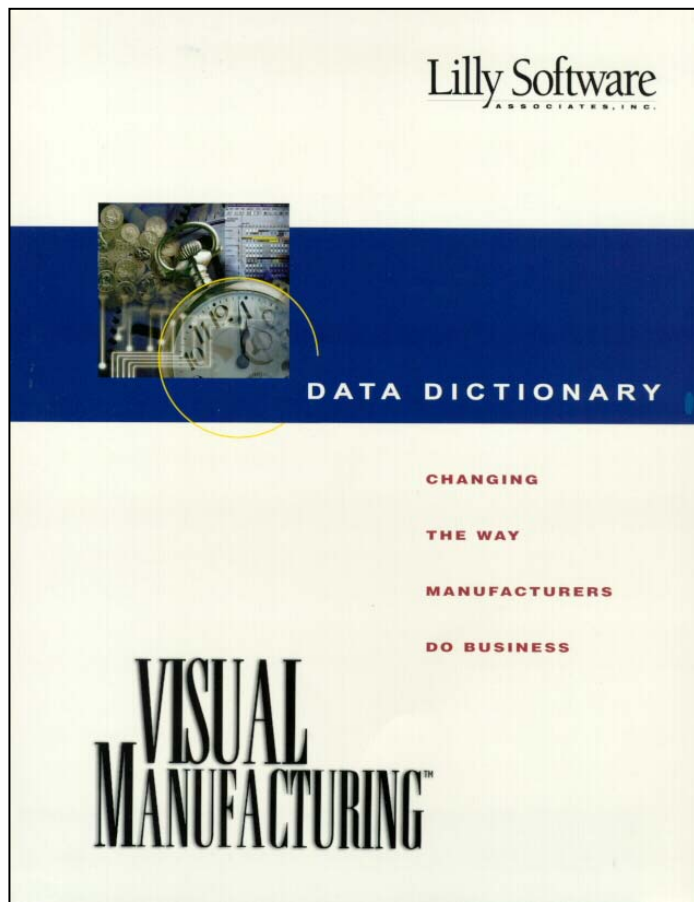


Data Dictionary



- Documents the VISUAL Manufacturing database
- Invaluable for report writing and data conversions
- Now available for release 6.1.1
- Versions 5.2, and 5.0 also available

Data Dictionary



- Introduction
- Window Maps
- Relational Maps
- Foreign Keys
- Table Definitions
- Columns Where Used
- Stored Procedures
- Report Names
- Abbreviations



Support

- Virant Group (Minneapolis)
 - Design
 - Updates
 - Suggestions
 - Comments
- Lilly Corporate
 - Owns it
 - Production
 - Distribution
 - Pricing





Conclusion

- Questions?
- Comments?
- Suggestions?

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