

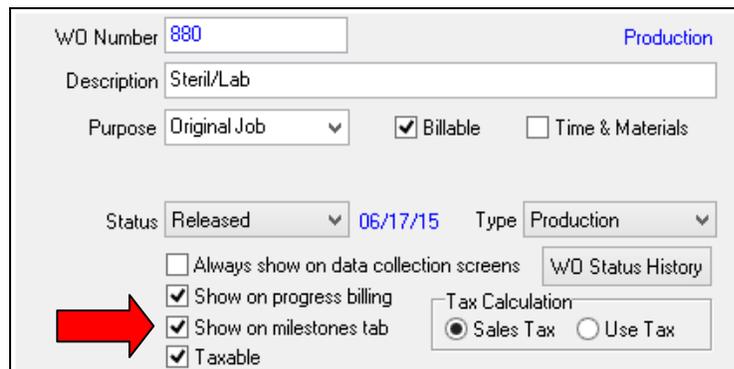
ShopPAK Version 5.0 Release Notes

Enhancements

Milestones

We've made significant improvements to milestones that make them easier to set up and use. Check out the following 6 enhancements.

1. Added a checkbox to Work Order details to either *exclude* or *include* the work order in the milestones sub tab.



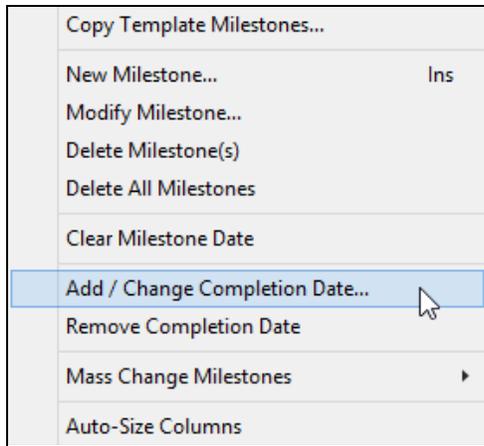
The screenshot shows a form for Work Order details. The fields are: WD Number (880), Description (Steril/Lab), Purpose (Original Job), Status (Released), and Type (Production). There are checkboxes for 'Billable' (checked), 'Time & Materials' (unchecked), 'Always show on data collection screens' (unchecked), 'Show on progress billing' (checked), 'Show on milestones tab' (checked), and 'Taxable' (checked). A red arrow points to the 'Show on milestones tab' checkbox. There is also a 'Tax Calculation' section with radio buttons for 'Sales Tax' (selected) and 'Use Tax' (unselected).

Many times, there are work orders that you don't track milestones for. This enhancement makes it easy to exclude them from the milestone grid so only work orders you want to track are displayed on the grid.

2. In a prior release, we introduced the option of synchronizing a milestone date with an actual Job Item or Work Order date, such as Ship Date, Material Due Date, etc. Whether you change the actual date or the milestone date, ShopPAK keeps the two dates in sync. The problem is we **only** re-calculated dependent milestone dates when the user changed a milestone date on the milestone grid.

We've addressed this shortcoming in this release. Now it doesn't matter if you change a synchronized Work Order date or the actual milestone. ShopPAK automatically recalculates dependent milestone dates associated with the changed milestone date. This is true even when changing a Job or Job Item date that trickles down to the corresponding Work Order date! If the date is tied to a milestone date, ShopPAK always keeps everything automatically in sync.

3. We've made it a lot easier to add or update milestone completion dates. In the prior release, you had to select a milestone cell, right mouse click the mouse, and then choose 'Add / Change Completion Date'.



You can still add or edit a completion date via the menu, however, an easier option is toggling the milestone grid view. There's a new checkbox located above the milestone grid....

Milestones Work Order All Auto Column Fill Down Show Completion Dates Milestone Dependencies None Forward Backward

Work Order	Description	Prelim Site Survey	Begin Shop Drawings	Submit Shop Drawings	Finish Sample	Shop Draw Approval	Material Take Off	BOM Finished	Order Materials	Receive Materials	Shop Release	Load and Delivery
879	Misc. Delivery &	04/11/20	04/09/20	05/09/20	03/16/20	03/28/20	05/19/20	05/31/20	06/02/20	06/16/20	06/21/20	08/05/20
880	Steril/Lab	03/26/20	04/06/20	04/08/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20
881	Procedure Rooms	04/11/20	04/18/20	05/18/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20
883	Storage Closet	03/02/20	03/09/20	04/08/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20
884	Reception Desk	04/11/20	04/18/20	05/18/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20
1279	Conference Room	03/04/20	03/11/20	04/10/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20
1280	Coaches Office	03/02/20	03/09/20	04/08/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20
1281	Office 2315 & 2316	03/02/20	03/09/20	04/08/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20
1282	Office 2315 & 2316	03/02/20	03/09/20	04/08/20	04/28/20	05/10/20	06/09/20	06/21/20	06/23/20	07/07/20	07/12/20	08/21/20

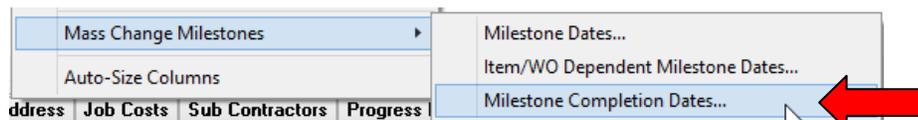
Placing a check in "Show Completion Dates" toggles the milestone grid to show completion dates...

Completion Dates Work Order All Auto Column Fill Down Show Completion Dates Milestone Dependencies None Forward Backward

Work Order	Description	Prelim Site Survey	Begin Shop Drawings	Submit Shop Drawings	Finish Sample	Shop Draw Approval	Material Take Off	BOM Finished	Order Materials	Receive Materials	Shop Release	Load and Delivery
879	Misc. Delivery &	04/14/20	04/02/20	05/01/20	04/23/20	04/30/20						
880	Steril/Lab		04/04/20									
881	Procedure Rooms		04/10/20	04/10/20								
883	Storage Closet											
884	Reception Desk			04/10/20								
1279	Conference Room			04/08/20								
1280	Coaches Office											
1281	Office 2315 & 2316											
1282	Office 2315 & 2316											

You can quickly add and change completion dates directly on the milestone grid, just like milestone dates.

- Speaking of completion dates, we've added a mass change dialog to quickly update several completion dates at the same time.



Mass Change Completion Dates

Milestone Completion Date

Set completion date to its target milestone date
 Enter completion date to be used
 Remove completion date

Target Rows

- 879 - Misc. Delivery & Install
- 880 - Steril/Lab
- 881 - Procedure Rooms
- 883 - Storage Closet
- 884 - Reception Desk
- 1279 - Conference Room
- 1280 - Coaches Office
- 1281 - Office 2315 & 2316
- 1282 - Office 2315 & 2316

Target Milestones

- Prelim Site Survey
- Begin Shop Drawings
- Submit Shop Drawings
- Finish Sample
- Shop Draw Approval
- Material Take Off
- BOM Finished
- Order Materials
- Receive Materials
- Shop Release
- Load and Delivery
- Punch List

3 options for updating completion dates.

Choose one or more milestone columns to update.

Choose one or more milestone rows (work orders or job items) to update.

5. We've made the Item / WO Dependent Data dialog even more powerful by adding option of mass changing several Job Items or Work Orders at the same time.

Job Item / Work Order Dependent Milestones

Job Wait Days and Target Milestones based on:

1280 - Coaches Office

plus minus 0 %

Adjust Job Wait Days

Milestone	Type	Relationship	Successor	Default Wait Days	Job Wait Days	Target Milestone Date	Completed Date
▶ Prelim Site Survey	Date	Dependent	Begin Shop Drawings	7	7	03/02/20	
Begin Shop Drawings	Date	Dependent	Submit Shop Drawings	30	30	03/09/20	
Submit Shop Drawings	Date	Dependent	Finish Sample	20	20	04/08/20	
Finish Sample	Date	Dependent	Shop Draw Approval	12	12	04/28/20	
Shop Draw Approval	Date	Dependent	Material Take Off	30	30	05/10/20	
Material Take Off	Date	Dependent	BOM Finished	12	12	06/09/20	
BOM Finished	Date	Dependent	Order Materials	2	2	06/21/20	
Order Materials	Date	Dependent	Receive Materials	14	14	06/23/20	
Receive Materials	Date	Dependent	Shop Release	5	5	07/07/20	
Shop Release	Date	Dependent	Load and Delivery	40	40	07/12/20	
Load and Delivery	Date	Dependent	Punch List	7	7	08/21/20	
Punch List	Date	Independent		0	0	08/28/20	

Select target rows you want to change:

- 879 - Misc. Delivery & Install
- 880 - Steril/Lab
- 881 - Procedure Rooms
- 883 - Storage Closet
- 884 - Reception Desk
- 1279 - Conference Room
- 1280 - Coaches Office
- 1281 - Office 2315 & 2316
- 1282 - Office 2315 & 2316

↓

6. If you use forward or backward milestone dependencies, we've added a new feature to initially populate your entire milestone grid **with just 3 mouse clicks!** After bringing in your milestone template, here are the steps:

- a. Pick a date on the independent milestone that controls dependent milestone dates and click 'Yes' when the message box appears.

Milestones Work Order: All | Auto Column Fill Down: | Show Completion Dates: | Milestone Dependencies: None Forward Backward | Skip Weekends:

Work Order	Description	Prelim Site Survey	Begin Shop Drawings	Submit Shop Drawings	Finish Sample	Shop Draw Approval	Material Take Off	BOM Finished	Order Materials	Receive Materials	Shop Release	Load and Delivery	Punch List
1030	Misc. Delivery & Cabinets												09/08/20
1031	Cabinets												
1032	Countertops												
1033	Installation												
1035	Installation												

Notice
 Calculate and create dependent milestone dates for current Work Order?
 Yes No

- b. The Job Item / Work Order dependent Milestone dialog appears. Adjust the 'Job Wait Days' if necessary, click the "Re-Calc Milestone Dates" button and then press OK.

Job Item / Work Order Dependent Milestones

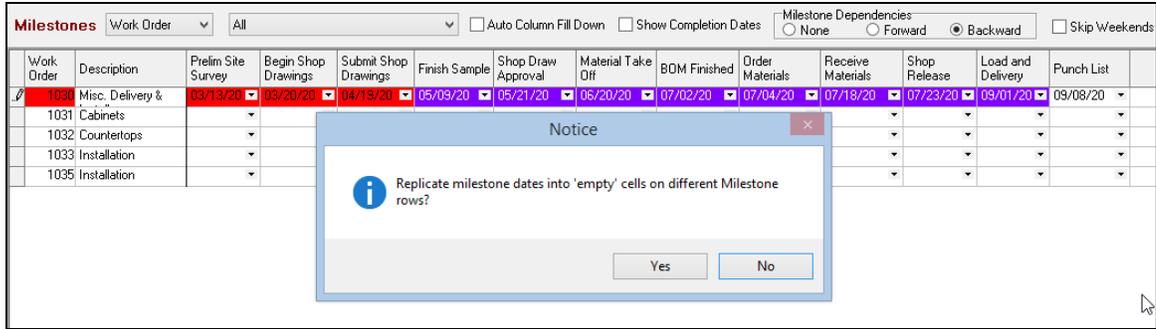
Job Wait Days and Target Milestones based on:
1030 - Misc. Delivery_Install

Adjust 'Job Wait Days' if needed. Then click 'Re-Calc Milestone Dates' button.

plus minus 0 % | Re-Calc Milestone Dates | Adjust Job Wait Days | Restore Default Wait Days

Milestone	Type	Relationship	Successor	Default Wait Days	Job Wait Days	Target Milestone Date	Completed Date
Prelim Site Survey	Date	Dependent	Begin Shop Drawings	7	7	03/13/20	
Begin Shop Drawings	Date	Dependent	Submit Shop Drawings	30	30	03/20/20	
Submit Shop Drawings	Date	Dependent	Finish Sample	20	20	04/19/20	
Finish Sample	Date	Dependent	Shop Draw Approval	12	12	05/09/20	
Shop Draw Approval	Date	Dependent	Material Take Off	30	30	05/21/20	
Material Take Off	Date	Dependent	BOM Finished	12	12	06/20/20	
BOM Finished	Date	Dependent	Order Materials	2	2	07/02/20	
Order Materials	Date	Dependent	Receive Materials	14	14	07/04/20	
Receive Materials	Date	Dependent	Shop Release	5	5	07/18/20	
Shop Release	Date	Dependent	Load and Delivery	40	40	07/23/20	
Load and Delivery	Date	Dependent	Punch List	7	7	09/01/20	
Punch List	Date	Independent				09/08/20	

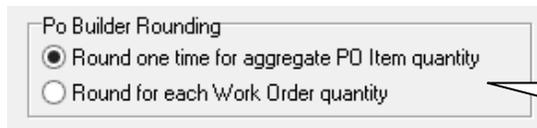
OK Cancel



c. Last, press "Yes" when the message box displays asking if you want to fill all of the Milestone grid rows, duplicating dates from the newly added Milestone row.

Work Order	Description	Prelim Site Survey	Begin Shop Drawings	Submit Shop Drawings	Finish Sample	Shop Draw Approval	Material Take Off	BOM Finished	Order Materials	Receive Materials	Shop Release	Load and Delivery	Punch List
1030	Misc. Delivery & Installation	03/13/20	03/20/20	04/19/20	05/09/20	05/21/20	06/20/20	07/02/20	07/04/20	07/18/20	07/23/20	09/01/20	09/08/20
1031	Cabinets	03/13/20	03/20/20	04/19/20	05/09/20	05/21/20	06/20/20	07/02/20	07/04/20	07/18/20	07/23/20	09/01/20	09/08/20
1032	Countertops	03/13/20	03/20/20	04/19/20	05/09/20	05/21/20	06/20/20	07/02/20	07/04/20	07/18/20	07/23/20	09/01/20	09/08/20
1033	Installation	03/13/20	03/20/20	04/19/20	05/09/20	05/21/20	06/20/20	07/02/20	07/04/20	07/18/20	07/23/20	09/01/20	09/08/20
1035	Installation	03/13/20	03/20/20	04/19/20	05/09/20	05/21/20	06/20/20	07/02/20	07/04/20	07/18/20	07/23/20	09/01/20	09/08/20

- Added more automation to keep AIA Progress Billing Sales GL Account code in sync with corresponding work order or job item. Starting with this release, we refresh GL Account code when user creates a new payment application, navigates between payment applications, or refreshes the active application for payment.
- Expanded Product and Ship Ticket Item 'Location' from 20 characters up to 40 characters since users sometimes exceed the old 20 character limit for describing 'location'.
- Added a new option to PO Builder that gives you more control over how PO Builder determines aggregate PO Item quantity and calculates PO Item Job quantity.



Located in ShopPAK Options on the Purchasing tab. When you upgrade to version 5.0, the first radio button is the default setting.

Prior to this version, PO Builder *always* behaved based on the first setting, rounding the *aggregate PO Item* quantity up to nearest whole number as shown below.

Job Item #1 has 4 distinct work orders calling for Vertical Grade Laminate.

Work Order	Description	Ship To	Customer	Qty	Pur. Qty	UOM
432	Typical Office		Avouch Contractors	16.22	17	sheet
433	Staff Lounge		Avouch Contractors	3.671	4	sheet
435	Storage		Avouch Contractors	19.891	20	sheet
436	Closet		Avouch Contractors	2.922	3	sheet
Total				42.704	43	sheet

Dragging the entire item over to the purchase order (this includes the 4 work order material needs), results in the following PO Item and PO Item job assignments:

Type	Inventory Code	Material Code	Description	Qty	UOM	Unit Price	Total Price	Overhead Markup %
Job			BID Vertical Grade Laminate	43	sheet	48.00000	2064.00	38

Job Id	Job Description	Item	Item Description	Work Order	Work Order Description	Qty
20008	Chase Bank - Downtown CONV	1	3rd Floor	432	Typical Office	16.75
20008	Chase Bank - Downtown CONV	1	3rd Floor	433	Staff Lounge	3.75
20008	Chase Bank - Downtown CONV	1	3rd Floor	435	Storage	19.75
20008	Chase Bank - Downtown CONV	1	3rd Floor	436	Closet	2.75

This approach results in the best material utilization, *provided you release and cut all 4 work orders as a batch*. However, if you release the work orders separately (and cut the sheet material for a given work order separately), there is a chance you'll be short on material, depending on your nesting utilization. For example, if you round each work order up by a whole sheet, the total quantity required for the job item will be 44, not 43.

To address this potential problem, we now give you a second option:

Po Builder Rounding

Round one time for aggregate PO Item quantity

Round for each Work Order quantity

Selecting this global option tells PO Builder to round each individual work order's needs up to the nearest whole number and aggregate each work order's **rounded quantities** for the total PO Item quantity.

Work Order	Description	Ship To	Customer	Qty	Pur. Qty	UOM
432	Typical Office		Avouch Contractors	16.22	17	sheet
433	Staff Lounge		Avouch Contractors	3.671	4	sheet
435	Storage		Avouch Contractors	19.891	20	sheet
436	Closet		Avouch Contractors	2.922	3	sheet
Total				42.704	44	sheet

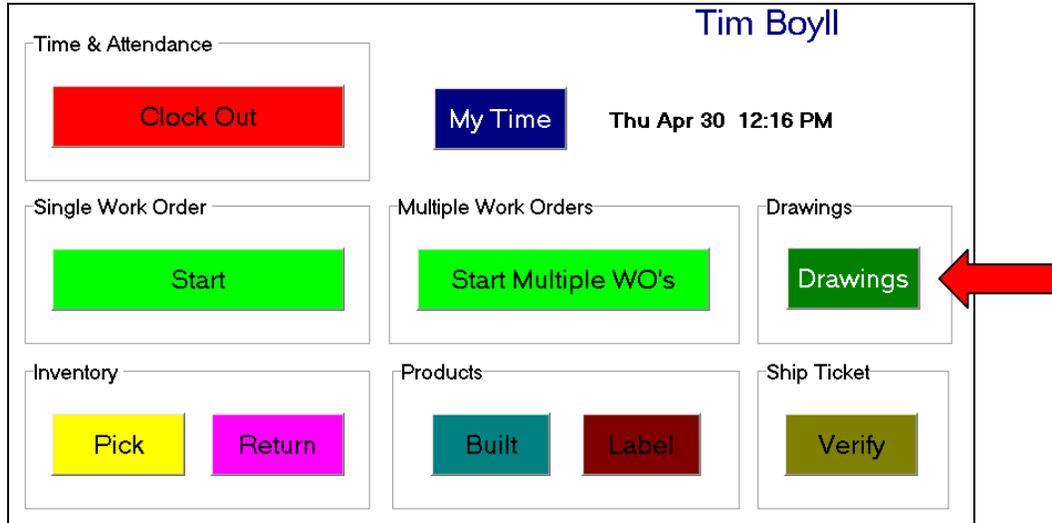
Dragging the job item on to the PO now results in a total PO Item quantity of 44:

Type	Inventory Code	Material Code	Description	Qty	UOM	Unit Price	Total Price	Overhead Markup %
Job			BID Vertical Grade Laminate	44	sheet	48.00000	2112.00	38

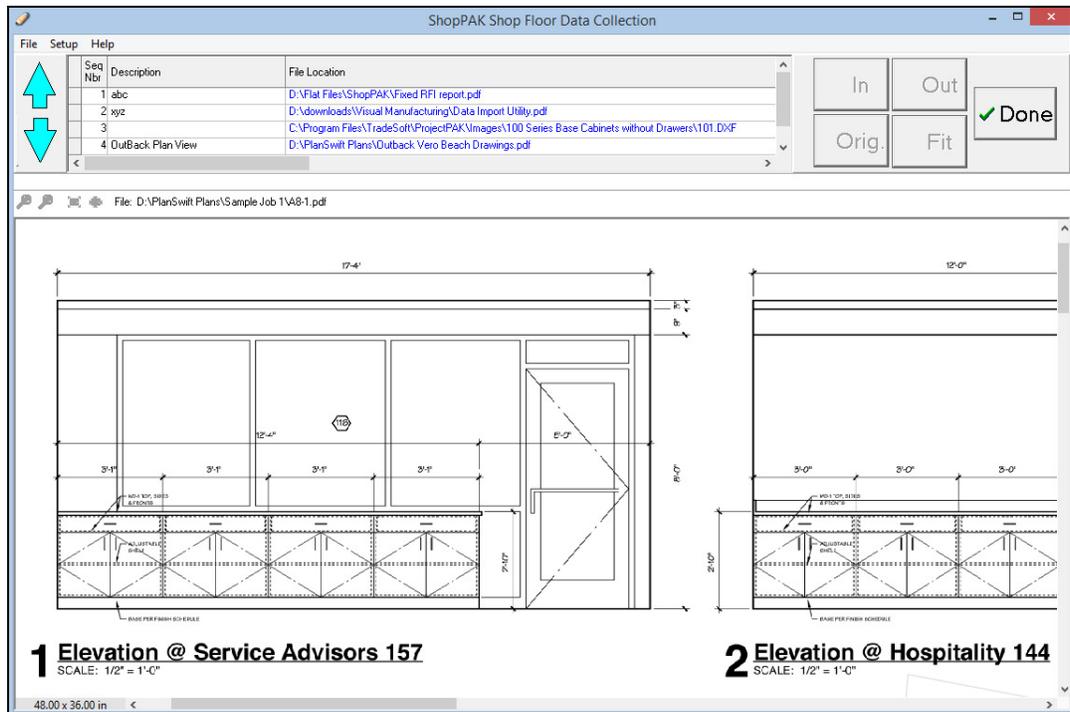
Job Id	Job Description	Item	Item Description	Work Order	Work Order Description	Qty
20008	Chase Bank - Downtown CONV	1	3rd Floor	432	Typical Office	17
20008	Chase Bank - Downtown CONV	1	3rd Floor	433	Staff Lounge	4
20008	Chase Bank - Downtown CONV	1	3rd Floor	435	Storage	20
20008	Chase Bank - Downtown CONV	1	3rd Floor	436	Closet	3

Shop Floor Data Collection - Controller and Workstation (5.0) Enhancements

1. Added button for displaying drawings on a shop floor kiosk.

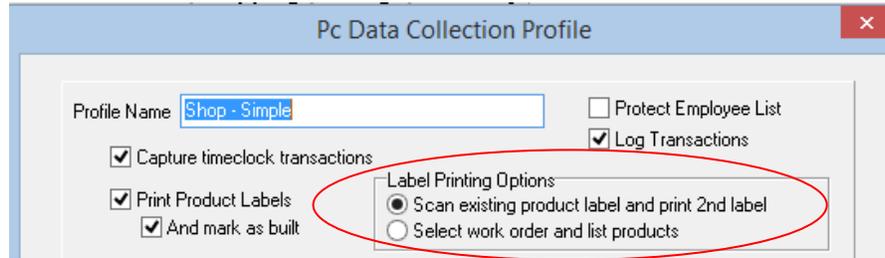


Pressing the new 'Drawings' buttons displays the Work Order selection screen. Pick the work order you are interested in. The kiosk then displays all of the drawings that have been associated with the work order (Note, use ShopPAK's Work Order 'Drawings' sub tab to link drawings to the work order).



Several graphic file formats are supported including PDF, JPG, BMP, DXF, DWG, TIF, and PNG. User can zoom in, zoom out, and move drawings around as needed.

- Added a new option for printing product labels. In the ShopPAK PC Data Collection setup dialog, there are now two choices:



Scan existing product label and print 2nd label

This is the new option designed for the customer that wants to scan a label that is already on a product, and then print an identical, second label to be attached to a wrapped product.

Select work order and list products

This is the way product label printing has always worked. Once user selects target work order, the kiosk shows all of the work order's products. The user selects the product and prints its product label. This is the default choice unless you override it.

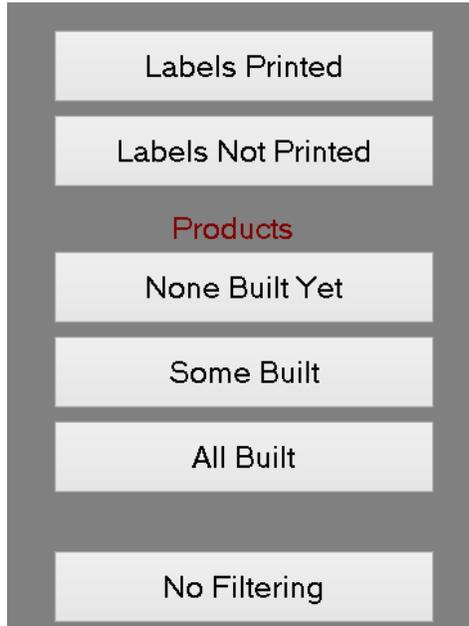
- In the prior release, users printed a product label one at a time. In this version, we've added option for batching and printing several product labels at the same time.

Print	Ref #	Code	Location	Description	Order Qty	Qty Built	Labels Printed
<input checked="" type="checkbox"/>	1	CTBS	Steril/Labs	CounterTop w/ BackSplash	20	20	19
<input type="checkbox"/>	2	DB4D_4	Steril/Labs	Drawer Stack 4 Equal Draw	20	2	2
<input checked="" type="checkbox"/>	3	W1D	Steril/Labs	Wall Cab 1 Door	80	3	3
<input checked="" type="checkbox"/>	4	B2D0D	Steril/Labs	Base Cab 2 Door R	20	2	4
<input type="checkbox"/>	7	B2D0D	Steril/Labs	Base Cab 2 Door	20	1	1
<input type="checkbox"/>	9	B2D0D	Steril/Labs	Base Cab 2 Door	20	0	0
<input type="checkbox"/>	10	CTISLD	Steril/Labs	CounterTop Island	60	4	6
<input type="checkbox"/>	12	B2D0D	Steril/Labs	Base Cab 2 Door Blind Cor	20	3	6
<input type="checkbox"/>	13	B2D1D	Steril/Labs	Base Cab 2 Door 1 Drawer	40	1	2
<input type="checkbox"/>	14	BS2D1D	Steril/Labs	Base Cab Sink 2 Door 1 Dr	40	1	2

- We've added 3 new 'read only' columns to the Print Product Label screen:

- Order Quantity
- Quantity Marked as Built
- Number of Labels Printed

- Added filtering to the Print Product Label screen to make it easier to find the product you want to generate a label for. Pressing the 'Filter' button displays the following screen:

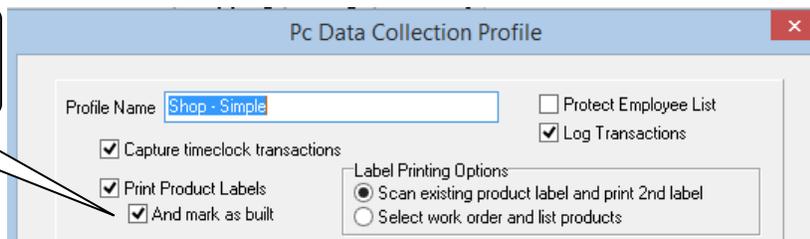


You can filter by labels printed / not printed and/or products built or not built. The kiosk filters rows accordingly and shows which filters are in place.

Above we filtered the product list to *only* show products that have had labels printed AND all of their products are marked as being built.

- Added a new option when printing labels to simultaneously increment the product's 'Quantity Built' counter.

When you print a label, the kiosk automatically updates the product's 'built' counter.



This is a nice timesaver for users who use shop floor data collection to print labels AND mark products as built.

Scoreboard (2.1)

Enhancements

1. We've redesigned Scoreboard milestones so they are aware of dependent milestone dates. If you change a milestone date, and one or more milestones are dependent on that milestone, Scoreboard automatically updates all affected milestones' dates.

The screenshot shows the Scoreboard application window with a menu bar (File, Options, Grid Data, View, Appearance, Help) and a toolbar with icons for Jobs, Milestones, Job Items, Work Orders, Departments, Operations, Materials, and Shipping. Below the toolbar is a grid of milestones. The grid has columns for Job ID, WO #, Description, and various milestone dates: Prelim Site Survey, Begin Shop Drawings, Submit Shop Drawings, Finish Sample, Shop Draw Approval, Material Take Off, BOM Finished, Order Materials, Receive Materials, Shop Release, Load and Delivery, and Punc. The dates are color-coded: green for completed, yellow for in progress, and red for overdue. At the bottom of the grid, there are 'On-Time Stats' for each milestone date, showing percentages like 9%, 25%, 30%, 35%, 75%, 80%, 95%, 83%, 83%, 83%, 94%, and 0/5. The status bar at the bottom shows '255-268 / 422', 'Milestone dates', 'Work Orders', and a 'Refresh' button.

- 2) We've added 'Days Remaining' Date calculation at the work order level. In the prior release, we only calculated 'Days Remaining' for a job date.

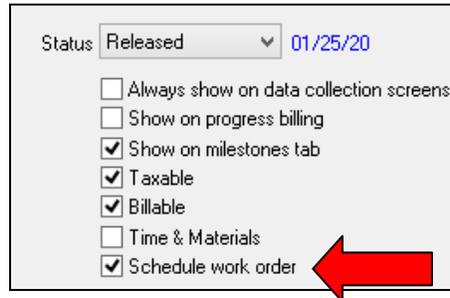
The screenshot shows the 'Job Data' setup dialog box. It has two main sections: 'Days Remaining' Date and 'Products to count'. In the 'Days Remaining' Date section, there are two dropdown menus: 'Job:' with 'Ship' selected and 'WO:' with 'Nothing' selected. A speech bubble points to these dropdowns with the text 'Located in Scoreboard's setup dialog box.' The 'Products to count' section has a list of checkboxes: 'Product' (checked), 'Hardware' (checked), 'Other' (checked), 'Service' (checked), and 'Material' (checked).

Choose the work order date field you want Scoreboard to calculate 'Days Remaining' for. If you like, it can be a different date field than what you choose for the job level.

Scheduler (4.0)

Enhancements

1. Added a new checkbox to ShopPAK's Work Order details tab that tells the Scheduler whether or not to include the work order when copying new jobs into the Scheduler.



Status: Released 01/25/20

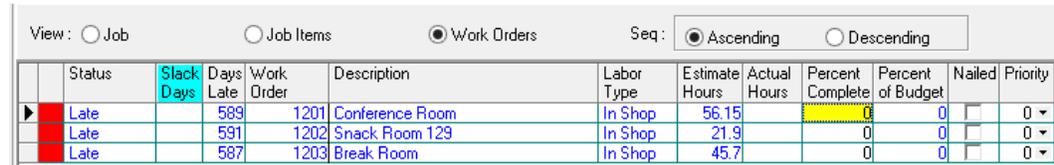
- Always show on data collection screens
- Show on progress billing
- Show on milestones tab
- Taxable
- Billable
- Time & Materials
- Schedule work order

We've added this option in case users have work orders that don't need to be scheduled. No reason to have unnecessary work orders in the Scheduler work order queue vying for resource.

Note, this new feature ONLY works when initially populating the job tree in the 'Jobs To Schedule' panel. If a work order is already in the Scheduler, you'll need to manually remove it from the Scheduler by dragging it from the schedule area down to the unscheduled area.

Corrections

1. In the prior version, sometimes the radio buttons disappeared when selecting a different job or resizing the Scheduler window. Fixed in this release.



View: Job Job Items Work Orders Seq: Ascending Descending

	Status	Slack Days	Days Late	Work Order	Description	Labor Type	Estimate Hours	Actual Hours	Percent Complete	Percent of Budget	Nailed	Priority
▶	Late		589	1201	Conference Room	In Shop	56.15		0	0	<input type="checkbox"/>	0 ▾
	Late		591	1202	Snack Room 129	In Shop	21.9		0	0	<input type="checkbox"/>	0 ▾
	Late		587	1203	Break Room	In Shop	45.7		0	0	<input type="checkbox"/>	0 ▾

2. Fixed intermittent scheduling problem where departments would not honor previous dependent department finish dates, and thus, would start sooner than they should have started.
3. Fixed scheduling problem that caused successor departments to sometimes be scheduled improperly because slippage was less than a day. In the prior version we were subtracting just the day part of the timestamp. This release properly subtracts the entire timestamp including both day and time.