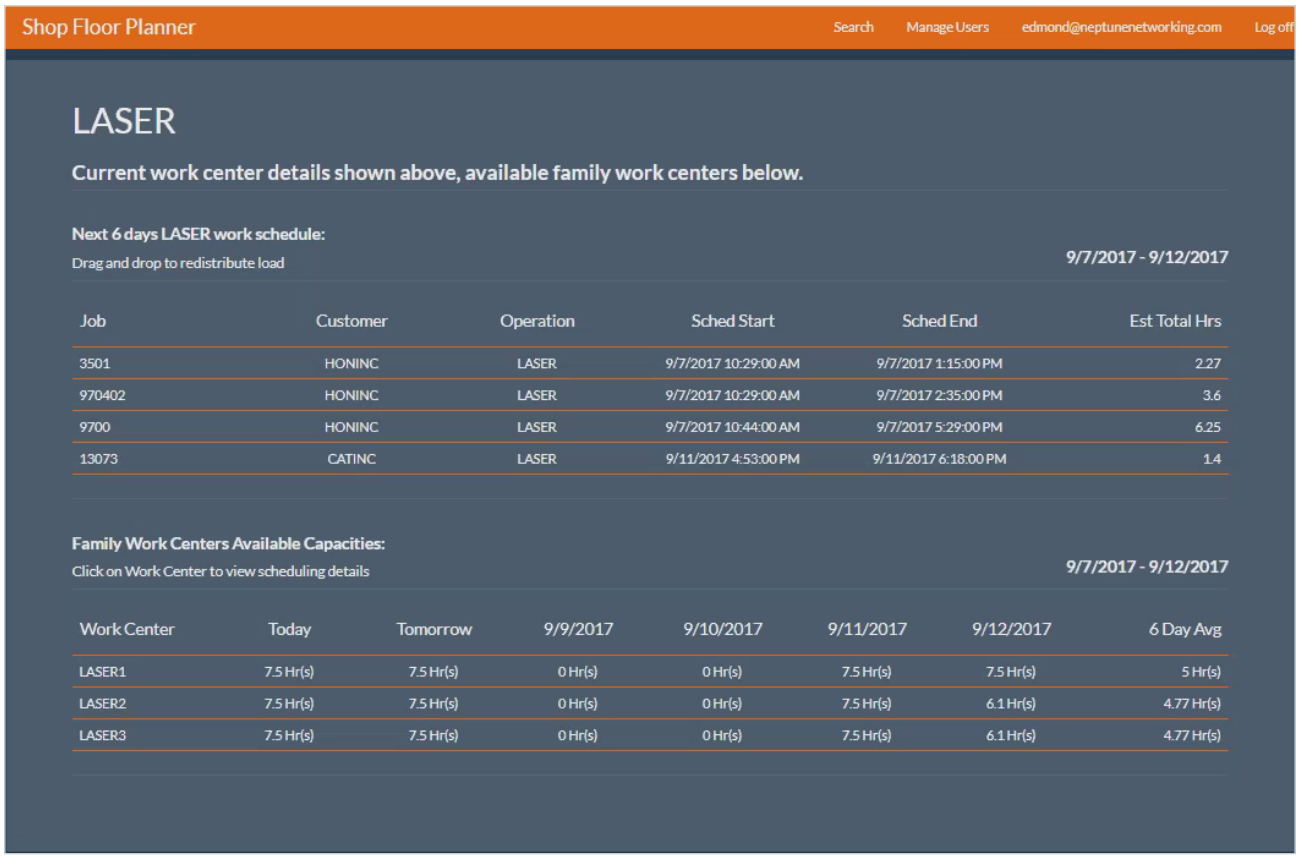
TRAINING GUIDE

Shop Floor Planner

Find scheduled work. Assign the resource. Verify the result.

Shop Floor Planner is a browser application for assigning JobBOSS operations to the work centers that will perform them. It shows scheduled work and available capacity, then updates the selected operation and its existing load when you change the assignment.



Recognize Shop Floor Planner by its title, operation list and work-center capacity view. This genuine public demonstration shows an earlier layout; current date filters and additional views are explained here.

A drop or Change WC button applies the move immediately. There is no separate Save step. The operation keeps its scheduled dates; refresh and verify the destination after the move.

Begin with the first complete assignment on page 2. Complete Prev is a separate routing action, explained on page 9.

QUICK START

Your first complete assignment

Choose one understood open operation and a suitable child work center.

1. **Prepare the example**
   Use the intended Shop Floor Planner site and database. Choose an approved training example or a small authorized live assignment. Confirm the operation’s current work center, scheduled dates and intended destination.

2. **Sign in and find the work**
   Use the site account supplied by your administrator. Enter the Work Center or Job Number on Search, or open the appropriate Work Center Families tile.

3. **Review the operation and capacity**
   Confirm the job and operation, then compare destination capacity on the same scheduled dates. Choose a resource that can perform the work and confirm the installed recost policy.

4. **Apply one assignment**
   Drag the operation row onto the destination work-center row, or open the operation and use its destination button under Change WC. This writes the move directly.

5. **Refresh and verify**
   Reopen or refresh the source and destination views. Confirm the operation’s destination in JobBOSS and that its existing load moved with the dates retained. Review estimate values if recosting is enabled.

6. **Hand off the work**
   Confirm the intended resource is visible to the people executing the job. Check Data Collection where used and communicate the assignment through your normal floor process.

Find the detailed task

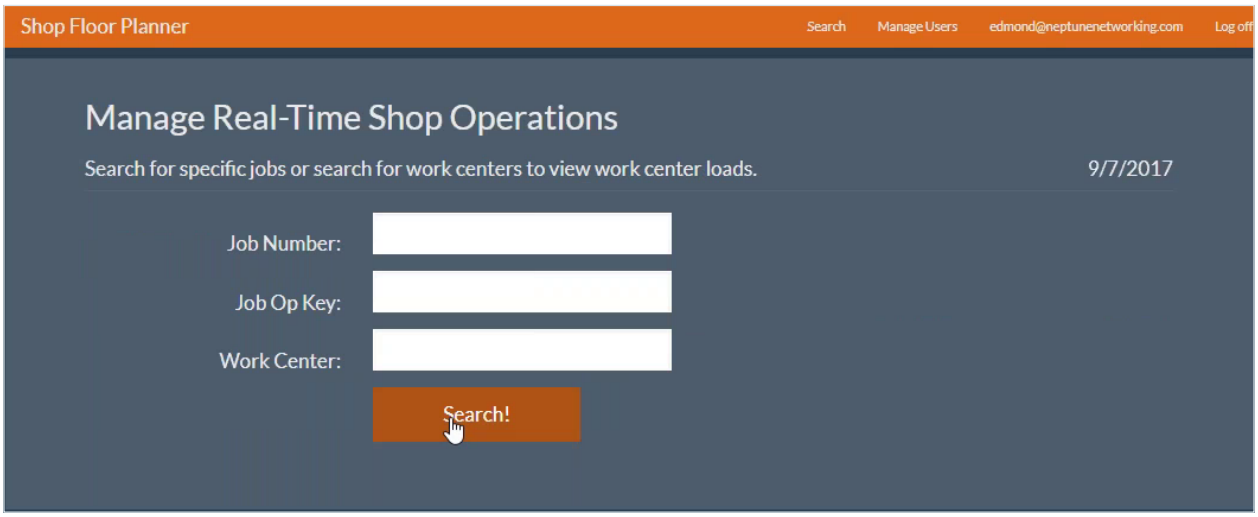
Access and search: 3 · Families: 4 · Dates and capacity: 5-6
Drag and drop: 7 · Change WC: 8 · Complete Prev: 9
Recost and verification: 10 · Setup: 11 · Exceptions: 12 · Practice: 13

ACCESS AND SEARCH

Sign in and find the operation

Use the installed site address and one deliberate search field.

Open the address supplied for your installation. Ordinary accounts use an active JobBOSS Employee ID and a separate site password. On the login page, enter **JobBoss Employee** and **Password**, then choose **Log in**. Ask the administrator if an account or password reset is needed.



The public demonstration Search screen provides Job Number, Job Op Key and Work Center fields.

Search field	Use it to open
Job Number	The exact job and its inside-operation list. Enter the identifier as used in JobBOSS.
Job Op Key	One specific operation using its numeric operation key. This is not the routing sequence number.
Work Center	The exact work center’s scheduled-operation and capacity overview.

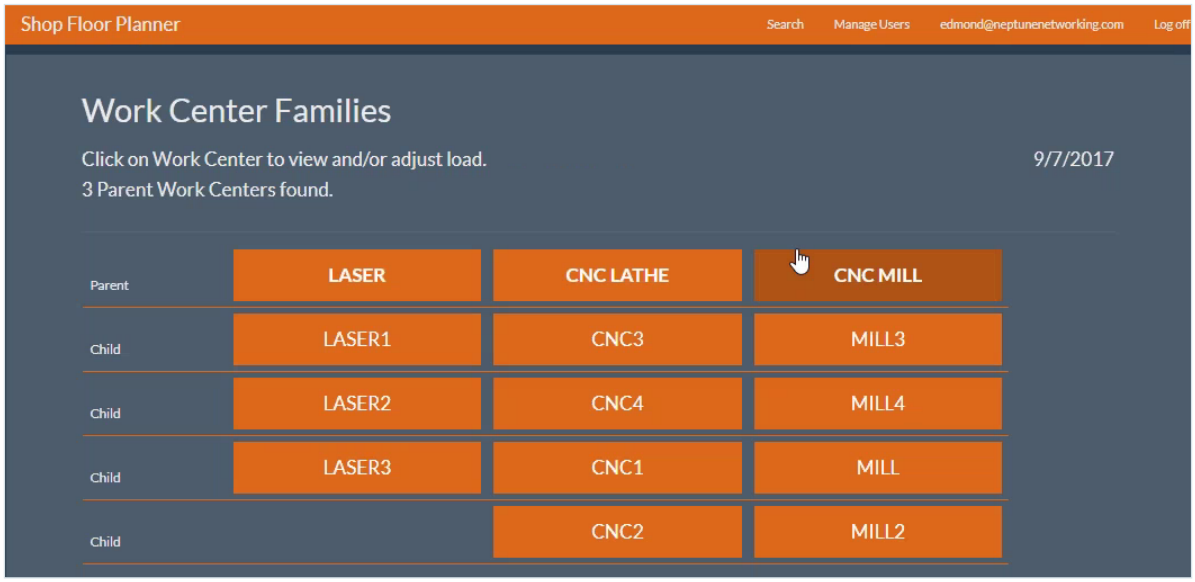
Enter the intended identifier and choose **Search!**. Use one field at a time. If several fields contain matches, the search checks Work Center first, Job Number next and Job Op Key last.

A blank search or a search with no matching record opens **Work Center Families**. If you expected one job or operation, check the identifier rather than treating that page as a matching result. A suitable scanner can enter an identifier into the selected field where the site’s barcodes are configured.

CHOOSE THE RESOURCE GROUP

Understand work-center families

A parent identifies the capability group; a child identifies the resource.



The recorded example groups LASER, CNC LATHE and CNC MILL with their child resources. Select a work center to inspect its work and capacity.

Term	Meaning in the workflow
Parent work center	A planning group or capability family used when the exact machine has not yet been chosen.
Child work center	The machine, cell or resource that receives the operation assignment.
Sibling	Another child in the same family. Compare its availability and suitability when redistributing work.
Unrelated work center	An alternative outside the current family. Confirm that it is appropriate for the process before assigning work.

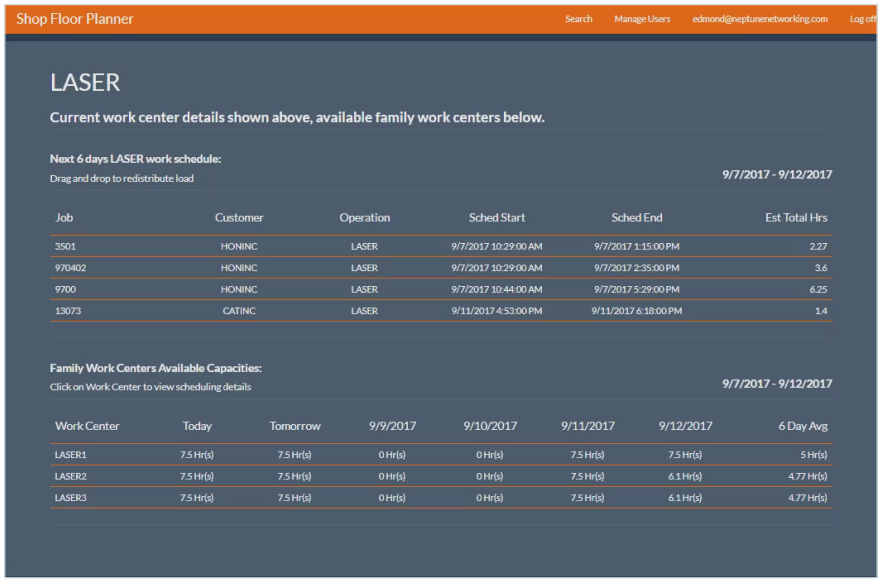
Work-center groups come from JobBOSS. If a resource or relationship is missing, have the setup contact check the hierarchy.

Select the parent to work through its unassigned group-level operations, or select a child to review work already assigned to that resource. Current builds can also show an **UNRELATED** group; the recorded image predates that addition.

OPERATION LIST AND DATE SCOPE

Read the work-center overview

The operation filter and the capacity period are separate controls.



The recorded layout shows the operation list above the family capacity table. Current builds also provide Start Date Range, End Date Range and SEARCH controls.

Area or field	How to use it
Job / Customer / Operation	Identify the exact work. One row is an operation; moving it does not move the whole routing.
Sched Start / Sched End	Check the scheduled timing that will be retained when the resource changes.
Est Total Hrs	The operation’s estimated hours. Review the actual scheduled load as well, especially when work spans several days.
Start Date Range / End Date Range	Set the operation-list period, then use SEARCH. The filter uses scheduled start dates.
Current default list	The reviewed build starts with yesterday through 14 days ahead and Open/Started operations, subject to the installed firm-zone filter.

Filtering changes what you see; it does not reschedule work. If an operation is missing, check its work center, scheduled start, status and firm-zone treatment with the scheduler. Recheck the displayed dates after navigating away or using the capacity arrows.

DAILY AVAILABILITY AND LOAD

Compare capacity on the right date

Use the date headings and the operation’s existing load together.

Display	Meaning
Available hours in the overview	Daily capacity remaining after the configured scheduled load. The view converts its minute values to hours.
Capacity	The work center’s configured capacity for the displayed date, based on the installed scheduling data and resource/shift setup.
Load	The scheduled load shown for the work center and date.
Capacity Avail	Capacity remaining after load. A negative value indicates the displayed load exceeds that capacity.
Load % / Capacity Avail %	The relationship between scheduled load and capacity on the operation-detail view. Compare the actual date and resource before acting.

Navigate the capacity period deliberately

Current overview capacity tables show seven dated columns. The left and right arrows move that capacity view by a week. This is separate from the operation-list date filter above; arrow navigation can restore the list’s default dates, so recheck them.

Match the displayed date to the operation

Operation detail initially uses the scheduled start date for its capacity comparison. When that date has no matching capacity data, fallback data may be shown. Read the displayed capacity date rather than assuming it always equals Sched Start.

For an operation with load on more than one day, review the destination across those days. A single favorable daily value does not describe the whole assignment.

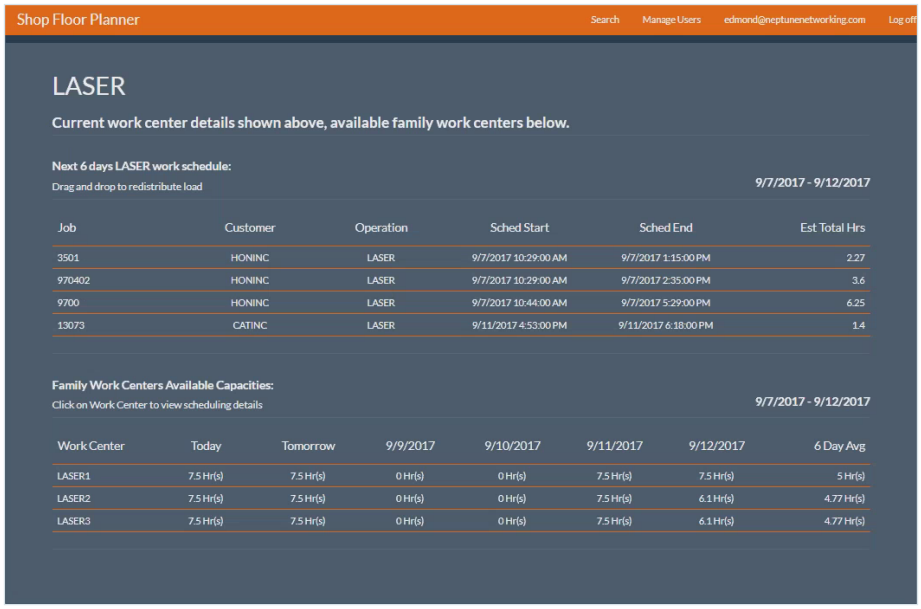
Use capacity to inform the choice

Confirm the destination can perform the operation and has the needed tooling, people and material. Negative availability is a useful overload signal; it does not itself prevent the move. Use JobBOSS scheduling when the dates or load plan need to change.

WORK-CENTER PROCEDURE

Move an operation by dragging its row

Drop onto the intended destination work-center row.



Operation rows appear above the destination capacity rows. This is the drag-and-drop workflow demonstrated in the recording.

1. **Refresh and identify**
   Open the source work center with a current view. Confirm the job, operation, dates and destination. Coordinate with anyone else changing the same operation.

2. **Drag to the destination**
   Drag the operation row onto the intended work-center row in the family or unrelated table. Read the destination before releasing it. Dropping over a day cell still selects the work center; it does not change the date.

3. **Allow the update to finish**
   The drop immediately updates the operation and its existing schedule-load work-center references. No separate Save or approval screen follows.

4. **Verify the assignment**
   The page returns to the source work center. Open the destination or job again and confirm the new assignment and retained dates. Recheck filters if the list looks different.

Use the operation-detail buttons on page 8 when that method is more convenient on your device. Both methods apply the same work-center change.

CHANGE WC PROCEDURE

Assign from the operation detail

Review one operation and choose its destination button.



The public demonstration shows operation dates, estimated hours, capacity measures and destination buttons in the Change WC column.

1. **Open and check the operation**
   Search its Job Op Key or open an Open/Started operation with a scheduled start from the job list. Confirm the job, work center, schedule and displayed capacity date.

2. **Choose the destination**
   Review the family and, where available, unrelated work-center options. Select the intended work-center button under Change WC to apply the reassignment immediately.

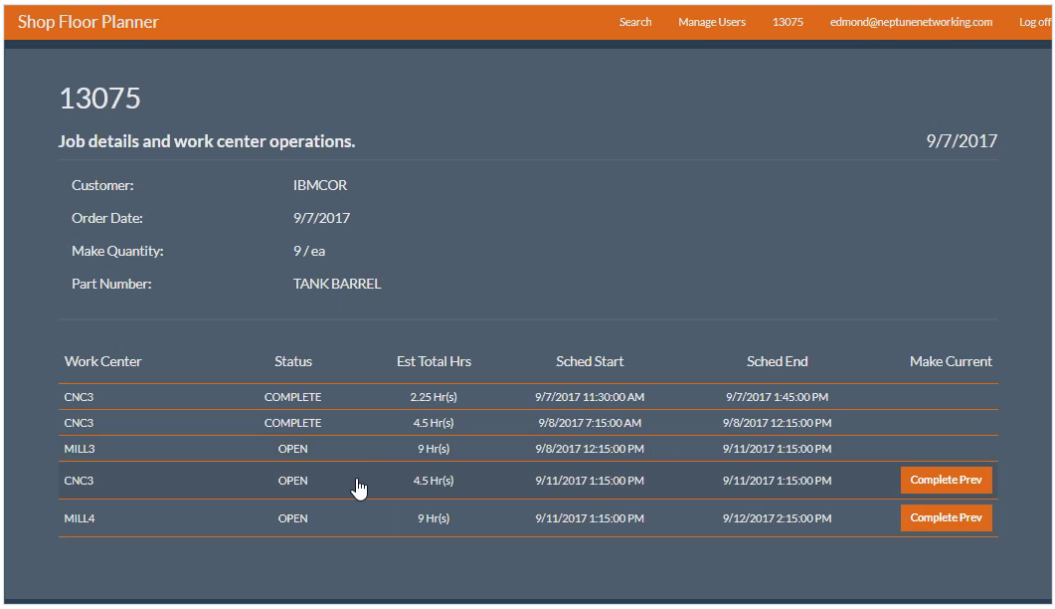
3. **Review the returned job**
   The operation-detail path returns to the job view after the change. Confirm the destination, then check its load and dates in JobBOSS. Review estimate values according to the installed recost policy.

A destination button changes the selected operation’s work-center assignment. Use JobBOSS scheduling for date changes and the separate Complete Prev action only for finished earlier routing work.

A SEPARATE ROUTING ACTION

Review the job and use Complete Prev

Complete Prev changes earlier operations, not the selected operation.



Job detail in the public demonstration lists inside operations and shows Complete Prev actions beside eligible rows.

The job view shows the customer, order date, make quantity, part number and inside-operation list. Select an operation’s work center to open its detail and assignment choices.

What Complete Prev does

Selecting **Complete Prev** immediately sets every earlier-sequence operation on that job that is not already complete to **Complete** and removes its matching scheduled load. The selected operation remains unchanged.

Check the full earlier route first. The action can include outside operations even though the visible list contains inside operations. Confirm that the preceding work is actually finished before using it.

Use and verify the action

Review the earlier operations in JobBOSS, finish the required production reporting, then use Complete Prev on the intended later step. After the page returns, confirm the earlier statuses and removed load in JobBOSS.

This action does not enter labor, completed quantities, material transactions or outside-service receipts for you. It is also separate from moving the selected operation to another work center.

JOBBOSS RESULT REVIEW

Verify the move and estimate behavior

Confirm the assignment, load and configured estimate effect together.

Review	Expected result
Selected operation	The destination work center is correct. The operation’s sequence and scheduled start/end dates remain as intended.
Existing scheduled load	The operation’s existing load segments are assigned to the destination work center, retaining their dates and durations. Check all relevant days.
Source and destination views	Refresh or reopen them to see the reassignment. A changed list alone is not the complete verification.
Data Collection and floor direction	Confirm the assignment appears for the people executing the work. Coordinate existing time-entry activity if moving a Started operation.
Operation estimate	Check whether estimated components changed according to the site’s recost setting. A resource move does not rewrite already posted actual labor.

Understand optional recosting

The site setting **Recost Job Operation after moving work centers** can recalculate operation estimated setup/run labor and burden components using destination-center rates. Confirm the installed policy with the setup contact before the first move.

With recost off, those estimated components are retained by the move. With it on, verify the affected operation values. This path is not a full job-header recost and does not change previously posted actual labor.

Use the recorded change when following up

The utility records the user/employee, operation, old and new values, change type and time in its audit data. Ask the setup contact for that evidence when investigating a result; the normal Planner screens do not provide an audit-history viewer or Undo command.

ADMINISTRATOR AND TEAM HANDOFF

Prepare access and the operating setup

Keep the site, work-center structure and recost policy clear.

Setup item	What to establish
Site and database	Provide the installed browser address and network access. Confirm the intended JobBOSS database before users begin assigning work.
User accounts	The administrator uses Manage Users and Register New User for site accounts tied to active JobBOSS Employee IDs. Use the supplied site password.
Password assistance	The administrator can use Reset Password. A signed-in user can select their username and Change your password.
Parent and child resources	Maintain the work-center families in JobBOSS. Check the resource names and relationships that should appear in Planner.
Capacity setup	Confirm the installed scheduling views and the relevant work-center resources, shifts and dates. Reconcile a representative day before relying on the figures.
Recost policy	Have the setup contact confirm the global setting and its installed persistence, including after an application restart. It is not a separate per-move checkbox.
Operating ownership	Agree who assigns resources, who changes schedule dates and who checks the result. Coordinate changes to the same operation.

Work from a suitable device

Use a computer or mobile device that can reach the installed site and display the working tables clearly. Try the assignment controls on the intended device during training; the operation-detail buttons provide an alternative to dragging.

The administrator maintains site access; JobBOSS remains the source for employee and work-center records. Ask the setup contact to resolve a connection, account or hierarchy issue rather than entering guessed server details or creating duplicate records.

PRACTICAL TROUBLESHOOTING

Resolve missing work or an unclear move

Check the selected record and its actual JobBOSS state before another action.

Question or symptom	Useful next step
Search opens Work Center Families	The search was blank or no exact record matched. Recheck the correct field and identifier; clear the other search fields.
An expected operation is missing	Check the exact work center, Open/Started status, scheduled-start range and firm-zone treatment. A completed or differently dated operation may be outside the list.
The date range changed after navigation	Capacity arrows and operation-list dates are separate. Recheck Start Date Range/End Date Range and use SEARCH again if needed.
Capacity is zero, negative or unexpected	Check the displayed date, underlying load, resources and shifts with the setup contact. A negative available value signals displayed overload.
Operation detail shows another capacity date	The scheduled date may lack matching capacity data. Verify the date heading and inspect the intended date in JobBOSS before assigning work.
The operation moved but its dates did not	That is the intended assignment behavior. Use JobBOSS scheduling when the dates need changing.
A move reports an error or has an unclear result	Record the job/operation, source, destination, time and message. Refresh and inspect the operation and load in JobBOSS before retrying.
Complete Prev changed more than expected	Review all earlier-sequence operations, including outside steps. Retain the event details and have the responsible contact determine the correction.

For follow-up, include the job number, numeric operation key, old and intended work centers, displayed dates, exact message and what JobBOSS shows now. Avoid repeated moves or using the browser Back button as a way to undo a completed change.

TRAINING EXERCISE

Practice one parent-to-child assignment

Use an approved training example or a small, understood live assignment.

Choose one open operation assigned to a parent group, such as **LASER**, and a suitable child such as **LASER2**. Record the operation key, scheduled dates and existing load. Use actual resources from your setup; the names here are illustrative.

Illustrative one-day example	Before assignment	After assignment
Destination daily capacity	10.0 hours	10.0 hours
Destination scheduled load	6.0 hours	8.0 hours
Destination available capacity	4.0 hours	2.0 hours
Operation being reassigned	2.0 hours of load at parent	Same 2.0 hours at child

The illustration assumes all two hours of existing load fall on the same day, with no other changes. Actual figures come from the installed capacity view and scheduled load. An assignment changes the resource; it does not shift those hours to a different date.

1. **Identify and compare**
   Find the operation and confirm its destination, dates and recost policy. Compare the relevant capacity period before acting.

2. **Make the assignment**
   Use one drag/drop or one Change WC destination button. Allow the page to finish returning.

3. **Verify and explain**
   Confirm the new work center, existing load at the destination, unchanged dates and expected estimate effect. Check the execution view where Data Collection is used.

The exercise is complete when the operator can explain

- Which operation changed, where its load went and why the schedule dates stayed in place.
- Which action saved the move, how the result was checked and why Complete Prev was not needed for this assignment.
- How to find a missing operation and when to return a date change to the scheduler.

RESOURCES AND OPERATING CHECKLIST

Keep the guide and demonstration together

Make the next assignment easy to repeat and verify.

Before and after an assignment

- **Before:** correct job and operation; current source view; intended destination; relevant capacity dates; confirmed recost policy.
- **After:** destination and existing load verified; dates retained; estimate effect understood; floor direction and Data Collection aligned where used.
- **For Complete Prev:** full earlier route reviewed; preceding work finished and reported; earlier statuses and load checked after the action.

Watch the Shop Floor Planner demonstration

The approximately 23-minute recording shows an earlier application layout. Use these visual landmarks with the current guide for date filters, additional views and exact operating scope.

View in the recording	Approximate point
Work Center Families	6:40
Search by job, operation key or work center	7:10
Work-center operation and capacity overview	10:50
Job detail and Complete Prev controls	12:50
Operation detail and Change WC destinations	13:20
Application shown on a tablet	14:05

Product overview: Neptune-Shop-Floor-Planner-Marketing.pdf introduces the business use, work-center families, supported capabilities and learning resources.

Contact Neptune for setup or training assistance

Have the site context, job/operation details and your question or exact status message ready.

Prepared from the utility source, original guides, relevant historical Fireflies discussion and the supplied public demonstration. Images are genuine recorded application captures. Revision 2026-11-04.