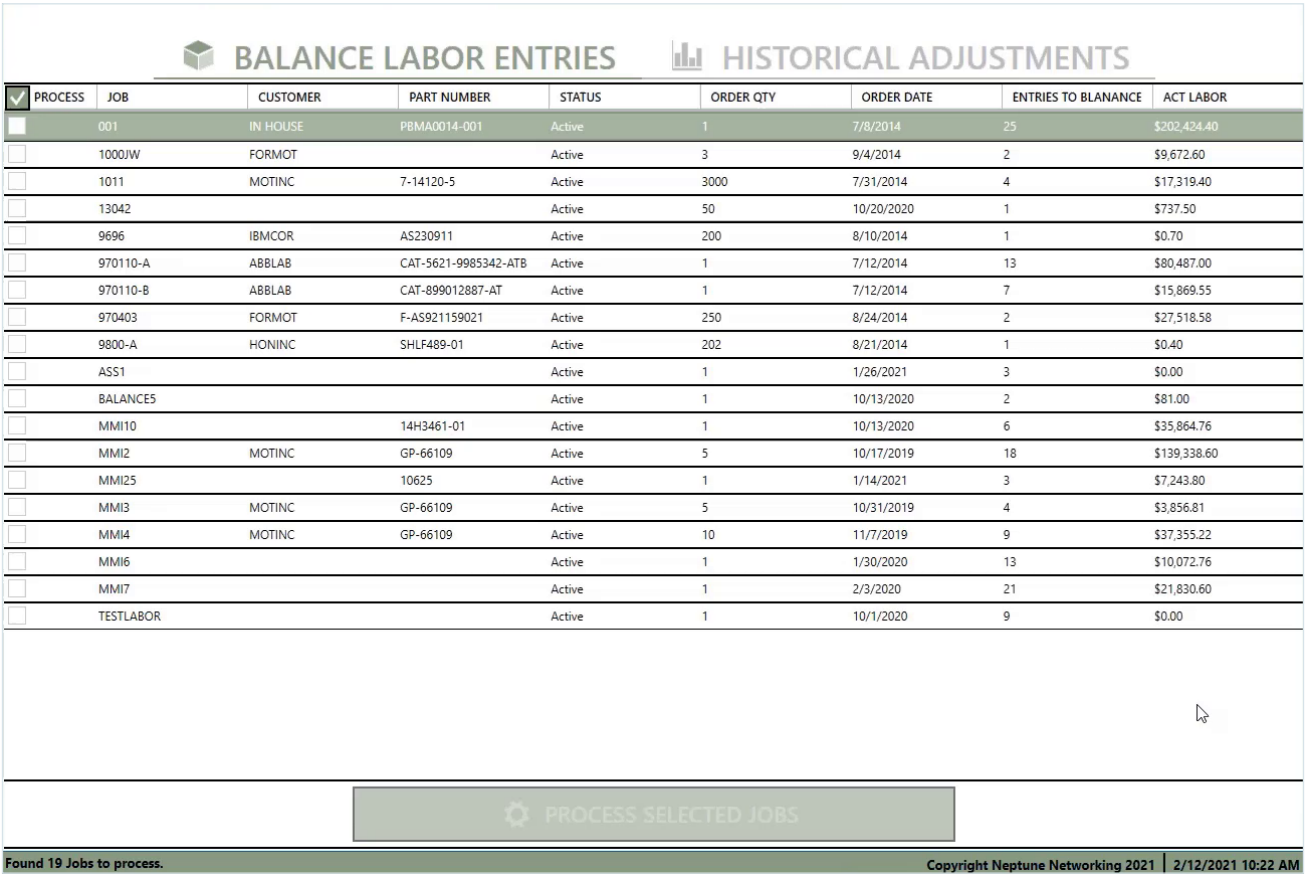
TRAINING GUIDE

# Weighted Labor Balancing

Select the work. Allocate shared time. Verify the JobBOSS result.

Weighted Labor Balancing allocates one employee's overlapping, timestamped job labor across concurrent entries. This guide explains the calculation, the two installed configurations, manual processing, historical review and scheduled operation.




| PROCESS | JOB | CUSTOMER | PART NUMBER | STATUS | ORDER QTY | ORDER DATE | ENTRIES TO BLANANCE | ACT LABOR |
|---|---|---|---|---|---|---|---|---|
| | 001 | IN HOUSE | PBMA0014-001 | Active | 1 | 7/8/2014 | 25 | $202,424.40 |
| | 1000JW | FORMOT | | Active | 3 | 9/4/2014 | 2 | $9,672.60 |
| | 1011 | MOTINC | 7-14120-5 | Active | 3000 | 7/31/2014 | 4 | $17,319.40 |
| | 13042 | | | Active | 50 | 10/20/2020 | 1 | $737.50 |
| | 9696 | IBMCOR | AS230911 | Active | 200 | 8/10/2014 | 1 | $0.70 |
| | 970110-A | ABBLAB | CAT-5621-9985342-ATB | Active | 1 | 7/12/2014 | 13 | $80,487.00 |
| | 970110-B | ABBLAB | CAT-899012887-AT | Active | 1 | 7/12/2014 | 7 | $15,869.55 |
| | 970403 | FORMOT | F-AS921159021 | Active | 250 | 8/24/2014 | 2 | $27,518.58 |
| | 9800-A | HONINC | SHLF489-01 | Active | 202 | 8/21/2014 | 1 | $0.40 |
| | ASS1 | | | Active | 1 | 1/26/2021 | 3 | $0.00 |
| | BALANCE5 | | | Active | 1 | 10/13/2020 | 2 | $81.00 |
| | MMI10 | | 14H3461-01 | Active | 1 | 10/13/2020 | 6 | $35,864.76 |
| | MMI2 | MOTINC | GP-66109 | Active | 5 | 10/17/2019 | 18 | $139,338.60 |
| | MMI25 | | 10625 | Active | 1 | 1/14/2021 | 3 | $7,243.80 |
| | MMI3 | MOTINC | GP-66109 | Active | 5 | 10/31/2019 | 4 | $3,856.81 |
| | MMI4 | MOTINC | GP-66109 | Active | 10 | 11/7/2019 | 9 | $37,355.22 |
| | MMI6 | | | Active | 1 | 1/30/2020 | 13 | $10,072.76 |
| | MMI7 | | | Active | 1 | 2/3/2020 | 21 | $21,830.60 |
| | TESTLABOR | | | Active | 1 | 10/1/2020 | 9 | $0.00 |

Recognize the application: Balance Labor Entries, Historical Adjustments, job checkboxes and Process Selected Jobs. Public demonstration image; both configurations share this workflow.

**PROCESS SELECTED JOBS writes to JobBOSS.** Review the selection before processing, then check the completion status, historical event and affected JobBOSS records.

Start with the complete first run on page 2. Confirm the installed configuration on page 3 and use the operating checklist on page 15.

QUICK START

# Your first complete run

Use a small, understood set of completed overlapping entries.

1. **Confirm the starting scope**
   Use the intended database and installed configuration. Agree on the effective date and identify earlier manual corrections. Choose an approved training example or a small authorized live job.

2. **Check the source entries**
   In JobBOSS, identify the employee, operations and original start and stop times. Wait until all relevant concurrent entries have closed; the overall job can still be active.

3. **Refresh and select**
   Open the configured utility shortcut, use REFRESH DATA and open BALANCE LABOR ENTRIES. Check the PROCESS box for the intended job. A highlighted row alone is not selected work.

4. **Process the selection**
   Choose PROCESS SELECTED JOBS and allow the run to finish. This applies changes directly. Read the completion status and retain any error details.

5. **Review the event**
   Use REFRESH DATA, open HISTORICAL ADJUSTMENTS and choose the new process event. Select the job and inspect its before-and-after totals and employee/operation details.

6. **Verify and establish the routine**
   Compare representative labor and operation results in JobBOSS with the expected allocation and machine-hour treatment. Resolve any exception before another attempt. Then repeat with newly eligible work or establish the agreed schedule.

## Find the detailed procedure

Allocation: 4 · Queue and processing: 5–6 · History and verification: 7–8
Eligibility: 9 · Scheduling and setup: 10–11 · Exceptions: 12 · Practice: 13

BEFORE THE FIRST RUN

# Confirm the configuration and handoff

Set the calculation and the starting scope deliberately.

| Installed configuration | Operation machine-hour behavior |
|---|---|
| Labor-hour balancing | Employee labor is allocated across concurrent entries. Operation setup and run machine-hour totals are retained. This suits work where equipment continues running while the employee attends another operation. |
| Labor-and-machine-hour balancing | Employee labor and operation machine hours are allocated across concurrent entries. Confirm that this matches the way the shop intends to record its production time. |

These are descriptive configuration names. The installed package determines the calculation; APP SETTINGS does not switch between them. Both configurations update related transaction-level labor and machine-hour fields. The distinction above is specifically about operation setup and run totals.

## Agree on these items with the setup contact

- **Database and operating owner.** Confirm the intended JobBOSS database, who runs or monitors the utility and who reviews the results.
- **Effective date and lookback.** Establish which completed entries are eligible and how the configured date window handles late or overnight work.
- **Earlier corrections.** Identify entries already adjusted manually. A manual correction does not automatically create a utility history record or prevent selection.
- **Job scope.** Confirm candidate-job exclusions, including any indirect work. An excluded job may still form part of the employee’s overlapping context.
- **Representative examples.** Include normal overlaps and, where relevant, shift breaks or overnight entries. Review the installed results before enabling a recurring schedule.

CALCULATION EXAMPLE

# Understand how time is allocated

The divisor changes as the employee’s concurrent entries start and stop.

For each period within an eligible entry, the utility divides the elapsed time by the number of that employee’s concurrent entries, including the entry being calculated. The count is of entries, not distinct job names. Two operations on the same job can therefore overlap.

## Start with one shared hour

One employee has two eligible operations active for the same complete hour. Each receives **30 minutes** of allocated labor. Two recorded hours across the entries become one hour of allocated labor.

## Then allow the overlap to change

| Time period | Active entries | Allocation to A | Allocation to B |
|---|---|---|---|
| 08:00–10:00 | A only | 2.00 hours | — |
| 10:00–12:00 | A and B | 1.00 hour | 1.00 hour |
| Total allocated labor | A: 08:00–12:00; B: 10:00–12:00 | 3.00 hours | 1.00 hour |

The original entries contain six recorded hours in total. The example allocates four hours of the employee’s elapsed time: three to A and one to B. It assumes completed eligible entries and no break deduction.

## What stays the same, and what can affect the result

- Original start and stop timestamps remain. The utility changes the allocated hours and related costs, using the recorded rates.
- The calculation does not use operator-entered percentages, employee skill ratings, job priority or piece quantities as weights.
- Installed rounding and shift-break treatment can affect a detailed comparison. Verify representative break and overnight examples with the installed setup.

This is a job-labor allocation. Attendance and payroll are separate records; a lower allocated job cost is not a reduction in payroll paid.

BALANCE LABOR ENTRIES

# Read the eligible job list

Use the selection boxes and interpret each column on its own basis.




| PROCESS | JOB | CUSTOMER | PART NUMBER | STATUS | ORDER QTY | ORDER DATE | ENTRIES TO BLANANCE | ACT LABOR |
|---|---|---|---|---|---|---|---|---|
| ☑ | 001 | IN HOUSE | PBMA0014-001 | Active | 1 | 7/8/2014 | 25 | $202,424.40 |
| ☐ | 1000JW | FORMOT | | Active | 3 | 9/4/2014 | 2 | $9,672.60 |
| ☐ | 1011 | MOTINC | 7-14120-5 | Active | 3000 | 7/31/2014 | 4 | $17,319.40 |
| ☐ | 13042 | | | Active | 50 | 10/20/2020 | 1 | $737.50 |
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| ☐ | 970403 | FORMOT | F-AS921159021 | Active | 250 | 8/24/2014 | 2 | $27,518.58 |
| ☐ | 9800-A | HONINC | SHLF489-01 | Active | 202 | 8/21/2014 | 1 | $0.40 |

A closer view from the public demonstration. The checked PROCESS box selects the job; the shaded row alone does not.

| Column or control | What to check |
|---|---|
| PROCESS | Check each job to include. The header selection control selects or clears the list; review the full scope before using it. |
| JOB / CUSTOMER / PART NUMBER | Confirm the intended job and recognizable work. The displayed list is job-level; allocation is calculated from the underlying labor entries. |
| STATUS / ORDER QTY | Job context. An Active job can be eligible when the relevant concurrent labor entries have closed. |
| ORDER DATE | The job’s order date. It is not the labor-entry date or the date of the overlap. |
| Entries-to-balance indicator | An indicator of eligible overlapping work associated with the job. Check the underlying entries for scope. The demonstration heading reads “ENTRIES TO BLANANCE.” |
| ACT LABOR | The JobBOSS base actual-labor amount. Historical totals also include burdens, so the two displays need not match. |

Use **REFRESH DATA** before selecting work. If the list appears stale or disagrees with a just-completed run, reopen the utility and check the underlying job data before processing again.

MANUAL OPERATION

# Process the intended selection

The processing button performs the live calculation and update.




The processing control and status area from the public demonstration. Review the job checkboxes before using this control.

1. **Check the current batch**
   Confirm the database, candidate jobs and effective scope. Clear any unintended PROCESS boxes. Complete the relevant concurrent labor entries first and coordinate with any scheduled run.

2. **Apply the calculation**
   Choose PROCESS SELECTED JOBS. There is no separate preview-and-accept stage after this action. Allow processing to finish before starting another run or closing the working session.

3. **Read the outcome**
   Read the status message and retain any error text with the job IDs and approximate run time. Jobs disappearing from the in-memory selection is not, by itself, proof that every write completed.

4. **Refresh, review and verify**
   Use REFRESH DATA, open Historical Adjustments and choose the event. Review the recorded results, then verify the affected JobBOSS values as described on page 8.

## Use one coordinated processing routine

Run a small, understood batch for initial training. As the routine becomes established, select the intended current work or let the configured schedule process eligible jobs. Avoid simultaneous manual and scheduled runs over the same scope.

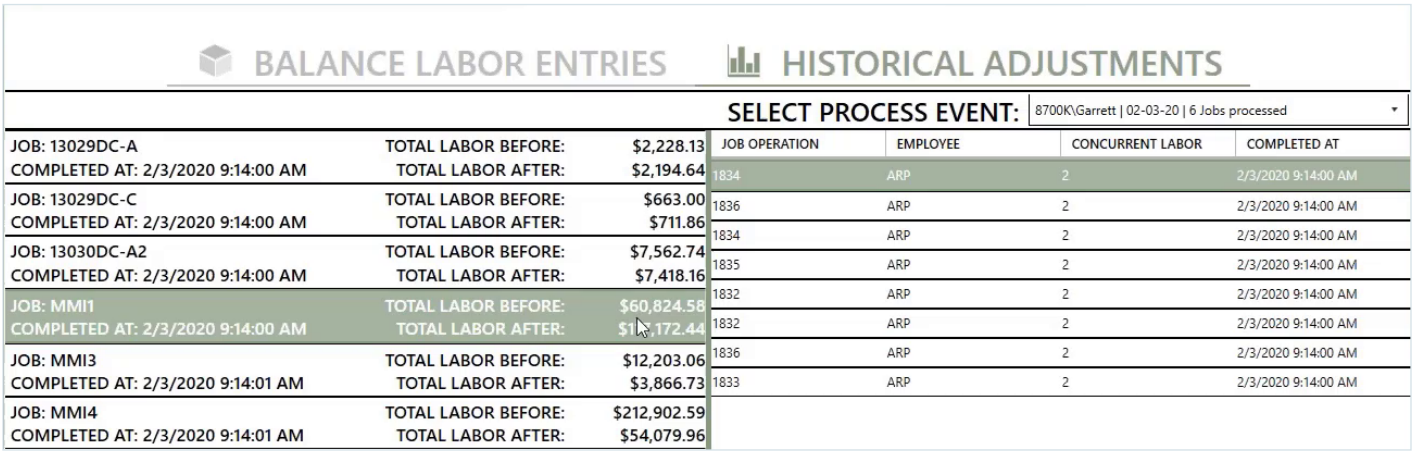
## If processing reports an error

Treat the batch as requiring review. Some changes may have completed. Retain the evidence, inspect the affected records and resolve the exception with the setup contact before retrying. Use the procedure on page 12.

RECORDED PROCESS EVENTS

# Review Historical Adjustments

Choose the event, then inspect the job and its detail rows.




The public demonstration shows the event selector, job totals on the left and operation/employee details on the right.

1. **Open the relevant event**
   Use REFRESH DATA, open HISTORICAL ADJUSTMENTS and select a process event. The list is newest first. The label includes the run identity, a date and the number of jobs; use the job completion details to distinguish runs on the same day.

2. **Select the job**
   Choose the job in the left pane. Review JOB, COMPLETED AT, TOTAL LABOR BEFORE and TOTAL LABOR AFTER. Record the job and event when a result needs follow-up.

3. **Review the entry details**
   The right pane shows JOB OPERATION, EMPLOYEE, CONCURRENT LABOR and COMPLETED AT. Concurrent Labor is a recorded reference; do not assume it is a constant divisor for every moment of the entry.

## Compare totals on the same basis

**History total:** base actual labor plus labor burden, machine burden and G&A burden.
**Queue ACT LABOR:** base actual labor only. A difference between these displays does not, by itself, indicate a calculation error.

History records the run for review. Complete the verification in JobBOSS as well, especially if the run reported an error or a result is unexpected.

CLOSE THE REVIEW LOOP

# Verify the result in JobBOSS

Use representative entries and compare equivalent fields.

| Check | Expected review |
| --- | --- |
| Employee and source timing | Confirm the intended employee and the original start and stop times. Those timestamps remain the basis for understanding the overlap. |
| Allocated labor | Compare the affected completed entries with the expected time-slice allocation. Allow for the installed rounding and shift-break treatment. |
| Operation setup and run values | Confirm the labor hours and related values on the affected operations. Check machine-hour behavior against the installed configuration. |
| Operation machine hours | Labor-hour balancing retains operation setup/run machine-hour totals. Labor-and-machine-hour balancing allocates those totals as well. |
| Job and burden totals | Review base labor and the related labor, machine and G&A; burdens on a like-for-like basis. The utility recalculates affected costs using the recorded rates. |
| History and completion status | Match the selected event and job with the live JobBOSS result. A completion timestamp is useful evidence, but it does not replace checking the persisted values after an error. |

## Use the assessment report when it is installed

The original package includes audit and overlapping-labor assessment report assets. A configured report can help trace employees, operations, timing and recalculated values. The public demonstration shows the report in JobBOSS; availability and the menu location depend on the installation.

The report is a separate review aid. The utility’s processing button does not become a preview or approval step because a report is available.

## Finish with an understood outcome

Confirm that the intended entries were allocated, the installed machine-hour behavior was followed and any exception has an owner. Retain the useful run/job reference with your normal operating notes.

ELIGIBILITY AND SCOPE

# Understand missing and returning work

An eligible entry needs more than a job number and an elapsed quantity.

| Situation | What it means for the operator |
|---|---|
| Completed start-and-stop labor | The utility uses recorded start and stop times for the same employee and positive overlap. Entries that only touch at an endpoint do not share elapsed time. |
| Another concurrent entry is still open | Wait until the relevant concurrent work has closed. An open entry is not available to the completed-entry calculation in the same way. |
| Elapsed hours without timestamps | These do not provide the start-and-stop timing needed for allocation. Review the time-entry method with the setup contact. |
| The job is still Active | Job completion is not required. Eligibility depends on the underlying entries and configured scope. |
| Previously processed job returns | New eligible overlapping entries can bring the same job back. Review the current source entries and earlier results before processing. |
| Previously corrected manually | The correction does not automatically mark the entry as utility-processed. Agree on the effective start date and handoff before running it. |
| Expected entry is missing | Check closure, employee/timestamps, date window, candidate-job exclusions and earlier utility history. Confirm the intended database and refresh or reopen the list. |
| Late or overnight work | Review it against the configured date window. A narrow rolling window can miss work; eligibility is not a permanent queue that holds every entry indefinitely. |

Do not infer labor scope from ORDER DATE in the queue. That column is the job order date. The installation’s labor-date rules and exclusions determine the actual candidate work.

RECURRING OPERATION

# Run on a configured schedule

A Windows scheduled task can process eligible jobs without opening the UI.

1. **Confirm the installed task**
   Have the setup contact confirm the executable path, Windows account, database connection and trigger. Scheduled operation launches the configured executable with the ALL argument.

2. **Choose timing that fits the work**
   Schedule after the relevant concurrent entries are normally closed. Account for shift patterns, late entries, overnight work and the configured date window.

3. **Coordinate manual runs**
   Define who may run selected jobs during the day and avoid overlap with the scheduled task. Manual and scheduled operation use the same installed calculation.

4. **Verify execution and the data**
   Check the scheduled task’s last-run time and result. When eligible work was expected, also inspect the utility’s history and representative JobBOSS results.

5. **Recheck after environment changes**
   After a server move, task-account change, password change or reboot that affects the task, confirm the next expected execution and its result.

## Interpret the evidence together

| Observation | Practical interpretation |
|---|---|
| Task reports successful execution | Confirm the resulting data when work was expected. The task result alone does not verify every job update. |
| No new process event | A run with no eligible jobs creates no new event. Check eligibility and task execution before deciding it failed. |
| Expected work remains missing | Review account/connection, trigger, date window and closed entries, then use the exception procedure. |

ADMINISTRATOR HANDOFF

# Maintain the connection and setup

Use the installation’s approved values and preserve its processing scope.

Open the configured desktop shortcut. The utility displays the Windows identity and uses the connection configured for the working profile. A new computer or different task account may need its own connection setup.

| Setting or control | Administrator action |
|---|---|
| SQL SETTINGS | Open the connection panel only when establishing or correcting the database connection. |
| SERVER NAME / DATABASE NAME | Enter the approved SQL Server and intended JobBOSS database supplied by the setup contact. Verify the environment before processing. |
| USERNAME / PASSWORD | Use the approved SQL connection credentials. Keep passwords in the organization’s normal credential-management process. |
| ACCEPT | Apply the connection values. If an error is shown, correct the values or connectivity issue and try again. |
| APP SETTINGS | Appearance settings. This is not the installed machine-hour configuration selector or the scheduling screen. |
| REFRESH DATA | Reload the available queue and historical data. Reopen the application if the displayed list remains stale. |

## Retain a concise installation record

- Installed calculation: Labor-hour balancing or Labor-and-machine-hour balancing; include the executable location and responsible contact.
- Database, effective date, lookback window, candidate exclusions and treatment of earlier manual adjustments.
- For automation: task name, Windows account, ALL argument, trigger, expected verification time and person monitoring the result.

Connection, scope and package changes belong with the setup contact. Confirm representative results after a change before returning to the normal processing routine.

TROUBLESHOOTING

# Resolve an unclear run before retrying

Preserve the evidence and check the actual JobBOSS result.

| Symptom | Useful next check |
|---|---|
| No jobs appear | Refresh or reopen; confirm database, closed overlapping entries and effective date/window. Check exclusions and prior processing history. |
| Processing reports an error | Retain the message, job IDs and run time. Inspect history and affected JobBOSS values before any retry; some updates may already have completed. |
| A job disappears from the queue | Verify status, history and the job’s live values. Removal from the displayed batch is not a success test. |
| History and ACT LABOR differ | Compare the same basis: history includes labor and burdens; ACT LABOR in the queue is base labor only. |
| Scheduled work is not visible | Review task execution and account/connection, then closed entries, eligibility and date window. No eligible jobs means no new event. |
| Machine hours differ from expectations | Check the installed configuration and distinguish operation setup/run totals from transaction-level machine-hour fields. |
| The refreshed list still looks wrong | Reopen the utility, compare the underlying job data and resolve the discrepancy before processing the stale selection. |

## Information to keep for follow-up

Record the affected job and operation, employee, original time range, process event, approximate run time, installed configuration and exact status/error message. Include what JobBOSS shows after the run and whether the task or an operator initiated it.

Historical Adjustments provides review records, not an Undo or Restore command. Have the setup contact determine the correction or retry after reviewing the affected data. Do not clear history simply to force another pass.

TRAINING EXERCISE

# Practice with an understood overlap

Use an approved training database or a deliberately scoped live example.

| Entry | Original timing | Expected allocated labor |
|---|---|---|
| A — same employee | 08:00–12:00 | 3.00 hours |
| B — same employee | 10:00–12:00 | 1.00 hour |

This exercise assumes two eligible completed entries, no other concurrent entries and no break deduction. A has two hours alone, then shares two hours with B. Use the rule on page 4 to explain the result before processing.

1. **Prepare the evidence**
   Confirm the employee, operations, timestamps, database and installed configuration. Record the original labor and operation values in your exercise notes. Ensure the entries have not already been utility-processed or manually corrected.

2. **Select the exercise work**
   Refresh the utility and check only the intended eligible job or jobs. If both entries are on one job, the allocation still considers two entries; the queue remains job-level.

3. **Process and inspect history**
   Run the selection, read the status, refresh and choose the process event. Locate the affected job, employee and operation details.

4. **Verify the result**
   Check the allocated labor and related JobBOSS results. Confirm original timestamps remain and operation machine-hour behavior matches the installed configuration. Compare history and JobBOSS totals on the same basis.

## The exercise is complete when the team can explain

- Why A receives 3.00 hours and B receives 1.00 hour, and why the allocation can change during an entry.
- Which action writes the change, where to review it and which evidence confirms the result.
- Why new eligible entries can return a job to the queue and what to check before a retry after an error.

REFERENCE

# Answers to common operating questions

Use these distinctions when explaining the routine to production and accounting.

## Can the employee work on more than two entries?

Yes. Each shared period is divided by the number of concurrent entries for that employee. Four entries active for the same full hour receive 0.25 hour each, before any applicable break treatment.

## Do all entries on a job have to be processed together?

The operator selects jobs, while the calculation works on eligible underlying entries. New eligible entries can bring the job back on another run. Wait until the relevant concurrent entries have closed before processing the current scope.

## Does the utility change employee pay rates or attendance?

Its purpose is job-labor allocation and related cost recalculation using recorded rates. Original start/stop timestamps remain. Treat attendance and payroll review as separate processes.

## Will every job’s before-and-after total decrease?

Do not use that as a pass/fail rule. The utility recalculates affected labor and burden values from the allocation and recorded rates. Review the specific entries and compare equivalent totals.

## Does the original demonstration determine my configuration?

The recording is useful for recognizing the screens and workflow. The installed package determines operation machine-hour behavior. Confirm that behavior with the setup contact and a representative result.

## Where do I change the schedule?

The recurring run is configured in Windows Task Scheduler by the setup contact. The application’s APP SETTINGS controls appearance; it is not an in-app scheduling calendar.

## What if a report or screen looks slightly different?

Use the recognizable task controls in this guide and confirm the installed build. Older guides and the public demonstration may differ in layout. Report installation and menu names can vary by site.

OPERATING CHECKLIST AND RESOURCES

# Keep the training resources together

Make the guide and recording easy for the next operator to find.

## Before and after each run

- **Before:** intended database and scope; relevant concurrent entries closed; deliberate job selection; no conflicting scheduled run.
- **After:** completion/error status reviewed; correct process event opened; representative JobBOSS results verified; exceptions assigned before another attempt.
- **For the schedule:** expected execution checked; eligible work and resulting data reviewed when work is expected; connection or environment changes followed up.

### Watch the public Weighted Labor Balancing demonstration

Approximately five minutes. The recording shows the selection workspace, Historical Adjustments and a separately installed assessment report. No registration was required when this guide was prepared.

| Demonstration view | Approximate point |
|---|---|
| Balance Labor Entries and job-selection workspace | 1:00 |
| Job selection checkboxes | 2:15 |
| Historical Adjustments and job/entry details | 2:55 |
| Assessment-report detail in JobBOSS | 4:10 |

**Product overview:** Neptune-Weighted-Labor-Balancing-Marketing.pdf explains the business use, calculation and installed configurations for production, accounting and management.

### Contact Neptune for setup or training assistance

Have the installed configuration, affected job/run details and the relevant question or status message ready.

Prepared from the utility source, original user and administrator material, historical training sessions and the public recorded demonstration. Screens shown are genuine demonstration captures. Revision 2026-11-05.