CETEC ERP

Work Order Screen

Before & After Training Guide

Audience: Shop floor workers

Before: Current production screen

After: New screen (next release)

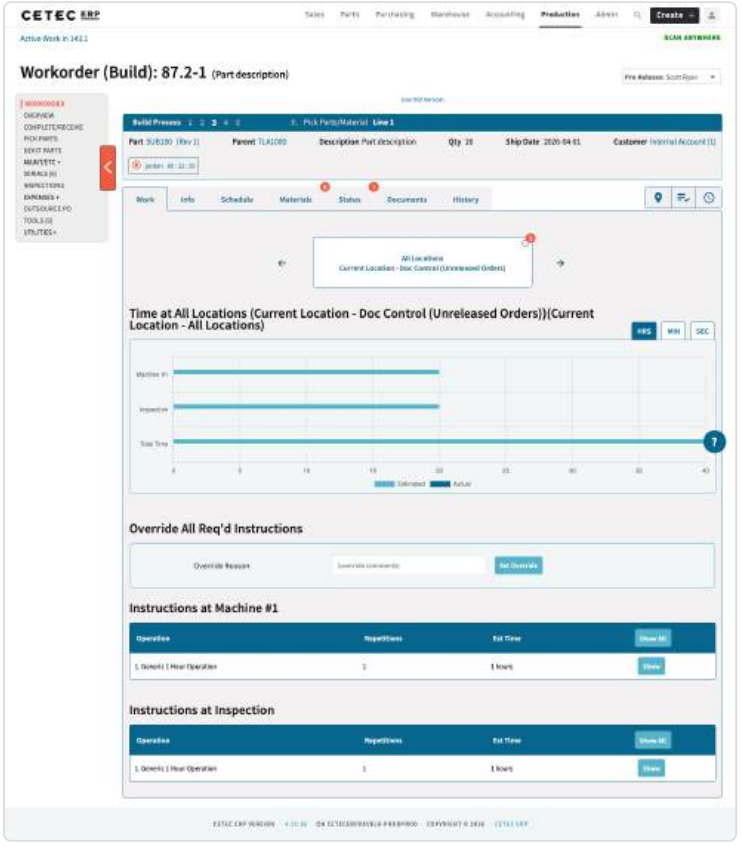
17 Training Cards

The Big Picture: What Changed

BEFORE

OLD SCREEN

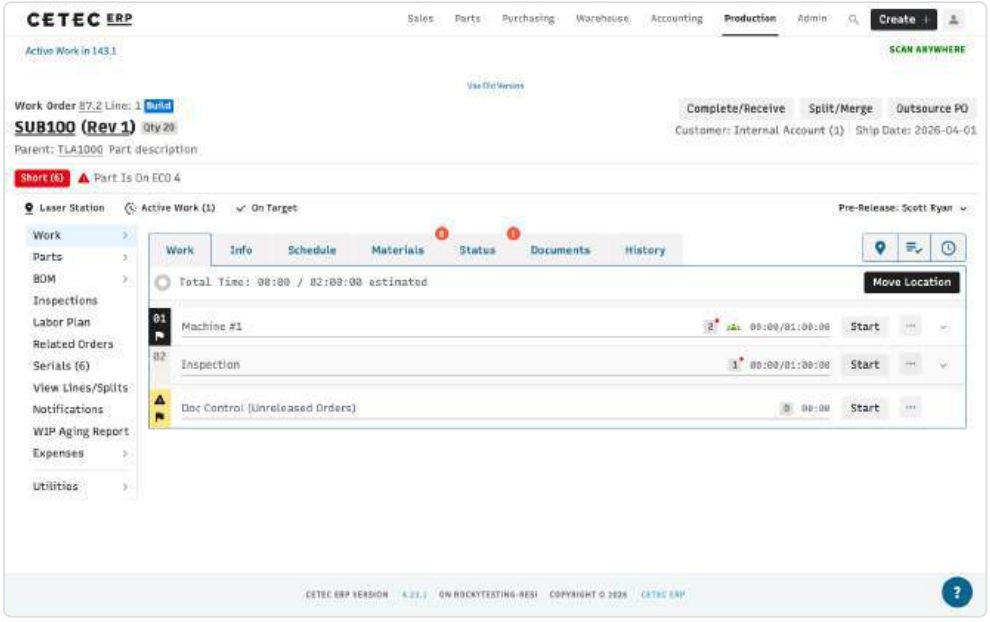
A narrow info bar at the top, a sidebar that required a toggle button to open, and a **left/right sliding carousel** to move between work locations.



AFTER (NEW)

NEW SCREEN

A bold header showing all order details at a glance, a sidebar that is **always open** on the left, and a **stacked list** of locations you scroll through and expand.



> **Key message:** Everything you could do before, you can still do — it is just in a new place. This card set will show you exactly where to find each thing.

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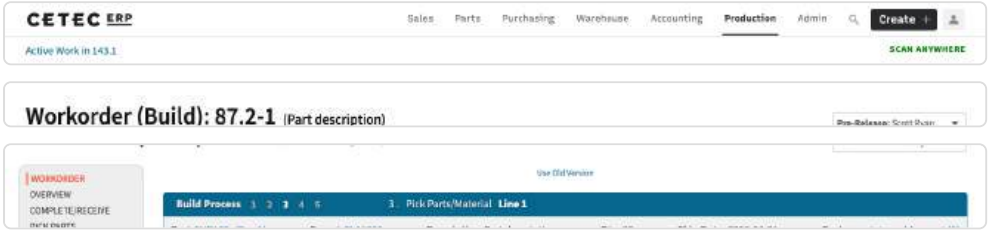
Finding Your Order Info

BEFORE

OLD HEADER

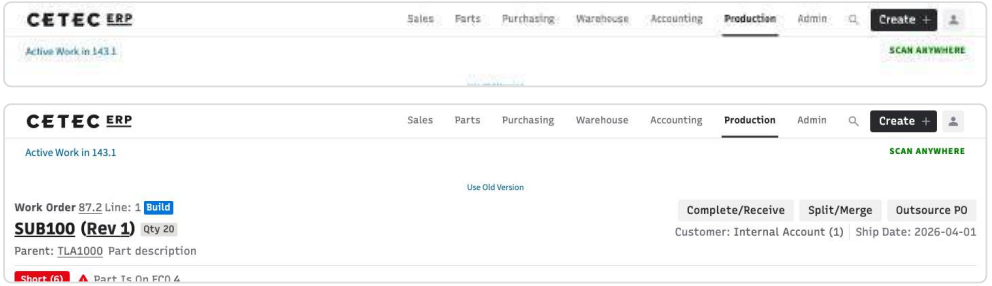
The top of the screen had a title row with the order number, a blue stepper bar showing location steps, and a compact info row below that.



AFTER (NEW)

NEW HEADER

A taller header with the order number and order type tag on top, then the **part number in large bold text**, revision, quantity, and description. Customer and ship date are on the right.



Key message: All the same info is still at the top of the page – it is just bigger and easier to read.

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Spotting Problems: Alerts and Warnings

Alert indicators used to be small text that was easy to miss. In the new screen, they are large, bright buttons in the header.

SHORT PARTS

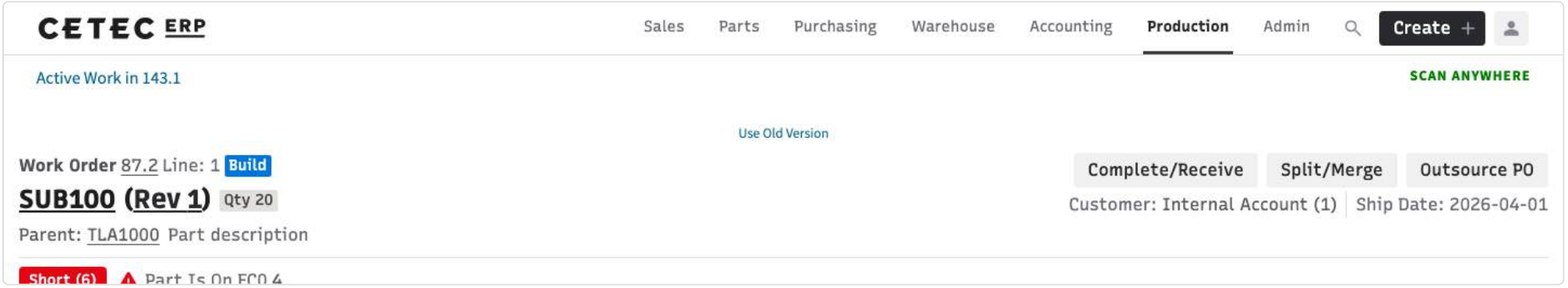
A **red "Short (N)" button** means parts are short. The number tells you how many. Check with your supervisor before continuing.

QUALITY ALERTS

A **red "Quality (N)" button** means there are quality alerts. Click it to see the details.

ECO / HOLD

An **orange or yellow warning** appears if the part is on an Engineering Change Order or on hold.



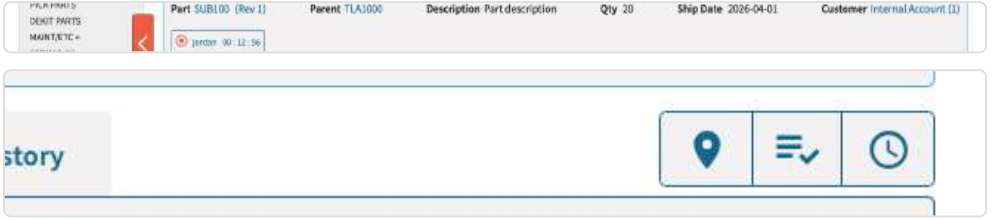
Key message: Red buttons in the header mean there is a problem.

The Action Row: Your Daily Buttons

BEFORE

OLD BUTTONS

The Move, Pick Parts, and Start Work buttons were inside the main work area above the carousel. The workflow status dropdown was up in the title row.



AFTER (NEW)

NEW HEADER ACTION ROW

The header now has a dedicated **action row** with:

- **[Location] button** – click to move order to a new location
- **Active Work (N)** – how many people are working this order right now
- **On Target ✓ / ✗** – quick indicator if this order is on track
- **Workflow dropdown** – same as before

The Move / Pick Parts / Start Work 3-button cluster is still in the Work area:

Key message: The Move Location button and Workflow dropdown are now in the header. The 3-button cluster is still in the Work tab too.

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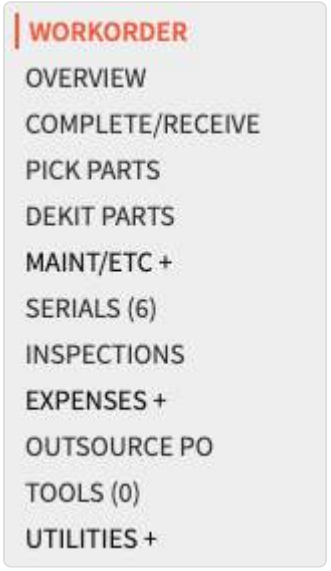
The Sidebar: Always There Now

BEFORE

OLD SIDEBAR — HIDDEN BY DEFAULT

The sidebar was hidden. You had to click a **toggle button** (small arrow icon on the left edge) to slide it open. It showed a flat list of links.



AFTER (NEW)

NEW SIDEBAR — ALWAYS VISIBLE

The sidebar is **always visible** on the left side — no toggle button needed. It is organized into expandable groups:

- **Work** → View All Work, Order Info
- **Parts** → Pick Parts, Dekit, Kit Audit, Order Material
- **BOM** → BOM Management, Change Rev, Build w/ Subs
- **Serials, Notifications, Expenses, Utilities**

> **Key message:** Hover over a group name to see its sub-links. No toggle button needed — the sidebar is always there.

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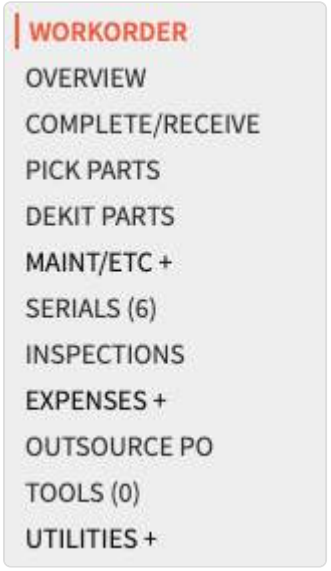
Sidebar Links: What Moved or Changed

BEFORE

OLD MAINT/ETC SECTION

The sidebar had a **MAINT/ETC** section with links like Work Instructions, Clear Work Instructions, and others grouped at the bottom.



AFTER (NEW)

NEW SIDEBAR ORGANIZATION

The "MAINT/ETC" group is gone. Here is where things went:

- **Work Instructions** → now inside each location row in the Work tab (expand the row)
- **Documents / Notes** → Sidebar → Utilities (count shown, e.g. "Documents (3)")
- **Tools** → still in sidebar, shows count (e.g. "Tools (2)")
- **WIP Aging Report** → still in sidebar, updated link

> **Key message:** If you used to click a sidebar link and can't find it, check inside the Work tab location rows – instructions moved there.

The Work Tab: From Carousel to List

BEFORE

OLD WORK TAB — CAROUSEL

A **horizontal sliding carousel** of location cards. Click left/right arrows to move between locations. The selected location was highlighted dark blue. Work instructions appeared in a table below the carousel.

AFTER (NEW)

NEW WORK TAB — STACKED LIST

A **vertical stacked list** of locations. At the top is a **Progress Panel** showing overall % complete. Each location is its own row. Scroll down to see all locations.

> **Key message:** Scroll down to see all your locations. No more left/right swiping — everything is stacked top to bottom.

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The Progress Panel

NEW IN THE WORK TAB

At the top of the Work tab there is now a **Progress Panel** showing:

- A **gray circular progress ring** in the top-left corner, right next to the words "Total Time" — the ring starts gray and fills in with color as actual time is logged against the estimate
- **Total Time: actual / estimated** — a live running counter of time worked vs. the time budgeted for this order
- A **"Move Location" button** — same as the button in the header; click either one

This panel did not exist in the old screen. There was no single "overall progress" indicator before.

> **Key message:** The big circle at the top of the Work tab tells you at a glance how far along the whole order is.

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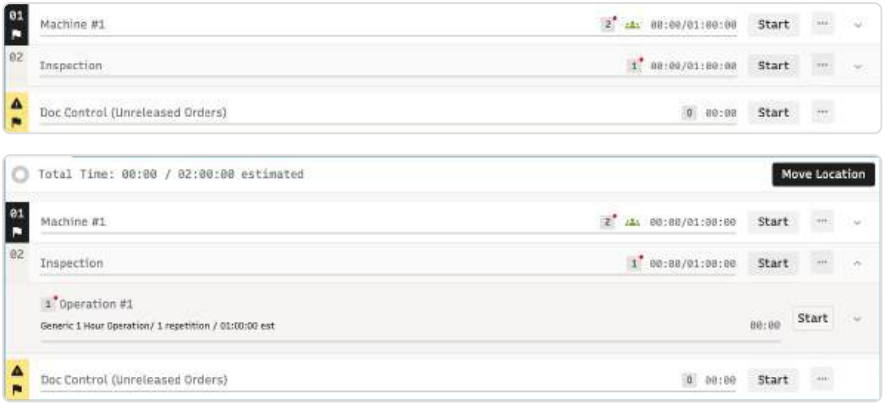
Reading a Location Row

NEW LAYOUT

Each location is its own row. When collapsed (closed), a location row shows all of this at once:

1. **Position number** (e.g., 10, 20, 30)
2. **Flag icon** if this is the current active location
3. **Location name** (e.g., "Laser Station")
4. **Operations count** with alert badge if any have issues
5. **Active users** currently working here
6. **Elapsed / estimated time** – live counter
7. **Progress bar** showing how much of this location is done
8. **Start / Stop / Stop All** button for time tracking
9. ⋮ **dots menu** for more actions
10. **Chevron ›** to expand and see instructions

> **Key message:** You can see all locations at once. Each row tells you everything without having to click in.



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Opening a Location to See Instructions

BEFORE

Clicking a carousel card showed work instructions in a table *below* the carousel. You could only see one location's instructions at a time.

AFTER

Click the **chevron ›** on the right side of any location row to expand it. Inside you will see:

- The **work instructions** for that location
- Each operation shows its name and required/optional status
- Time logged vs. estimated per operation
- A **timer button** per operation to start/stop tracking time on that specific step

> **Key message:** Click the › arrow on the right of any location row to see its instructions and start timing a specific step.

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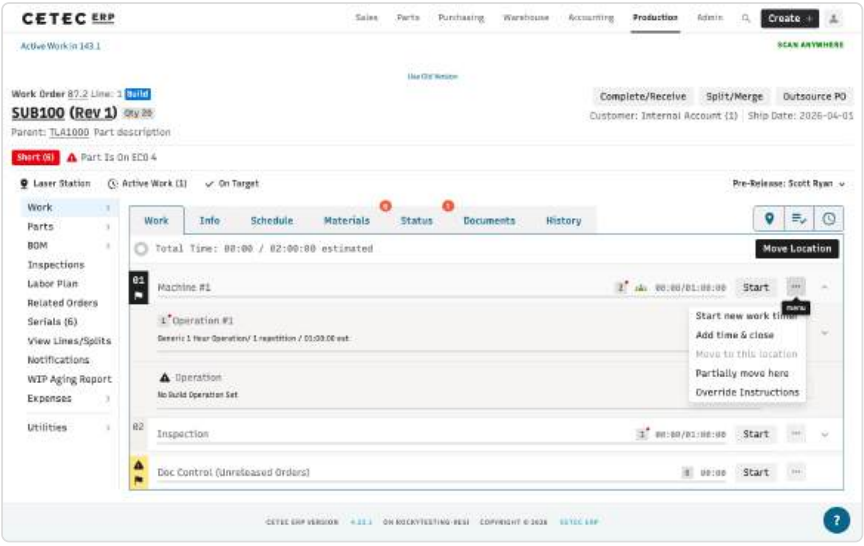
Quick Actions: The Dots Menu (⋮)

NEW PER-LOCATION MENU

Each location row has a ⋮ **(three dots) menu** button. Click it to see these options:

- **Start new work timer** – begin timing work at this location
- **Add time & close** – manually add time and close out a session
- **Move to this location** – set as current location (grayed out if already current)
- **Partially move here** – split the order quantity between locations
- **Override Instructions** – available if your permissions allow it

> **Key message:** The ⋮ menu is where to go if you need to move the order to a specific location or add time manually.



Seeing Individual Operations

BEFORE

Work instructions appeared in a flat table below the carousel with columns for Operation, Instructions, Estimated Time, Actual Time, and completion checkboxes.

AFTER

After expanding a location, each **operation** appears as its own sub-row. Look for operations marked *"Outside Labor Plan"* — these are additional steps not originally planned.

> **Key message:** Use the timer button next to the specific step you are working on — not just the location-level timer.

The Tab Bar

BEFORE

OLD TAB BAR

Same tabs as before: Work · Info · Schedule · Materials · Status · Documents · History. The Schedule tab only appears for orders with transcode SA.

Only the **Work** tab has changed. All others are identical.

AFTER (NEW)

NEW TAB BAR

The tabs look slightly different but work the same way. The tab order is unchanged.

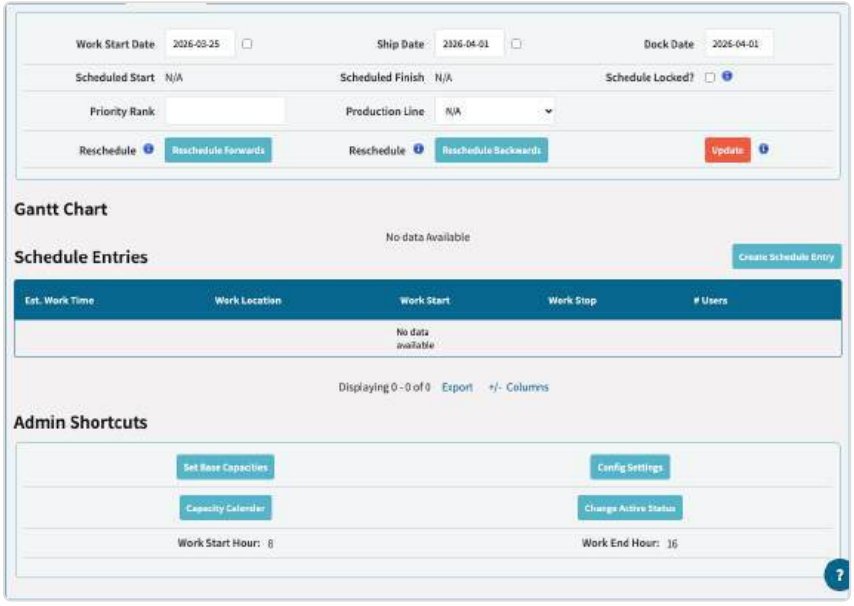
> **Key message:** Only the Work tab looks different. Info, Materials, Status, Documents, and History are exactly the same as before.

Schedule Tab: New Clear Schedule Button

BEFORE

OLD SCHEDULE TAB

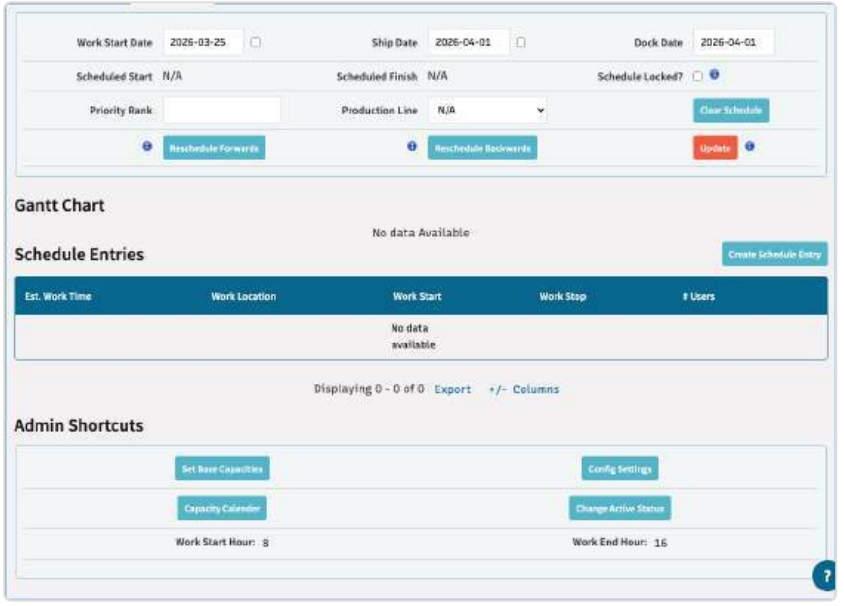
The Schedule tab showed scheduling information. There was no "Clear Schedule" button.



AFTER (NEW)

NEW SCHEDULE TAB

The Schedule tab now has a **"Clear Schedule" button**. Clicking it will ask you to confirm before it erases all scheduled dates from this work order. This cannot be undone without re-scheduling the order.



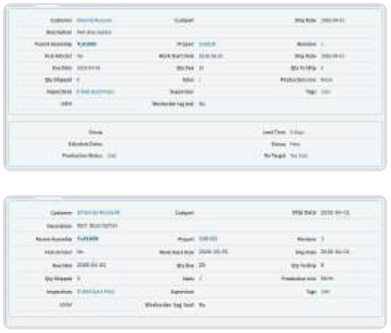
Key message: The Clear Schedule button is new. It will ask you to confirm before making any changes.

Info, Materials, Status, Documents, and History Tabs

CETEC ERP

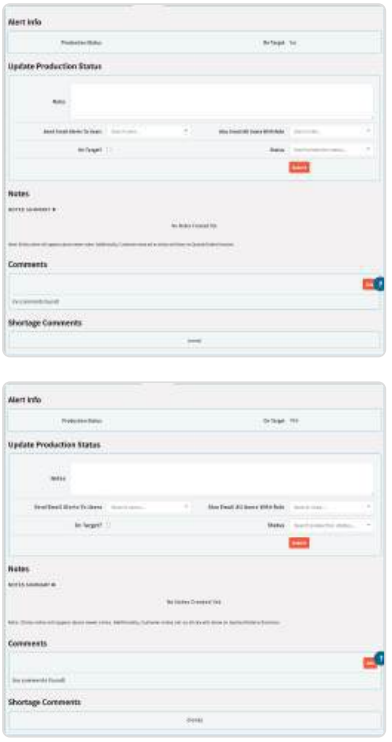
✅ **These five tabs are identical between the old and new screens. Nothing changed.**

INFO TAB



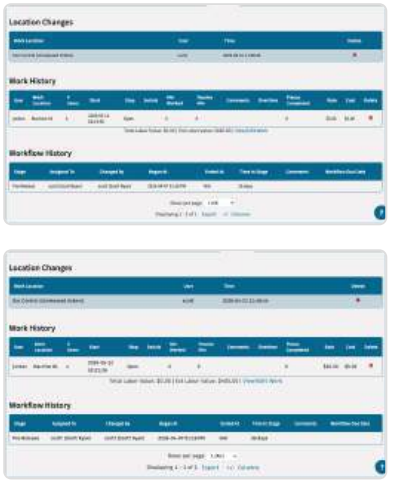
MATERIALS TAB

STATUS TAB



DOCUMENTS TAB

HISTORY TAB



Key message: If someone asks whether the Info, Materials, Status, Documents, or History tab changed — the answer is no. Same as before.

Stuck? Use the 'Use Old Version' Link

At the very top of every new work order screen, in small text, is a link:

"Use Old Version"

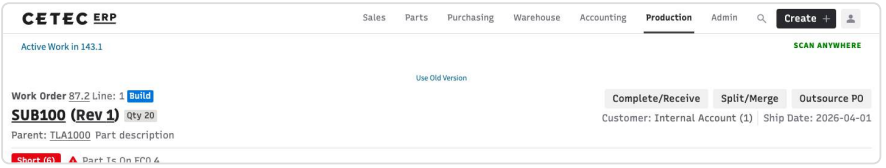
Clicking this takes you back to the previous version of the work order screen. The old version is **not going away** – it is still available as a backup.

If you have to use the old version, **tell your supervisor** so they can help you find the same feature in the new screen for next time.

> **Key message:** The 'Use Old Version' link is always at the top of the page. Use it if you get stuck, and let your supervisor know.

The link appears at the very top of the screen, above the header:

Here is where it sits in the full page view:



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Quick Reference: Where Did It Go?

WHAT YOU'RE LOOKING FOR	WHERE IT WAS (BEFORE)	WHERE IT IS NOW (AFTER)
Order number, part, qty	Top info bar	Top of the new header (large text)
Ship date & customer	Top info bar	Right side of the new header
Short parts / quality alert	Small text in info bar	**Red buttons** in the header — hard to miss
Workflow dropdown	Top title row	Header action row (bottom of header)
Move order to new location	"Move" button above carousel	Header action row + ⋮ dots menu per location
Start work timer	"Start Work" button above carousel	Still in work area + ⋮ dots menu per location
Pick Parts	"Pick Parts" button above carousel	Still in work area; also Sidebar → Parts → Pick Parts
Work instructions for a location	Table below the carousel	Expand the location row (click ›)
Overall order progress	Not available	Progress Panel at top of Work tab
Documents	Sidebar → Documents	Sidebar → Utilities → Documents (count shown)
Work Instructions link in sidebar	Sidebar → MAINT/ETC	Inside each location row in Work tab
Open the sidebar	Click the toggle button on the left edge	Already open — always visible on the left
Go back to old screen	N/A (you were on it)	"Use Old Version" link at very top of page