

Ostendo

And

Freeway

Recording

Of

Quantities / Statistics
(Internal Employees)

(Update 233)

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Recording Quantities / Statistics For Internal Employees:

Overview:

Quantities can have a multitude of uses. For example:

- You may simply want to record quantities of product completed. These could be recorded as they are produced (Continuous Qty), or recorded at the end of the process (Completed Qty). The Qty's could also influence an on-charge
- You may need to record a series of temperatures the during a visit or a QA process, in order to determine Minimums / Maximums / Sums or Averages or simply the Last Qty recorded
- Quantities statistics can be recorded on their own or in conjunction with the time they were recorded
- These Quantities can be set to update quantity values against the following:
 - Company Asset (Can also update the Primary Reading against the Asset)
 - Customer or Supplier
 - Site
 - Item

A new Related option under the respective master screen is now available to view summarised results along with the breakdown of recorded Quantities.

- The Quantity records are linked to specific Descriptors which are defined in such a way to trap the required statistical data.
- In addition to Statistics entered for Descriptors that are predefined on a job, you are also able to record Statistics against other descriptors which are defined in an Inventory List. These Qty Descriptors are made available to the Freeway user at the same time as pre-defined job Quantities Descriptors. These additional descriptor Qty Statistics are updated when the Datasheet is completed based on the Descriptor Mobility 'Log Qty's Against' option eg: Customer / Supplier / Asset etc..

Example:

The example below relates to Completed Quantities which will be recorded by an employee to update a Job in Ostendo based on those qtys. This example relates to simple Lock Installs on a job. The employee merely needs to record the number of locks they have installed on the job. They will progressively record a qty after each lock or door is completed. This example is based on a \$140 per Install Cost from the Descriptor, being on charged to our job customer at \$250 per install. We will also link the Quantities to the Job Customer so we can determine historically, how many locks have been installed for this customer across all jobs. The end result of this is the job will updated with the number of Lock Installs from employee Datasheets. This example assumes the buy price (Cost) is a flat \$140 per install charge covering all labour and materials.

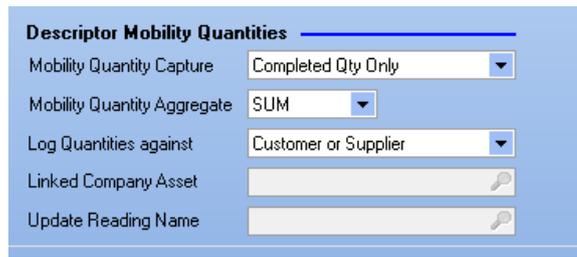
- Setup a Descriptor with a Buy Price

The screenshot displays the 'Descriptors' software interface. The main window is titled 'Descriptors' and has a menu bar with options: Descriptor Costing, Descriptor Markups, Categories, Analysis Groups, KitSet Cost Inquiry, and Customise. Below the menu bar, there are tabs for 'List' and 'Detail', with 'Detail' selected. The interface is divided into several sections:

- Descriptor Code:** Includes fields for 'LOCK INSTALL' (Descriptor Code), 'EA' (Unit), 'Lock Installation' (Description), and 'Active' (Status).
- Settings:** A sub-section with tabs for 'Settings', 'Rental', 'Freight', 'On Charge', 'Budget', and 'Times'. It contains fields for Category, Sub Category, Pricing Group, Tax Group (set to 'TAXABLE'), Analysis Group, Expense Cost Centre, and Income Cost Centre.
- Descriptor Sales Settings:** Includes checkboxes for 'Sales Warranty Applies', 'Exclude from Web Sales', and 'Segmented POS Barcodes', along with a 'Mobility Image' field.
- Descriptor Information:** Includes 'Primary Supplier', 'Lead Time' (0), 'Sourced By' (Purchasing), 'Duty %', 'Unit Weight', 'Unit Volume', 'Unit Area', and 'Introduction Date' (27/02/2018).
- Descriptor Pricing & Costing:** A table showing pricing details:

Sell Price	SP (inc Tax)	Buy Price	Pricing	Costing
\$250.00	\$287.50	\$140.00		
- Descriptor Classification:** Includes radio buttons for 'The Descriptor is for general purpose non-stock use', 'FreeForm: Receipts create new Job or Assembly lines', and 'The Descriptor is used as a Kitset Code'.
- Descriptor Mobility Quantities:** Includes dropdowns for 'Mobility Quantity Capture' (Completed Qty Only), 'Mobility Quantity Aggregate' (SUM), and 'Log Quantities against' (Customer or Supplier).

- Define a Descriptor Mobility Quantities Settings:



Mobility Quantity Capture (This defines what information the Freeway user needs to complete):

- | | |
|--------------------------------------|---|
| ○ N/A | Not Used as a Qty |
| ○ Completed Qty Only | Prompts for Date & Qty |
| ○ Completed Qty with Time | Prompts for Date with Entry Time |
| ○ Continuous Qty Only | Prompts for Date and Qty |
| ○ Continuous Qty with Time | Prompts for Date and Entry Time |
| ○ Start Stop Time Only | Prompts for Date & Start & Stop Times |
| ○ Start Stop Time with Completed Qty | Prompts for Date & Start & Stop Times & Qty |

NB: References to Time does NOT relate to timesheet entry. This is completely independent of labour posting

Mobility Quantity Aggregate (This defines how the data is to be interpreted):

- | | |
|-------------|--|
| ○ SUM | The total of all results entered |
| ○ MIN | The Minimum Qty of any result entered |
| ○ MAX | The Maximum Qty of any result entered |
| ○ LAST | The Last Qty result entered |
| ○ HOURLYAVG | Hourly Avg Qty (Time & Qty Capture Only) |
| ○ ENTRYAVG | Entry Avg Qty (Qty or Time Capture) |

Log Quantities against: (This defines where these statistics are logged within Ostendo)

- N/A
- Company Asset
- Customer / Supplier
- Site
- Item (Parent Item – Only applicable for Assembly Orders)

- Setup a job and enter a Descriptor job line on the job with a Planned Qty of Locks to be installed.

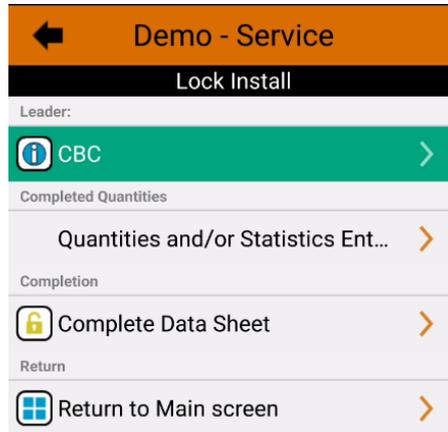
Job Line	Line Source	Line Properties	Actual Issues	Warranty	Dimensions	Order History	Additional Fields	
Line No	Line Type	Code	Order Qty	Actual Qty	Unit	Std Price	Order Price	Disc %
10	Descriptor Code	LOCK INSTALL	6	0	EA	\$250.00	\$250.00	0
Description			Nett Amount	Tax Amount	Total Amount			
Lock Installation			\$1,500.00	\$225.00	\$1,725.00			
Task Seq	Task	Tax Code	Analysis Group	Invoice & Quote Display	Line Status			

- Setup a Mobility Style Template to include 'Quantities' in the Template Type section

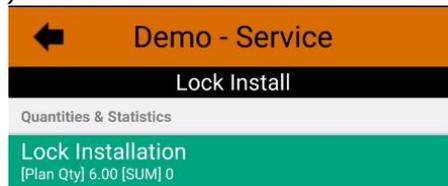
Style Templates						
Sequence	Type	Description	Option	Display Option	Include In Print	Override Group Cap
10	QUANTITIES	Quantities and/or Statistics Entered		Always	<input type="checkbox"/>	

Recording Quantities / Statistics In Freeway:

- Deploy the job to the Sub Contractor and create a new Datasheet.



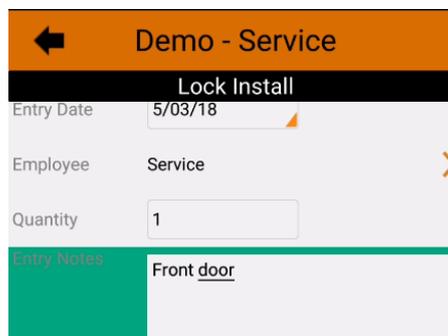
Select Quantities options. Notice the Plan Qty has been read from the Job Line Qty, and the SUM (in this case) is Zero as we have not entered results yet. Select this Descriptor I



- The next screen allows you to create a Quantity transaction. Press the '+' button to add a Qty. Think of this as a Register Entry.



- Change the Date if necessary and select the Employee (if you are recording a Team Members Qty). Enter a Qty and some notes if required.



- When finished, return to the previous screen by press the 'Back' arrow

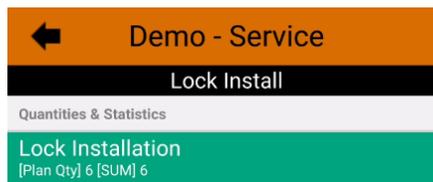
- This screen shows you the contents of the Qty record



- Pressing the Back arrow again will show you a summary screen of that descriptor, displaying Qty's recorded so far



- Repeat this process to add further Quantities as that are completed. As each entry is recorded, the Summary screen updates based on totals recorded so far.



- Complete the Datasheet
- In this example, when the Datasheet is returned to Ostendo, three things will occur.
 - The Job Line will be updated with an actual issue reflect the sum of Locks Recorded using the Descriptor Buy Price as the Cost

Job Line	Line Source	Line Properties	Actual Issues	Warranty	Dimensions	Order History	
Line No: 10							
Date	Qty	Unit Cost	Charge Style	Non-Charge Code	Issue Source	Issue No	Issue Description
5/03/2018	6	\$140.00	Chargeable		Issues	SV2012458	SV2012458

- The Customer Quantities records will be updated against the Customer for this Descriptor.

Statistics Tab

Customer Quantities

Customer	Statistics Code	Statistics Description	Recorded Style	Last Recorded Date	Statistical Aggregate	Statistical Value
▶ CBC	LOCK INSTALL	Lock Installation	Completed Qty Only	5/03/2018	SUM	6

Quantities Tab (providing breakdown)

Customer Quantities

Sheet ID	Entry Date	Start Time	End Time	Entered Value	Entry Notes
▶ SV2012458	5/03/2018	1:02 PM		1	
SV2012458	5/03/2018	1:02 PM		3	
SV2012458	5/03/2018	12:59 PM		1	Front door
SV2012458	5/03/2018	1:01 PM		1	

Additional Statistics Available To All Jobs

In addition to Statistics entered for Descriptors already defined on a job, you are also able to record Statistics against other descriptors maybe against a Site Level.

In our example we have a Descriptor 'LOCK INSTALL' defined on the Job to enable recording of Completed Qty's at a Customer Level. However as a completely separate statistic we may also want to record the total time to install locks and log that against the site record.

In order to do achieve this we must create a separate descriptor and define it to log Qty's against a 'Site' record, in this case, as shown below.

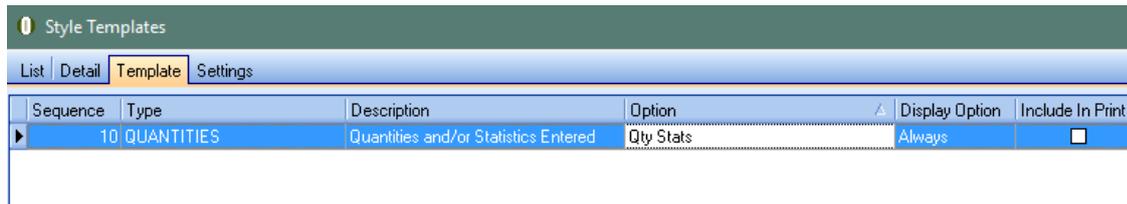
The screenshot shows the 'Descriptors' configuration window. The 'Descriptor Code' is 'SITE LOCK INSTALLS' with unit 'EA'. The description is 'Site Lock Install Total Duration'. The status is 'Active'. The 'Descriptor Information' section includes 'Lead Time' (0), 'Sourced By' (Purchasing), and 'Duty %'. The 'Descriptor Pricing & Costing' section shows 'Sell Price', 'SP (inc Tax)', and 'Buy Price' all set to '\$0.00'. The 'Descriptor Classification' section has three radio buttons: 'The Descriptor is for general purpose non-stock use' (selected), 'FreeForm: Receipts create new Job or Assembly lines', and 'The Descriptor is used as a Kitset Code'. The 'Descriptor Mobility Quantities' section has 'Mobility Quantity Capture' set to 'Start Stop Time Only', 'Mobility Quantity Aggregate' set to 'SUM', and 'Log Quantities against' set to 'Site'.

NB: This descriptor does Not need to be defined on a Job, rather it must be defined in an Inventory List. (In this case a List called 'Qty Stats'). Multiple Descriptors may be defined in this list

The screenshot shows the 'Lists' configuration window. The 'List Code' is 'Qty Stats'. The table below shows the following data:

Line Number	Code Type	Code	Description	Unit
10	Descriptor Code	SITE LOCK INSTALLS	Site Lock Install Total Duration	EA

To make this list entry available to the Datasheet, modify the Style Template Quantities to include this list entry



Sequence	Type	Description	Option	Display Option	Include In Print
▶ 10	QUANTITIES	Quantities and/or Statistics Entered	Qty Stats	Always	<input type="checkbox"/>

Now when the Freeway user selects the Quantities option from the Template they will be presented with two descriptors to record results against. The Descriptor on the job will update the Actual Issues and the Customer Quantities, whilst the Descriptor on the list will simply update the Times record against the Site.

This completes the Documentation For Quantity & Statistics For Internal Employees