

Implementing Software

by Matt Gacek

Today I had the opportunity to sit in on a Client Services implementation meeting. Going into the meeting, I wasn't sure what I was going to write about. Leaving the meeting, I knew I would write about B&L's methodology for installing software.

When I first started at B&L (10+ years ago), an implementation consisted of a list of files that needed to be created plus a training list. This information was handed over to the new customer. Frequently, the implementation would last a year or more. Times certainly have changed. In this article, I will briefly describe the phased implementation approach we now take when installing software.

Customer

Today's implementation meeting was for a recently signed, 250 employee foundry. The foundry is currently using an old DOS based system. Their old system has limited support and is very difficult to pull information from. The foundry wanted to move into the 21st Century, thus they purchased Odyssey®.

The meeting revolved around a relatively complex implementation that is on a short timeframe. Six B&L consultants and analysts attended the meeting. Each consultant/analyst was assigned responsibility for part of the implementation. One consultant has overall responsibility for the implementation. The goal of the meeting was to ensure everyone is on the same page and that the timeline was laid out in an effective manner. The implementation was broken down into five phases.

Phase One — File Conversion

File Conversion is the 1st phase in the process. The data from the old system must be moved over into Odyssey. Years ago, this task was accomplished by hand-keying all the data, which used to take several months. Now, moving the data into Odyssey takes several



B&L Implementation Team - Frank Roorda, Brenda Povlock, Jay Wigner, Kris Craft, and Donna Medlin. Not pictured: Mike Fabis

weeks. Odyssey's import/export wizard has eliminated the need for all the keying. The information from the old system will be downloaded into an Excel or a .csv file. From there we will map the old information into Odyssey. The most time-consuming activity for the customer will be ensuring that the information is accurate.

Phase Two — Business Review

In this stage, our consultants and analysts will review each module the customer is planning to implement. Our goal is to ensure we understand how the customer currently functions and how we can improve their operation with the Odyssey software package. It is easier to train when we understand our customer's wants and needs. Each person in the meeting will have a module or modules for which they will be responsible.

Phase Three — Training

Training is where we bring together both the File Conversion phase and the Business Review phase. Training is done one of two ways:

Internet Training — This is the most cost effective method, thus most popular.

On-site Training — This is an excellent source of training, providing you can keep the attendees focused on training and not their jobs!

We highly recommend that our customers utilize Internet training. It is cost effective, and we can focus on the exact training they need.

Phase Four — User Testing

We strongly recommend our customers use a testing phase. This is not a "run parallel for one month," but rather, users will bring their work and enter it into Odyssey (the test version with all of the customer's data). This will help flush out any surprises before going live. The B&L consultant provides any help or training as needed.

Phase Five — Go Live

This phase is when the client goes live with the software. Typically, we will send a consultant on-site to assist with any questions or issues that may arise.

This phased system has worked very well. In 2006, the Client Services department implemented 16 accounts. Some of the accounts required as little as 5 weeks to implement. Reasons for such fast implementation are: ease in converting files, internet training, metalcasting specific software, and our commitment to getting you live on the software as quickly as possible.

*Editor's note:
Matt is Manager of Sales and Marketing
for B&L*



Frankly Speaking



by Frank Roorda
Business Consultant, B&L

So You Say You Want to Schedule....

I run into clients who tell me they want to schedule using B&L's Odyssey or BLIS-400 package, but they have one big problem. They have no idea what their performance rates are for a majority of their operations, nor do they have the time to find out. Does this sound familiar? If it does, then read on; if not, then I understand that the "Dear Brenda" column might have an answer to some other unresolved problem you have.

What is scheduling?

Some tell me that it is an art; others tell me it's a science. As nearly as I can figure out, it is closer to walking a tight rope over Niagara Falls, with water to the right, and rocks to the left. Scheduling in B&L involves managing the balance between load and capacity. The capacity part is fairly easy. In the beginning of your respective implementation you created operations. Those operations represent the individual machines or work activities all throughout your plant. On each of those operations you created capacity. Capacity is simply defined as the amount of time that the operation is available for that day. We encourage clients to take uptime into consideration when they are creating their capacity by operations. This is often called "Practical Capacity." For example, a machine might be available 8 hours per shift, but when you net out the downtime, or employee breaks, how available is that machine? After the capacity is created for each machine, then a shop calendar is created. The calendar represents the days available for working within the plant. Netting out the holidays, weekends, or planned shutdowns, what remains is the available working days. A routine is then run to allocate available capacity by operation to the shop calendar.

The other side of the equation is called the load. Load is created when shop orders are entered into the system. This works by multiplying the performance rate of a given operation by the number of pieces scheduled at that operation. The result is how long it will take to perform each operation in the shop order. When all operations are taken

cumulatively, we then arrive at either a shop order starting date or end date, depending on whether we used the forward or reverse scheduling technique.

Why this falls down for some clients?

As I mentioned in the opening paragraph, it is not always possible to get performance rates for every operation, and in some cases all the client really knows is lead time through the plant. Does that mean you can't still use the B&L scheduling to arrive at a beginning or ending date for the shop orders though? The answer to this question is of course "no."

Queue methods

Even if you have no rates for operations or even limited rates, let's say just molding/casting rates and nothing else, you can still utilize scheduling using something that we call Overlap Method. In figure 1 below, you will see the scheduling tab from within the Odyssey Labor Routing detail screen.

For those operations where it is not possible to assign a real performance rate, consider using Sequence Overlapping. Sequence Overlapping, or Queue Method as it is known in BLIS-400, allows you to assign a number of days or hours in between operations. Also in this example (Figure 1), the system will assign a 10 day lead time between the computed end of the operation that came before it and the start of operation 300100. This technique could be used wherever real rates are not known by operation, but a general idea of how long it takes to move through the plant for each step is known. This is especially useful for outside operations. Just as I had described earlier, the system will accumulate all of the queue times to figure out shop order beginning or end dates.

To summarize, for those who do know your performance rates by operation, that's great, you are able to do detailed management of load and capacity by operations and use our scheduling module the way we intended. For those who only know some, or none of that information, perhaps queue times are the way

to go for now. As always, I hope this has given you useful information, and if you have any questions about how to implement this solution, please do not hesitate to contact us.

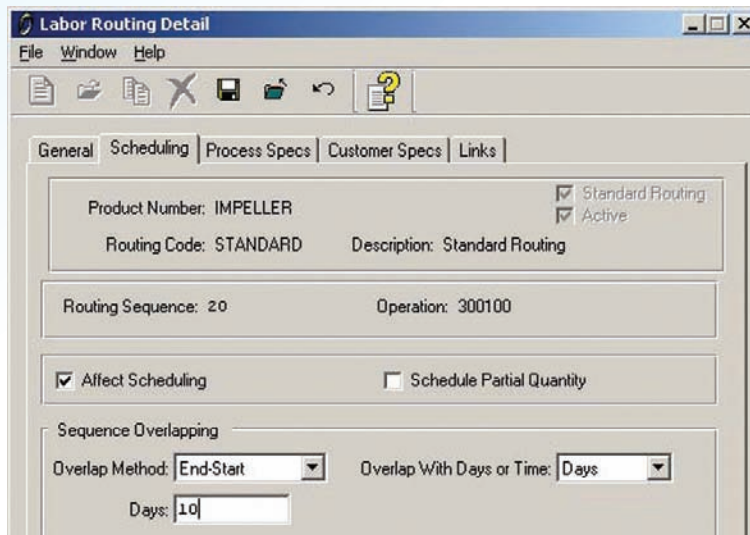


Figure 1

Welcome New Clients

<p>Lethbridge Iron Works Lethbridge, Alberta, Canada <i>Foundry - Odyssey</i></p> <p>Magnesium Aluminum Corp. Cleveland, OH <i>Die Caster - Odyssey</i></p> <p>Richmond Industries, Inc. Dayton, NY <i>Foundry - Odyssey</i></p> <p>MetalTek Intl., Southern Centrifugal Chattanooga, TN <i>Foundry - Odyssey</i></p>	<p>Empire Die Casting Co., Inc. Macedonia, OH <i>Die Caster - Odyssey</i></p> <p>Southwest Steel Casting Co. Longview, TX <i>Foundry - Odyssey</i></p> <p>International Truck & Engine Corp. Waukesha, WI <i>Foundry - Odyssey</i></p> <p>Acme Foundry, Inc. Coffeyville, KS <i>Foundry - Odyssey</i></p>
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Dear Brenda

Brenda Povlock, Manager-Client Services, B&L

Odyssey

Dear Brenda,

I have a laser printer that has multiple trays and it works great. The problem I have is that I need to print invoices to tray 1 because I keep labels in tray 2. Currently I have to change the settings each time I print invoices and it's becoming a nuisance. Is there any way to save the settings so invoices will automatically print to the correct tray?

A Real Pain

Dear Pain,

Crystal allows you to set a default printer but not its specific properties like tray to use. However, that doesn't mean we can't remove your pain; here's what you can do. Have your Network Administrator define another printer (same physical printer) and set its properties for printing to tray 1. Create a report series to tell the system which printer to use, even if there is only one report run in the series. For example, to print invoices (sh7100.rpt), create a report series calling it the same name (sh7100.rpt) and set the printer it should print to (i.e., new one defined for printing to tray 1). When you print invoices, the system will find a report series called sh7100.rpt and will print it to the proper printer and tray.

Dear Brenda,

Currently we hand write all packing slips and bills of lading for all our tool orders entered into the system. We also hand write all bills of lading for customer orders. When is B&L going to add an entry screen so we can have these printed by the computer?

Dear Writers Cramp

I want to alleviate the pain you're having right now. What you're asking for is already in the system so let me explain how to get what you need. When customer packing slips are entered into the system, a bill of lading is automatically created. Many times though, the individual may not enter packing codes. It is these codes that cause the container and weights to be printed on the bill of lading. Packaging codes must be set up for all the different types of containers you use. Don't worry about setting these up all at once, it may be possible for you (depending on your security) to have access to set up these codes as you need them, and then you can bring these codes into the packing slip. Creating a packing slip and bill of lading for Tool Orders can also be done in the Customer Packing Slip screen. Press F9 to add; when the add screen comes up (screen shot 1), enter your batch number, then go down to the bottom and check the box that this is a tool order. The entry screen will come up (screen shot 2); fill in as you would a customer packing slip and print as you normally would. If you have any questions, please call our support group at extension 829 or e-mail us at support@blinfo.com.

Writers Cramp



Doug Hinman
Manager - R&D, B&L

R&D DEVELOPMENTS

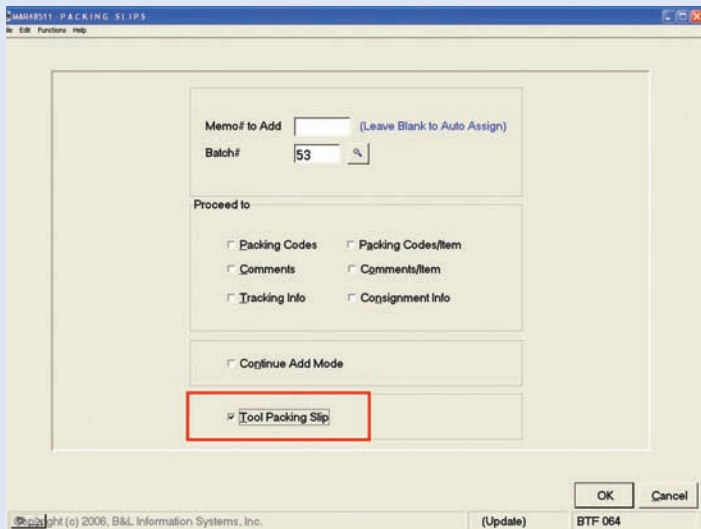
Last October, at Spectrum, we announced several new and exciting (not to mention challenging) changes in the

works. Release 3.4 of Odyssey® will be available by the time you read this. Along with a complete Container Inventory module, 3.4 includes two other very significant enhancements: the Cost Estimating wizard and the Screen Designer. The Estimating wizard adds a new level of power and ease of use to the Odyssey Cost module. The power comes from the ability to define your own formulas and the ease-of-use comes from the wizard style, along with allowing you to design your own screens.

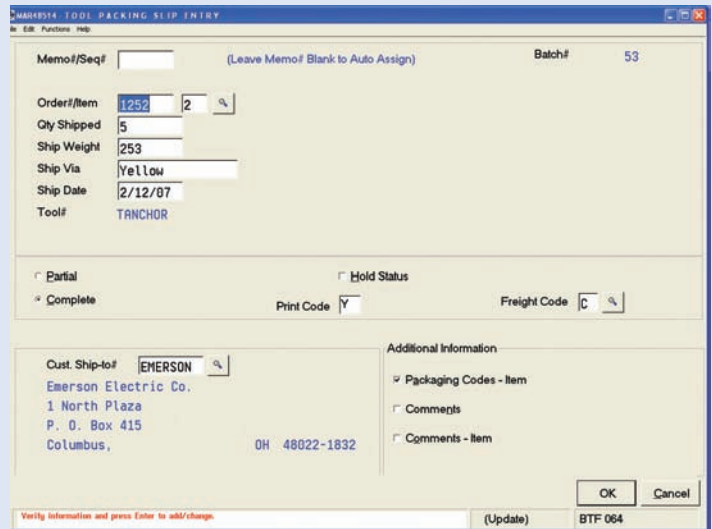
The Screen Designer was developed out of the need to deploy Odyssey transaction screens to small data collection devices, as well as to provide user-defined screens for the Estimating Wizard. This became a huge technical challenge, so we decided to make it even worse (meaning better for you). Not only will transaction and estimating screens be designable, but so will over one hundred other Odyssey screens. Now you will be able to customize screens to better suit your company's needs. You will be able to move fields around (including user-defined fields), remove fields, set default values, and more. The Designer also comes with its own security layer so you can use it and deploy it to your users to any degree you need.

The Wizard and Designer are very advanced topics. Consequently, training and consulting sessions (Webinars, etc.) are in the works to help you understand their capabilities and uses. Undoubtedly there will be sessions at Spectrum 2007 in Atlanta for these new features. In addition, input sessions with clients will help

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Screen Shot 1



Screen Shot 2

PRST STD
U.S. POSTAGE
PAID
Permit No. 10
Union Pier, MI 49129

TRAINING SESSIONS

Crystal Reports Class (Odyssey only) April 10 & 11
If you are interested in training, please contact **Brenda Povlock at ext. 321.**

B&L Friends & Family

Taylor Burkhardt, daughter of Tom and Karen Burkhardt and 7th grade student at Trinity Lutheran School in Berrien Springs, Michigan, was recently honored at a breakfast at Andrews University, where she and fellow student Trevor Strzyskowski, 8th grader at Trinity, were presented with Youth Appreciation Certificates by the Berrien Springs Optimist Club. The certificate recognizes students who have made valuable contributions to their community through such things as academics and community service. Taylor and Trevor were nominated for this award by their teachers. Taylor does tutoring for other students, is on the honor roll, and is at the top of her class, as well as being on the volleyball and soccer teams at her school. Congratulations Taylor and Trevor, and thank you for being such fine examples for others! Taylor's dad, Tom, is a software development engineer at B&L.



Taylor and Trevor with Mr. Eric Heins, Principal at Trinity Lutheran School

Olivia Grace West, daughter of Dawn and Shannon West, recently won first prize in the Cutest Baby contest sponsored by the News-Dispatch, a Michigan City, Indiana newspaper. The contest was for babies born in 2006 (Olivia was born July 28). There were over 150 other adorable contestants, but we all agree that Olivia is the cutest. As first prize winner, Olivia received a \$500 US savings bond. Olivia's mom, Dawn, is a software development engineer at B&L Information Systems.



UPCOMING EVENTS

Plastics Encounter, Cincinnati, OH	May 8-10	Booth #326
111th Metalcasting Congress, Houston, TX	May 15-18	Booth #517
WEBINARS		
Tools to Eliminate Common Foundry Scheduling Mistakes	Foundry	Apr. 24
Tools to Eliminate Common Foundry Scheduling Mistakes	Die Cast	Apr. 25
It's All About Information Visibility	Foundry	May 22
It's All About Information Visibility	Die Cast	May 23
Are You Shipping Your Profits Out the Door?	Foundry	June 19
Are You Shipping Your Profits Out the Door?	Die Cast	June 20
For a schedule of free webinars of Odyssey software, go to www.blinfo.com and click on Upcoming Webinars.		

<Continued from page 3 — **R&D**

us adjust the fine points of the Cost Estimating Wizard due to the many varied ways estimators do their job. Also mentioned at Spectrum 2006 was the future of BLIS development. This centers around four points:

- 1) Continued enhancements driven by the Web Request system
- 2) New i5 for B&L - A new 520 is being installed at OS400 version V5R3M5. This means library save compatibility back to V5R1. However, we plan to keep our old AS400 model 400, with is compatible way back to V3R2, for a yet-to-be-determined time frame. We have also looked at methods to support clients on old AS400s even after unplugging our model 400. During this transition time we will contact clients who need to decide

a future direction and help them determine their best option.

- 3) New GUI for BLIS -The new i5 will allow us to research several alternatives to the Seagull-based BLIS-GUI product. Your input is important in the final product decision so look for demos and input sessions during our research phase.
- 4) Deploying advanced Odyssey modules with BLIS. I described in the January edition of B&L NEWS how the Cost Estimating Wizard would work with BLIS. The new i5 also factors into this concept, in that it includes an Integrated xServer (IXS). An IXS is a built-in Windows server. It gives us (and you) the ability to run BLIS and Odyssey modules on the same piece of hardware, which means easier management through server consolidation.

