

2020

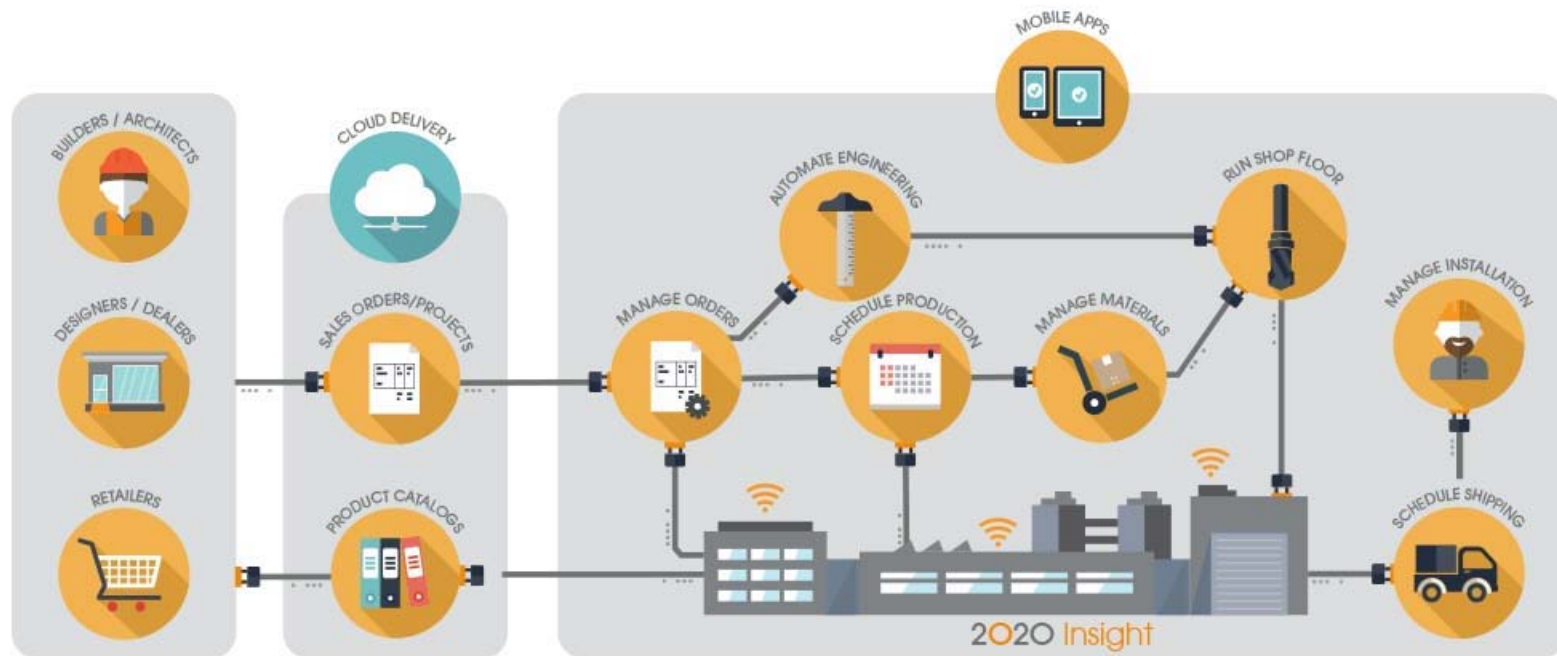
Making Spaces for Life™

2020

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# 2020 Insight v11 Highlights

# The **connected** factory.



2020

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# User Interface Enhancements

# User Interface | Forms and Options Ribbon

The screenshot displays the 'Projects - 2020 Insight' application window. The interface is divided into several sections:

- Top Ribbon:** Contains tabs for 'Forms', 'Options', and 'Projects'. The 'Forms' tab is active, showing various icons for document management and user interface customization.
- Left Panel:** A sidebar with a 'Projects' section containing a list of project entries: 'Mattamy Homes', 'Centex Homes', 'Alfred Williams', and 'BS Costs'. Below this is a 'Find' section with a search bar and buttons for 'Find', 'Clear', and 'Advanced...'. At the bottom is a 'Printer' button.
- Main Form Area:** The central workspace is divided into two main sections. The top section is a form for entering project details, including fields for 'Project', 'Description', 'Customer', 'Status', 'Manager', and 'Contract'. The bottom section is a table with columns for 'Project', 'Description', 'Manager', and 'Contact'. The table contains data for 'Centex Homes' and 'Alfred Williams'. The 'Centex Homes' row is highlighted.
- Right Panel:** A sidebar with a 'Project' section containing a list of project entries: 'Centex Homes', 'Centex Highland Links', 'Alfred Williams', and 'BS Costs'. Below this is a 'Find' section with a search bar and buttons for 'Find', 'Clear', and 'Advanced...'. At the bottom is a 'Printer' button.

The 'Forms' ribbon includes the following groups and items:

- File:** Printer, Refresh Settings.
- Look and Feel:** Skins, Icons, Theme, Show Navigator, Style.
- Trace:** FormulaTrace, Database Trace.
- Language:** Language.
- Window:** Close, Cascade, Tile Horizontally, Tile Vertically, Minimize All, Next Window.
- Help:** Contents, Online User Forum, About.
- Current View:** Form Layout, Current Form Strings, User Flag Categories.

The 'Options' ribbon includes the following groups and items:

- Forms:** Sales, Scheduling, Purchasing, Inventory, Machining, Shop Floor Assistant, Service Management, Business Intelligence, Inquiry, Workflow, Catalog Setup, Engineering Setup, Process Setup, System Setup, System Administration.

The 'Projects' ribbon includes the following groups and items:

- Project:** Project, Description, Customer, Status, Manager, Contract.
- Table:** Project, Description, Manager, Contact.

# Service Management Module

# Overview

- The service management module is intended to support the management of product installations and other activities (warranty calls, etc.) at the customers' site including scheduling of resources – professionals & equipment
  - Job site management
  - Installation project management
  - Shared calendars

# Service Management | Orders and Jobs

Service Orders - 2020 Insight

Forms Options Service Orders

Standard

Service Order:

Description:

Status:

Order Type:

From Install Date:

To Install Date:

Find Clear Advanced...

Service Orders

Drag a column header here to group by that column

inoOrderNo	inoDescription	inoInstallDate	inoCon
51	BS	1/28/2008	

Service Order

Additional Addresses Attachments Notes Sales Order 1782

Customer: BS Blue Sky, Inc.

Service Order: 51

Description: BS

Order Type: Standard

Installation Date: 1/28/2008

Completion Date:

Created On/By: 5/30/2018 8:58:47 AM US01\koslje

Status: 1000 New

Service Address: SE

Southeast Dealer Office

483 Bragg Blvd  
Suite 3  
Fayetteville, NC 83920  
US  
919-483-4578

Service Jobs

Drag a column header here to group by that column

jobID	Status Value	Status Description	jobSequence	jobPriority
Electrical	1000	New		
Installation	1000	New		

Skills Characteristics Attachments Notes

Available

Drag a column header here to group by that column

Skill	Description
DL	Driver's License
CDL	Commercial Driver's License
Plumber	Licensed Plumber
Truck	Personal Truck

Selected

Drag a column header here to group by that column

Skill	Description
Electrician	Licensed Electrician

field="inoDescription"

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# Service Management | Scheduling

Service Order Scheduling - 2020 Insight

Forms Options Service Order Scheduling

Standard

Service Order:

Description:

Status:

Order Type:

From Install Date:

To Install Date:

Find Clear

Service Order Scheduler

Drag a column header here to group by that column

inoOrderNo	inoDescription	inoInstallDate
5	Install Basekit	02.05.2018
6	Apartment House	30.04.2018
7	Small Enhancement	02.05.2018
9	AM Installation	04.05.2018
10	AM	13.04.2018
60	BS Test	28.05.2018
61	AM	05.05.2018
62	AM	05.05.2018
63	AM	05.05.2018

Jobs Service Order Service Order Address

Drag a column header here to group by that column

iojJobID	iojtpDescription	WorldLoadProportion	iojPriority	Status Description	iojNumberC
1	Kitchen Installation	23 / 0	2	Proposed	
2	Electricity Supply	1,5 / 0	2	Scheduled	
3	Plumbing	3 / 0	3	Scheduled	

Resources

Drag a column header here to group by that column

* Organization	Organization Name	Status
CPro	Thomas Jones	
os-ts2\installer1	Installer 1 for ISM - Electrician	
os-ts2\installer2	Installer 2 for ISM - Plumber	
os-ts2\installer3	Installer 3 for ISM - Electrician	
os-ts2\installer4	Installer 4 for ISM - Laborer	
JohnP	John Power	
SusanE	Susan the Electrician	
GeorgeP	George the Plumber	

Drag a column header here to group by that column

* Code	Effective	Inactive
Electrician	01.01.2012	01.01.2014
Truck	01.01.2012	06.06.2075

MONTAG 30 DIENSTAG 1 MITTWOCH 2 DONNERSTAG 3 FREITAG 4

08 09 10 11 12 13 14 15 16 17 18 19 20

6 - Kitchen Installation Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE JohnP, RayP, CircularSaw2

6 - Kitchen Installation Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE JohnP, RayP, CircularSaw2

5 - Kitchen Installation Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE JohnP, RayP, CircularSaw1

6 - Kitchen Installation Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE RayP, JoeP, CircularSaw2

7 - Kitchen Installation Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE JohnP

6 - Plumbing Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE GeorgeP

5 - Electricity Supply Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE SusanE

6 - Electricity Supply Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE SusanE

7 - Plumbing Franz Lenz Str. 1, 49074 Osnabrück, Nds, DE

OK Cancel Apply

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# 2020 Insight Mobility

# Today

- Maximizing inventory throughput, increasing productivity and improving accuracy are key goals for **manufacturing** operations. Through the deployment of **industrial mobility solutions, manufacturing** organizations can dramatically reduce unplanned downtime and enhance worker productivity.
- Customers expect **unprecedented responsiveness** and information— and not only for the sales team. **Field service** technicians are providing valuable touch points for your brand, but without the right information on a mobile device, they provide a lag in responding to customer requests.

# 2020 Insight Mobility Overview

- **Field Sales**

- Customer contact data / GPS map location
- Order/Sales history and/or status
- View by Sales Representatives



- **Field Service**

- View/upload orders, documents, photos, drawings
- Initiate replacement part orders and/or RMA's
- Confirm delivery
- Calendar scheduling tool

- **Business Intelligence**

- Create dashboards and/or KPI charts and view on your mobile device for real-time intelligence

# 2020 Insight Mobility



Home  
Screen



Business Intelligence

— Business Intelligence



Sales

— Field Sales



Services

— Field Service

# Optimization & Block Nester

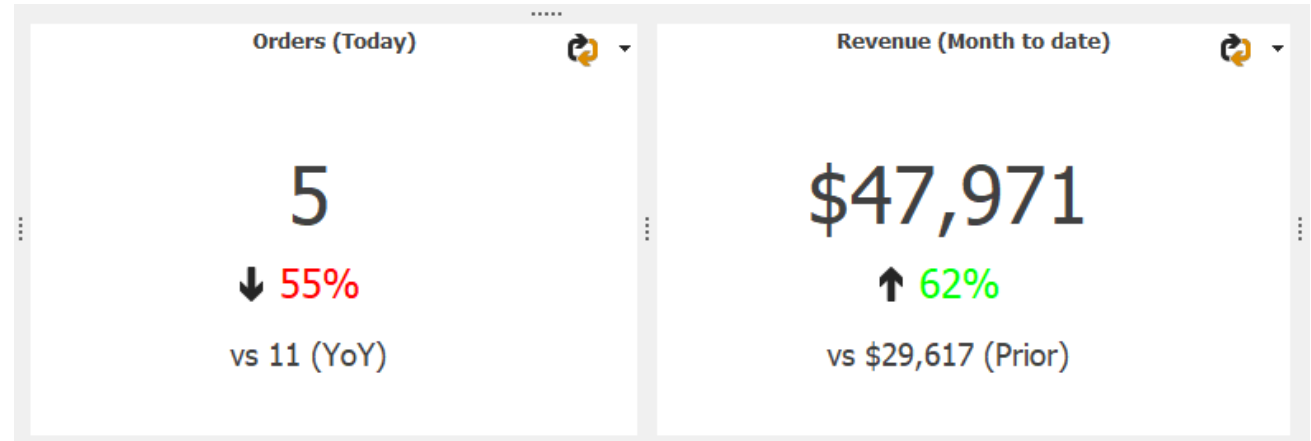
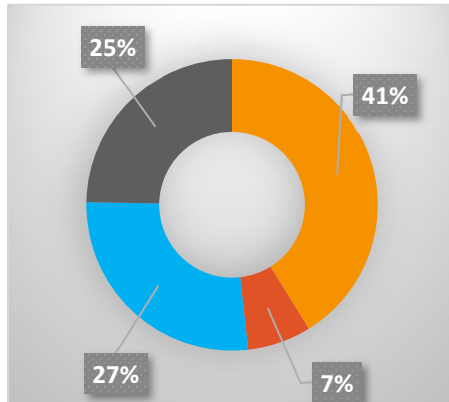
# Panel Saw Optimization

- Integrated solution for panel saw optimization
- True Headcut
  - A true headcut pattern allows increased pattern complexity by separating the raw material into two smaller panels on the first cut
- Remnant management incorporated into 2020 Insight data – taking partially consumed material and putting back in inventory for future use

# Business Intelligence Enhancements



# Business Intelligence Enhancements



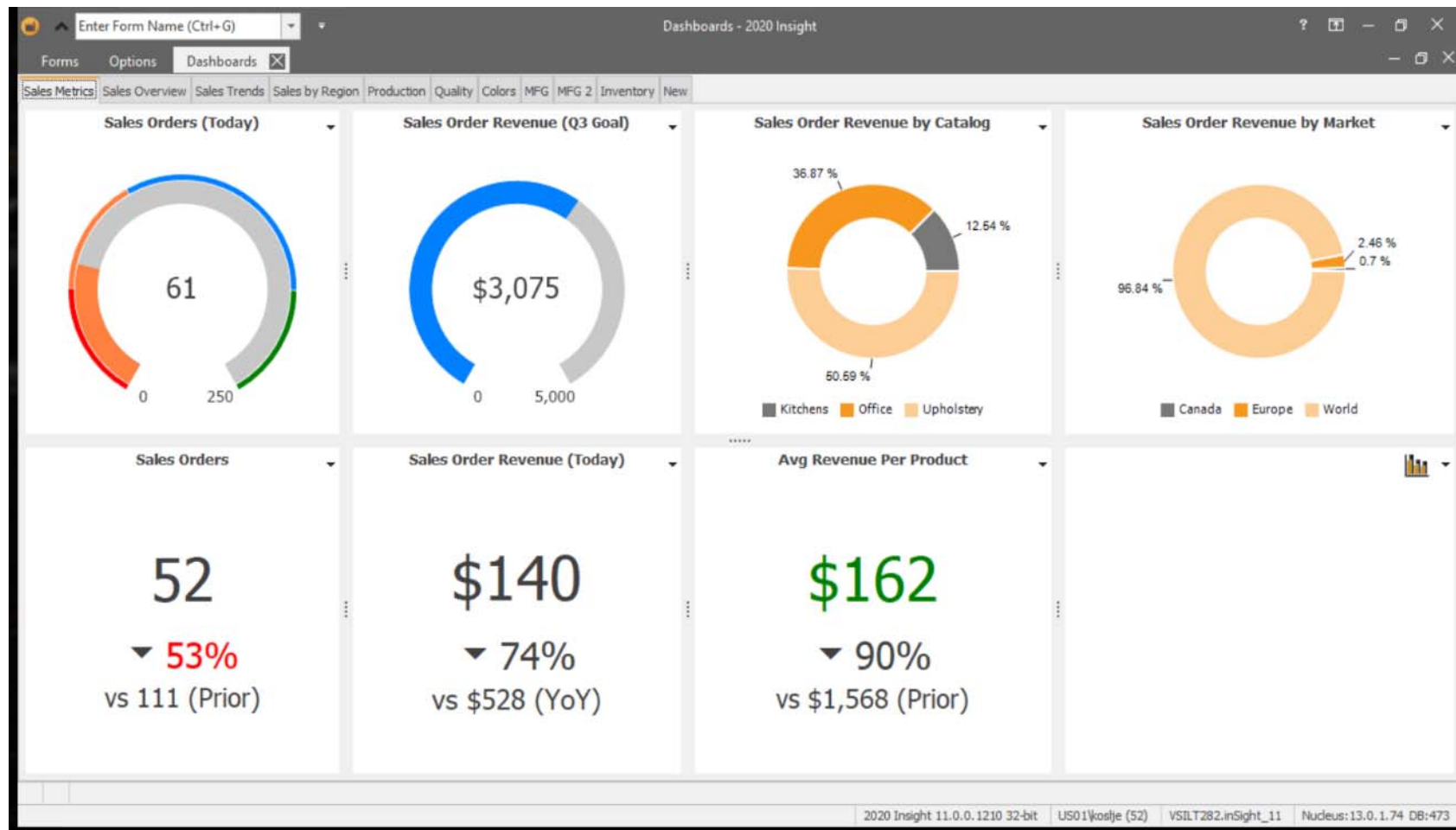
## Standard intelligence examples included:

- Revenue by quarter vs. target
- Sales over time (Q/Q)
- Sales by employee
- Orders over time (Q/Q last fiscal)
- Sales by territory

## New dashboard components

- Pivot Grids
- Gauges
- KPI/Metric data
- Additional chart types

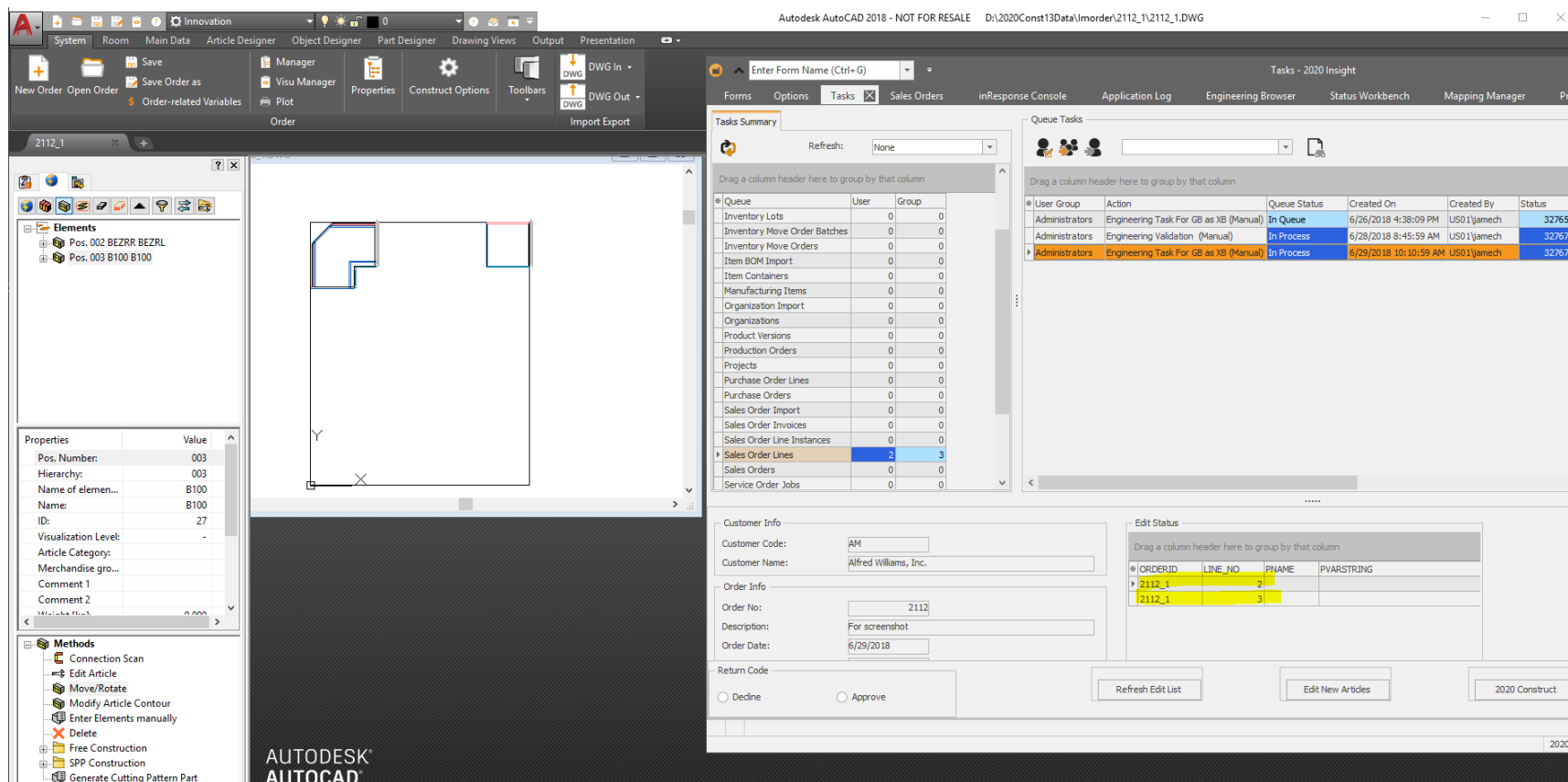
# BI Metrics Dashboard Example



# XB Special Processing

# Additional Functionality

- Updated system action tree templates to allow for architectural submittal drawings to go through the product review, edit and acceptance.



# In addition

# Additional Functionality

- Ability to drag & drop attachments, into the 2020 Insight attachment tabs, from external sources
- New system action that allows, when you re-roll (value) standard cost, to apply to existing inventory
- Allow items to switch from Buy to Make and Procurement method based on criteria-based conditions
- Support changing product configuration for order lines that are in production



# Information

- Version 11 will be GA mid August 2018
- Version 11 requires SQL 2017