

INFIMACS II® Data Sheet

Integrated Financial and Manufacturing Control System

Activity Tracking

FUNCTIONS

- Assign accountability for recurring or *ad hoc* activities
- Assure security and skill level of assignees
- Record accurate costs at the task level
- Schedule tasks according to resource availability

FEATURES

- Manage tasks with any Internet connection
- Zero client-side maintenance
- Program, table, and field level security
- Screen labels user-maintainable
- Tasks may be sequenced serially or concurrently
- Templates allow easy creation of recurring activity

SUMMARY

The Activity Tracking module is a complete browser-based system for assigning, scheduling, tracking, and costing activities as a series of predefined tasks. AT is the core module of a new generation of web-enabled applications designed to complement the standard INFIMACS II ERP system.

The competitive advantage of many businesses depends upon implementing and executing unique business policies and procedures. The modern generation of advanced ERP systems, such as INFIMACS II, have enabled more effective control of standard business processes. Yet, as good as these systems have been, they had to leave many business-specific procedures aside in the interest of standardization.

Managers control security by defining an organizational structure that may or may not parallel that in INFIMACS II. Managers can also define certain required skills types and grades. Once security and skill levels have been defined managers can assign users to appropriate organizations and skill levels. These will be used to determine the eligibility of individual users to view information and accept specific task assignments.

A task is simply the smallest unit of work that management deems worthy of tracking and managing. Managers create tasks with organizational and skill level requirements to be matched by those of candidate users.

Managers create templates to organize groups of tasks typically done in the same sequence.

These templates could be for customer call tracking, new product introduction, mergers and acquisitions, or any recurring activity vital to your business. A default user may be assigned to each task in a template at this time.

Supervisors (or in some cases the ERP system) create activity orders from the already defined templates. At that time, an activity order can be given a priority and the default user may be changed to reassign the tasks. AT contains a scheduling component that may be used to monitor and balance the task load on individual users.

Each user will monitor their task queue and advance the task status as it is completed. The user may or may not be required to book labor against the task. Once a task has been completed, the next task on the order will appear in the next user's task queue until the order is completed.

Throughout the process, managers, supervisors, and users can always tell "who has the ball" and at the end managers will know "how much the job cost".

Activity Templates

The screenshot shows the 'Activity Templates (AT1TVP) - Add Task' window. The main window has a toolbar with navigation icons and a search icon. Below the toolbar, there are several input fields: Organization ID (RELEVANT), Procedure ID (PG), Sub Class (NE), and User Org (ADM). A 'Task List' section is visible, with a filter set to 'Step' and 'Path'. The table below has columns: Step No, Path No, Task No, Task ID, Desc, User Org, and Org. A 'Done' button is at the bottom left, and 'New Task' and 'Copy Path' buttons are at the bottom center.

A template is a sequence of steps to be completed serially.

A step is a collection of paths that may be completed in parallel.

A path is a sequence of tasks to be completed serially.

A task is the smallest unit of work to be tracked.

Step No	Path No	Task No	Task ID	Desc	User Org	Org
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