

Employee Setup for Capacity



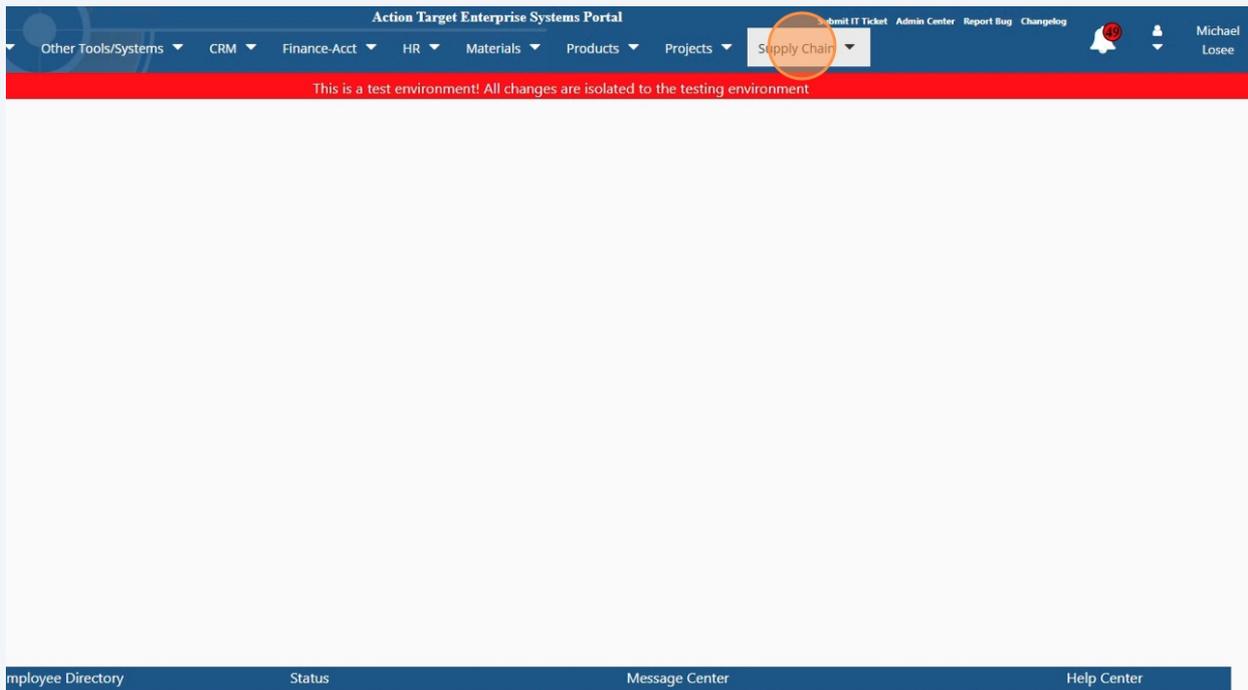
The following steps show how to add an employee to affect capacity.

1 Navigate to the Action Target Enterprise Portal

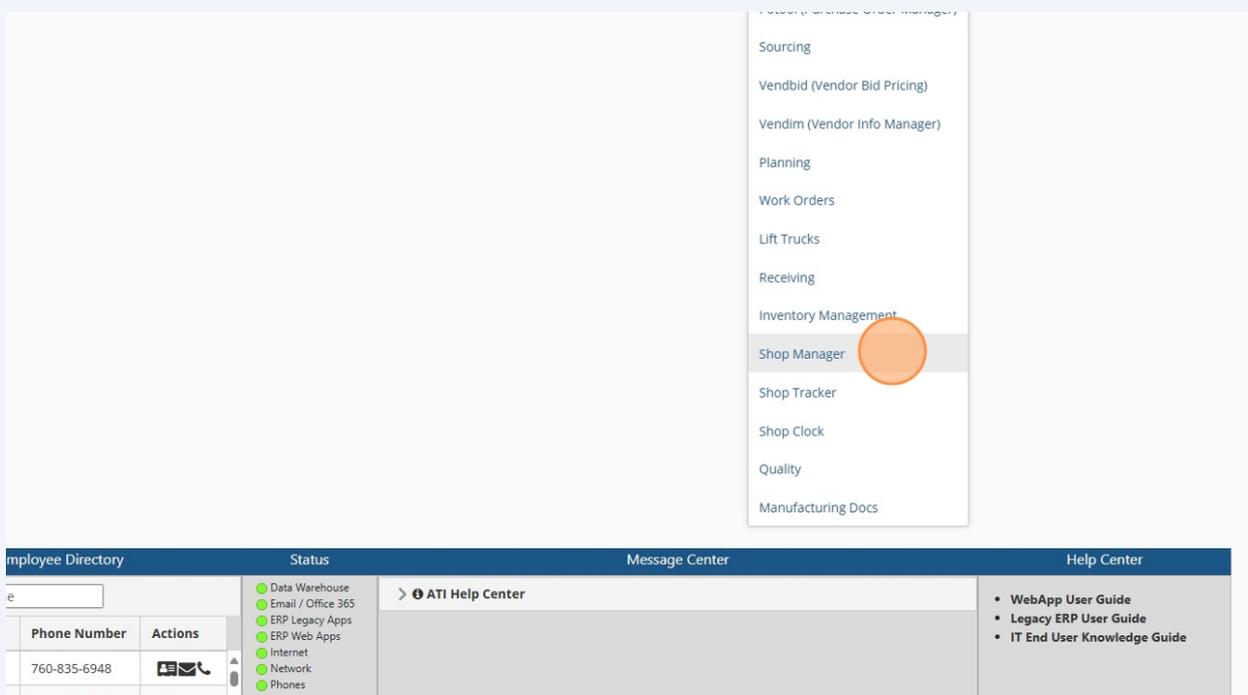
This is a test environment. All changes are isolated to the testing environment.

Employee Directory			Status	Message Center	Help Center
<input type="text" value="Employee Name"/>			<ul style="list-style-type: none">Data WarehouseEmail / Office 365ERP Legacy AppsERP Web AppsInternet	> ATI Help Center	<ul style="list-style-type: none">WebApp User GuideLegacy ERP User GuideIT End User Knowledge Guide
Employee Name	Phone Number	Actions			

2 Click the "Supply Chain" menu located at the top of the portal.



3 Click the "Shop Manager" tool from the dropdown menu.



4 Click on the "Capacity" tab at the top of the tool.

The screenshot shows the 'Action Target Enterprise Systems Portal' with a navigation bar containing 'Legacy ERP', 'Other Tools/Systems', 'CRM', 'Finance-Acct', 'HR', 'Materials', 'Products', 'Projects', and 'Supply Chain'. A red banner below the navigation bar reads 'This is a test environment! All changes are isolated to the testing environment'. The main header is 'Shop Manager'. Below it is a tabbed interface with 'Capacity' highlighted. Under the 'Capacity' tab, there are buttons for 'Show Master', 'Hide Schedule', 'Show Hours', 'Show Op Time', and 'Show Logs'. Below these buttons is a 'Shop Schedule' section with a table of work orders. The table has columns for Priority, WO ID, MTR, op_seq, Req Qnt, Part Number, Description, Operation, Next Op Name, WO Descr, Start, and St. The table contains 10 rows of data, with some rows highlighted in yellow and others in red.

Priority	WO ID	MTR	op_seq	Req Qnt	Part Number	Description	Operation	Next Op Name	WO Descr	Start	St
6	56758	mo-167046-1	1	15	15869	PT Hostage H	assembly-pa		PT Hostage Head Kit Boxed	2025-03-28	in-p
6	58695	mo-170270-3	1	16	33993	Autotargets, C	elec-assembly		AutoTargets Lift Unit Versio	2025-04-24	sta
6	58074	mo-169332-1	1	10	7621	-REDLINE- TCM	elec-assembly		-REDLINE- TCM bank	2025-04-29	in-p
6	58090	mo-169356-1	1	6	45168	DRM Pro Ratcl	elec-assembly		DRM Pro Ratcheting Carrier	2025-04-30	in-p
6	58048	mo-169290-1	1	2	46547	DRM-Pro Cont	elec-assembly		DRM-Pro Control Panel - Dc	2025-05-02	in-p
6	58403	mo-169861-5	1	6	37964	Genesis Retri	elec-assembly		(Phase-Out - Replaced By 5	2025-05-05	kitt
6	59786	mo-172202-4	1	16	21882	-Redline- Man	elec-assembly		Mancom Fixed Lateral Weat	2025-05-06	sta
6	59789	mo-172214-4	1	16	21882	-Redline- Man	elec-assembly		Mancom Fixed Lateral Weat	2025-05-06	sta
6	58209	mo-169595-3	1	25	26303	Genesis Retri	elec-assembly		Genesis Retriever Turning C	2025-05-06	in-p

5 Click the "Show Employee Setup" button in the Capacity Management header.

The screenshot shows the 'Action Target Enterprise Systems Portal' with the 'Capacity' tab selected. Below the 'Capacity' tab, there are buttons for 'Show Employee Setup', 'Show Exceptions', 'Show Time Off', 'Show Holidays', 'Show Resources', 'Show Graph Details', 'Graph', and 'Refresh Capacity'. Below these buttons is a 'Capacity Report' section with a table of summary data. The table has columns for 'Total Weekly:', 'Total Daily:', 'Last Refresh:', 'Scheduled: Planned:', 'BackLog: Pending:', and 'Quote:'. Below the table is a graph area with a y-axis ranging from 0.6 to 1.0.

Total Weekly:	Scheduled: Planned:	BackLog: Pending:	Quote:
Total Daily:			
Last Refresh:			

6 Scroll down to view the employee setup list.

7 Click the "Add" button in the Employee Setup List Header.

The screenshot displays the Action Target Enterprise Systems Portal interface. At the top, there is a navigation bar with the AT logo and various menu items: Legacy ERP, Other Tools/Systems, CRM, Finance-Acct, HR, Materials, Products, Projects, and Supply Chain. A red banner below the navigation bar states: "This is a test environment! All changes are isolated to the testing environment". Below the banner is a chart area with a y-axis ranging from 0 to 0.2. The main content area is titled "Employee Setup" and contains a table with columns: Employee ID, Casual Name, Pool ID, Title, Hours, Efficiency, and Default. The "Add" button in the table header is circled in orange. The table contains the following data:

Employee ID	Casual Name	Pool ID	Title	Hours	Efficiency	Default
1605	Craig Olsen	11	blast	8	80	true
1654	Jaime Manrique	4	Electronics	40	80	true
2322	Wilfred Atutiga	3	Bend 175T	8	80	true
2513	David Grieve	9	burn	8	80	true
2567	Vaughn Griggs	13	Core Asser	8	80	true
2729	Geoff Olsen	5	paint	4	80	true
2736	Jordan Muniz	4	Electronics	8	30	true
2824	Shawn Rittmani	4	Electronics	8	80	true
2849	Scott Nay	13	Core Asser	8	30	true

8 Fill out the form as desired, then click the "Create" button.

The screenshot displays a software interface with a bar chart at the top and a data table below. A modal dialog box is open over the table, allowing for the creation of a new record. The dialog box contains the following fields:

- Employee ID: 1017
- Pool: 15
- Hours: 40
- Efficiency: 80
- Default:

The 'Create' button is highlighted with an orange circle. The background table has the following data:

ID	Casual Name	Pool ID	Title	Hours		
	Craig Olsen	11	blast	8		
	Jaime Manrique	4	Electronics	40		
	Wilfred Atutiga	3	Bend 175T	8		
	David Grieve	9	burn	8	80	true
	Vaughn Griggs	13	Core Asser	8	80	true
	Geoff Olsen	5	paint	4	80	true
	Jordan Muniz	4	Electronics	8	30	true
	Shawn Rittmani	4	Electronics	8	80	true
	Scott Nay	13	Core Asser	8	30	true
	Joseph Arbon	13	Core Asser	8	80	true

 The following steps show how to edit an existing employee's settings.

9 Click on your desired record from the list.

The screenshot shows a dashboard with a bar chart at the top and an 'Employee Setup' table below. The bar chart displays data points over time from May 2025 to November 2025. The table has columns for Employee ID, Casual Name, Pool ID, Title, Hours, Efficiency, and Default. The record for Tony Snyder (Employee ID 1017) is highlighted with an orange circle.

Employee ID	Casual Name	Pool ID	Title	Hours	Efficiency	Default
1017	Tony Snyder	15	weld	40	80	true
1605	Craig Olsen	11	blast	8	80	true
1654	Jaime Manrique	4	Electronics	40	80	true
2322	Wilfred Atutiga	3	Bend 175T	8	80	true
2513	David Grieve	9	burn	8	80	true
2567	Vaughn Griggs	13	Core Asser	8	80	true
2729	Geoff Olsen	5	paint	4	80	true
2736	Jordan Muniz	4	Electronics	8	30	true
2824	Shawn Rittmani	4	Electronics	8	80	true
2849	Scott Nay	13	Core Asser	8	30	true

10 Click the "Edit" button located in the list header.

This screenshot is identical to the previous one, but with an orange circle highlighting the 'Edit' button in the table's header row. The 'Employee ID' 1017 record is also highlighted in blue.

Employee ID	Casual Name	Pool ID	Title	Hours	Efficiency	Default
1017	Tony Snyder	15	weld	40	80	true
1605	Craig Olsen	11	blast	8	80	true
1654	Jaime Manrique	4	Electronics	40	80	true
2322	Wilfred Atutiga	3	Bend 175T	8	80	true
2513	David Grieve	9	burn	8	80	true
2567	Vaughn Griggs	13	Core Asser	8	80	true
2729	Geoff Olsen	5	paint	4	80	true
2736	Jordan Muniz	4	Electronics	8	30	true

11 Make your changes to the record as desired, then click the "Update" button.

The screenshot displays a software interface with a data table and a modal form. The table has columns for ID, Casual Name, Pool ID, Title, and Hours. The modal form contains fields for Employee ID (1017), Pool (15), Hours (40), and Efficiency (70), along with a checked 'Default' checkbox and an 'Update' button. The 'Update' button is circled in orange.

ID	Casual Name	Pool ID	Title	Hours		
	Tony Snyder	15	weld	40		
	Craig Olsen	11	blast	8		
	Jaime Manrique	4	Electronics	40		
	Wilfred Atutiga	3	Bend 175T	8	80	true
	David Grieve	9	burn	8	80	true
	Vaughn Griggs	13	Core Asser	8	80	true
	Geoff Olsen	5	paint	4	80	true
	Jordan Muniz	4	Electronics	8	30	true
	Shawn Rittmani	4	Electronics	8	80	true
	Scott Nay	13	Core Asser	8	30	true

 The following steps show how to delete a record from the list.

12 Select your desired record from the list.

The screenshot shows an 'Employee Setup' interface. At the top, there is a bar chart with a y-axis from 0 to 500 and an x-axis with dates from 5/26/2025 to 11/17. Below the chart is a table with columns: Employee ID, Casual Name, Pool ID, Title, Hours, Efficiency, and Default. The 'Delete' button in the table header is circled in orange.

Employee ID	Casual Name	Pool ID	Title	Hours	Efficiency	Default
1017	Tony Snyder	15	weld	40	70	true
1605	Craig Olsen	11	blast	8	80	true
1654	Jaime Manrique	4	Electronics	40	80	true
2322	Wilfred Atutiga	3	Bend 175T	8	80	true
2513	David Grieve	9	burn	8	80	true
2567	Vaughn Griggs	13	Core Asser	8	80	true
2729	Geoff Olsen	5	paint	4	80	true
2736	Jordan Muniz	4	Electronics	8	30	true
2824	Shawn Rittmani	4	Electronics	8	80	true
2849	Scott Nay	13	Core Asser	8	30	true

13 Click the "Delete" button in the list header.

This screenshot is identical to the one in step 12, but the 'Delete' button in the table header is highlighted with a larger orange circle.

Employee ID	Casual Name	Pool ID	Title	Hours	Efficiency	Default
1017	Tony Snyder	15	weld	40	70	true
1605	Craig Olsen	11	blast	8	80	true
1654	Jaime Manrique	4	Electronics	40	80	true
2322	Wilfred Atutiga	3	Bend 175T	8	80	true
2513	David Grieve	9	burn	8	80	true
2567	Vaughn Griggs	13	Core Asser	8	80	true
2729	Geoff Olsen	5	paint	4	80	true
2736	Jordan Muniz	4	Electronics	8	30	true



The record will be deleted immediately; ensure you are deleting the correct record as desired.