

# Pool Resource Setup for Capacity



The below steps show how to create a Pool Resource.

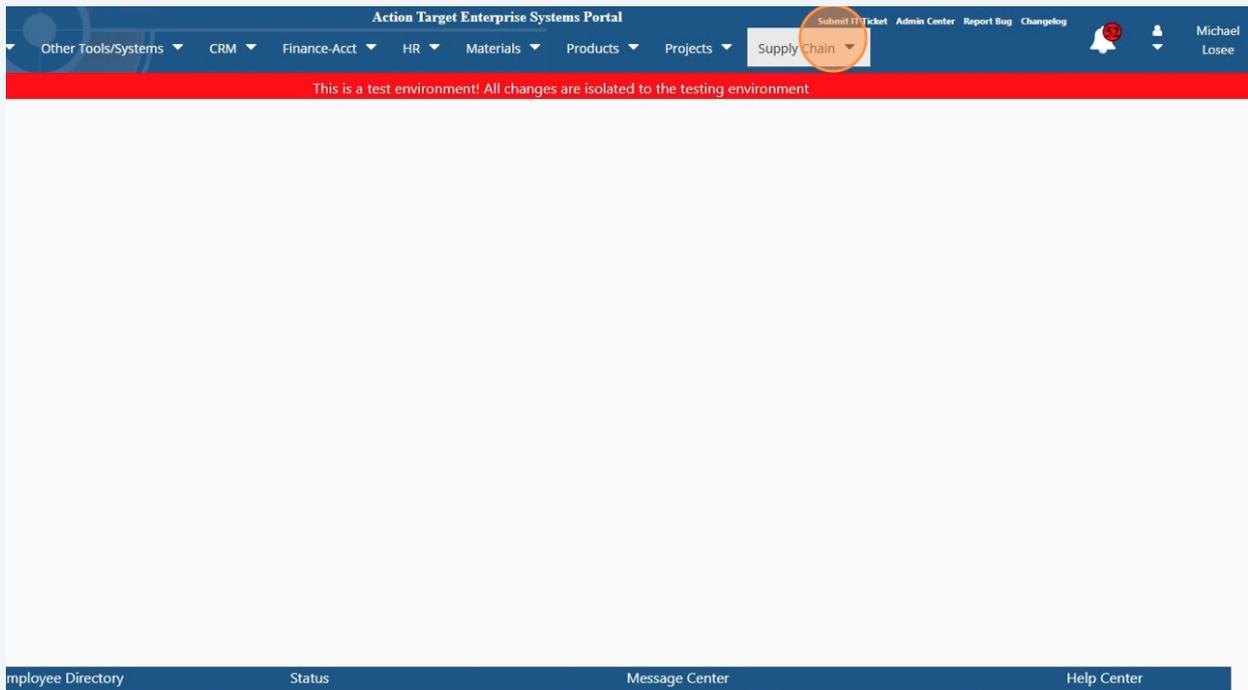
1

Navigate to the Action Target Enterprise Portal.

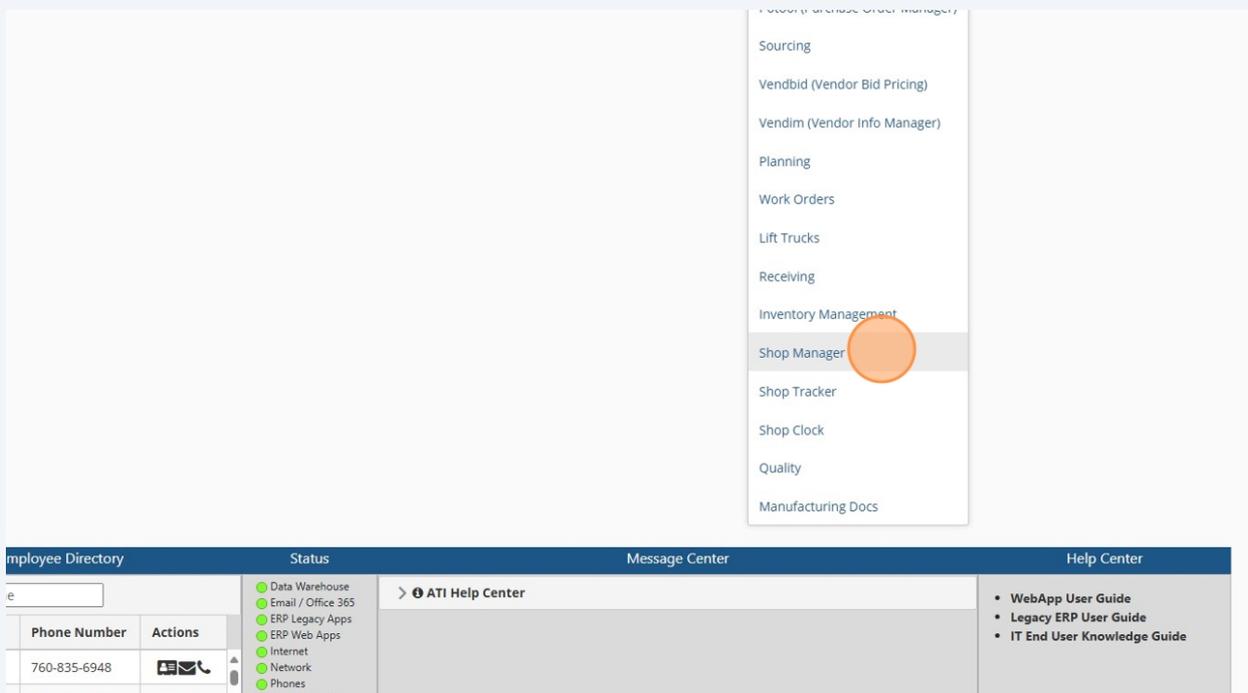
This is a test environment. All changes are isolated to the testing environment.

Employee Directory			Status	Message Center	Help Center
<input type="text" value="Employee Name"/>			<ul style="list-style-type: none"><li>Data Warehouse</li><li>Email / Office 365</li><li>ERP Legacy Apps</li><li>ERP Web Apps</li><li>Internet</li></ul>	> <b>ATI Help Center</b>	<ul style="list-style-type: none"><li>WebApp User Guide</li><li>Legacy ERP User Guide</li><li>IT End User Knowledge Guide</li></ul>
Employee Name	Phone Number	Actions			

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



3 Click on the "Shop Manager" tool from the drop down menu.



4 Click on the "Capacity" tab located near the top of the tool.

The screenshot shows the 'Action Target Enterprise Systems Portal' interface. At the top, there is a navigation bar with various menu items like 'Legacy ERP', 'CRM', 'Finance-Acct', etc. Below this is a red banner stating 'This is a test environment! All changes are isolated to the testing environment'. The main header is 'Shop Manager'. A secondary navigation bar contains tabs: 'Schedule', 'Work Bench', 'Nesting', 'Setup', 'Management', 'Capacity', 'Documents', 'Time', 'Jobs', 'WO Data', and 'Tables'. The 'Capacity' tab is highlighted with an orange circle. Below the tabs is a 'Schedule Builder' section with buttons for 'Show Master', 'Hide Schedule', 'Show Hours', 'Show Op Time', and 'Show Logs'. The main area displays a 'Shop Schedule' table with 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 several rows of work order 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 Hk	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	59789	mo-172214-4	1	16	21882	-Redline- Man	elec-assembly		Mancom Fixed Lateral Weat	2025-05-06	sta
6	59786	mo-172202-4	1	16	21882	-Redline- Man	elec-assembly		Mancom Fixed Lateral Weat	2025-05-06	sta
6	60186	mo-172775-3	1	8	26303	Genesis Retri	elec-assembly		Genesis Retriever Turning C	2025-05-06	sta

5 Click on the "Show Resources" button in the Capacity management header.

The screenshot shows the 'Capacity Management' section of the portal. The 'Capacity' tab is selected in the navigation bar. Below the tabs is a 'Management' section with buttons for 'Show Employee Setup', 'Show Exceptions', 'Show Time Off', 'Show Holidays', 'Show Resources', 'Show Graph Details', 'Graph', and 'Refresh Capacity'. The 'Show Resources' button is highlighted with an orange circle. Below the buttons is a summary section with the following data: Scheduled: 8877.06, BackLog: 2619.74, Planned: 6772.01, Pending: 374.87, and Quote: 0. The date '025 10:23:41 AM' is also visible. At the bottom, there is a legend for Capacity (green), Scheduled (blue), Planned (pink), Pending (orange), and Quote (yellow), followed by a large empty grid area.

6 Scroll down to view the Pool Resource list.

7 Click the "Add" button in the pool resource list header.

The screenshot displays a software interface. At the top is a bar chart with a y-axis ranging from 0 to 2000 and an x-axis showing dates from 5/26/2025 to 11/17. The chart contains several bars in blue, green, and red. Below the chart is a table titled 'Pool Resources'. The table has a header row with columns: Pool ID, Pool Name, Title, Notes, Hours, Efficiency, and Def Avail. Below the header is one data row with values: 5, paint, Paint Boot, Test, 25, 80, 20. Above the table, there are four buttons: 'Refresh', 'Add', 'Edit', and 'Delete'. The 'Add' button is circled in orange. At the bottom of the table, there is a pagination control showing '1'.

Pool ID	Pool Name	Title	Notes	Hours	Efficiency	Def Avail
5	paint	Paint Boot	Test	25	80	20

8

Fill out the form in the pop-up window as desired then click the "Create" button.

The screenshot displays a software interface with a Gantt chart at the top and a 'sources' table at the bottom. A pop-up form is overlaid on the Gantt chart, containing the following fields:

- Title: Test
- Notes: (empty text area)
- Pool Name: burn
- Hours: 20
- Efficiency: 80

The 'Create' button is highlighted with an orange circle. The 'sources' table below the Gantt chart has the following data:

Pool Name	Title	Notes	Hours	Efficiency	Def Avail
paint	Paint Boot	Test	25	80	20



The following shows how to edit a Pool Resource.

9 Click on your desired record from the list.



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



**11** Make your changes to the record as desired. Then click the "Create" button.

The screenshot displays a software interface with a modal form for creating a record. The modal form has the following fields:

- Title: Paint Booth
- Notes: Test
- Hours: 20
- Efficiency: 80

A "Create" button is highlighted with an orange circle. Below the modal is a table with the following columns: Pool Name, Title, Notes, Hours, Efficiency, Def Avail. The table contains one row:

Pool Name	Title	Notes	Hours	Efficiency	Def Avail
paint	Paint Booth	Test	25	80	20

**i** The following shows how to delete a pool resource record.

12 Select your desired record from the list.

The screenshot displays a software interface with a bar chart at the top and a table below. The bar chart shows data points for various dates from 5/26/2025 to 11/17, with values ranging from 0 to 2000. The table, titled "Pool Resources", has columns for Pool ID, Pool Name, Title, Notes, Hours, Efficiency, and Def Avail. The first row of data is highlighted in blue, and the "Notes" cell contains the text "Test". A red circle highlights the "Notes" column header.

Pool ID	Pool Name	Title	Notes	Hours	Efficiency	Def Avail
5	paint	Paint Boot	Test	20	80	16

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

This screenshot is identical to the one in step 12, but the "Delete" button in the table's header is highlighted with a red circle. The table data remains the same, with the first row highlighted in blue.

Pool ID	Pool Name	Title	Notes	Hours	Efficiency	Def Avail
5	paint	Paint Boot	Test	20	80	16

14 Confirm your deletion by pressing the "Yes" button.

The screenshot shows a Gantt chart interface. A modal dialog box is centered on the screen, titled "Confirm" with a close button (X) in the top right corner. The dialog contains the text "Delete pool resource?" and two buttons: "Yes" (with a checkmark icon) and "Cancel" (with an X icon). The "Yes" button is highlighted with an orange circle. The background is a Gantt chart with a grid and various colored bars (green, blue, red, brown) representing tasks over time. The x-axis shows dates from 6/2/2025 to 12/1/2025. Below the chart is a control bar with "Refresh", "Add", "Edit", and "Delete" buttons. Below that is a table with columns: Name, Title, Notes, Hours, Efficiency, and Def Avail. The table has one row with the following data: Name (empty), Title "Paint Boot", Notes "Test", Hours "20", Efficiency "80", and Def Avail "16".

Name	Title	Notes	Hours	Efficiency	Def Avail
	Paint Boot	Test	20	80	16