



BIG BOARD

ROME MANAGEMENT USER GUIDE

BIG BOARD

Rome Management's production Big Board helps management get a "Bird's Eye" view of the active jobs in the shop. The Big Board will display any job that has the In Shop check box checked, and does not have a Date Out. If an RO does not have the In Shop check box checked or has a date in the Date Out field, it will NOT show up on the Big Board. Keeping the Big Board up to date makes it easier for management and customer service to know the status of a vehicle.

Date Range - Defaults to two years in the past to two years in the future. This should ensure that you don't miss any misdated ROs.

Location check boxes - Will let you display or filter out cars that not arrived, Cars on the lot and cars in production. Total loss check box will display or filter out RO that have the Total loss check box checked. Completed check box will display or filter out ROs that have a Date Completed.

Car status check boxes - Will display or filter based on the production status of the car. Red cars are ROs that.

Production Decision-making

Initiate Blueprinting

COMPLETED BY WITHIN 1 - 3 hours from time of vehicle possession

- Action**
1. Check "Blueprint" box
 2. Write estimate at the car
 3. All involved parties review estimate at the car
 4. Update staging box:waiting for parts in repair order

RESPONSIBILITY Production or Writer

RESULT Full vision of the pre-collision condition of the vehicle

Initiate Dispatching

- Action**
1. Check "waiting for parts" box
 2. Check mission critical parts column for availability
 3. Run technician load level report/select technician/assign labor
 4. Update in shop checkbox in repair order
 5. Print shop repair order/copy of estimate/give to technician
 6. Verify accurate data due

RESPONSIBILITY Production/Writer

RESULT Vehicle is in production

Initiate Walk Around

- Action**
1. Define production tasks per vehicle per technician on the Big Board screen
 2. Verify vehicle inventory
 3. Make sure all cars are on schedule (Green)
 4. Verify accurate vehicle designation
 5. Verify accurate Date Due







RESPONSIBILITY Production/Writer

RESULT Stage is set for daily tasks to be completed by technicians





Car Status/ RO number

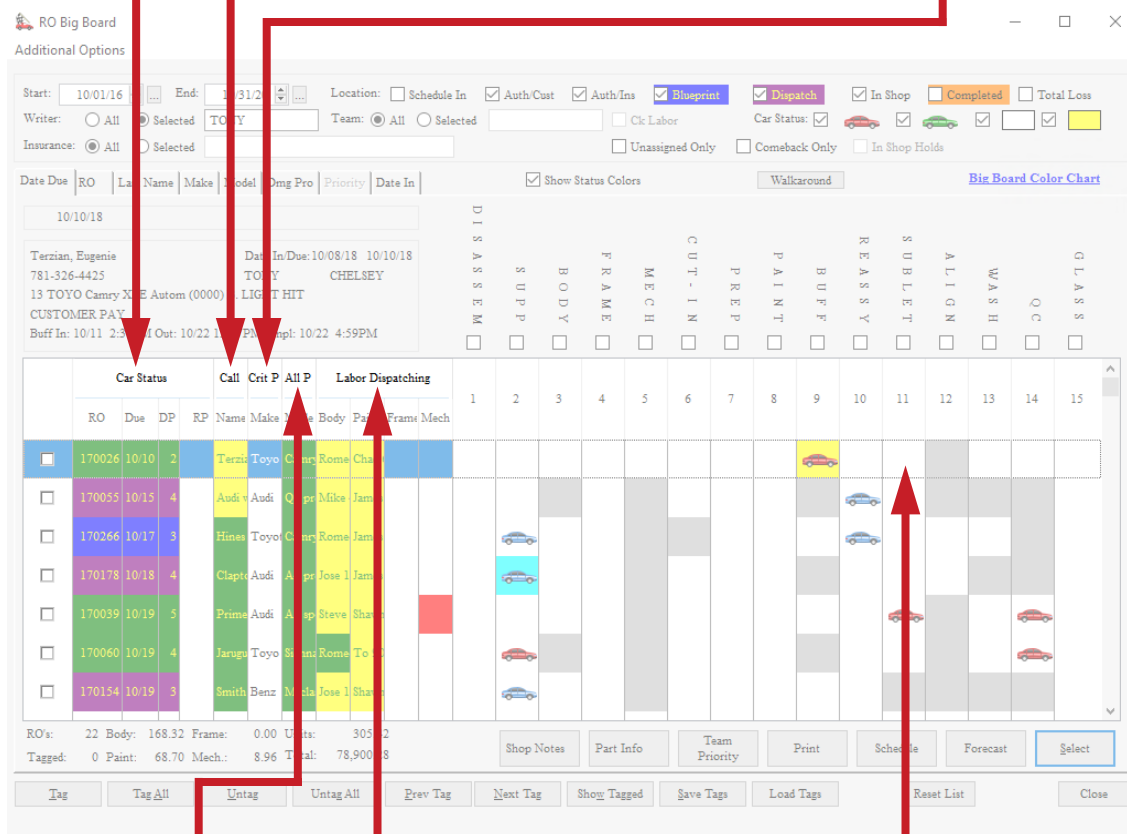
-  Blueprint
-  W Parts
-  Completed





Customer Service Calls/Name

-  Call for Due date update
-  Call for due date & schedule
-  Scheduled callback
-  Customer callback is current
-  Customer requested callback
-  Task status change callback





Car Status/ RO number

-  No critical part on the job
-  No critical parts received
-  Some critical parts received
-  All critical parts received





**All parts List/Model**

-  No parts on the job
-  No parts received
-  Some parts received
-  All parts received

Labor Dispatching/Tech

-  No labor
-  No labor assigned to tech
-  Some labor assigned to tech
-  All labor assigned to tech

Task Status

-  Car in staging
-  Car on schedule
-  Car behind schedule
-  Car stalled

DISPLAY COLUMNS

RO - Displays the RO number

Body - Display the team name assigned to the most units of Body labor

Paint - Display the team name assigned to the most units of Paint labor

Frame - Display the team name assigned to the most units of Frame labor

Mech - Display the team name assigned to the most units of Mech labor

15 Tasks - The next 15 columns are the 15 “tasks” of the repair order that have been defined by management. The name of the tasks is displayed in the area above the column. There are four different types of entries that can be in the column:

Blank - a blank display means the particular task is not being performed in this RO.

/ - A slash means that the task-has not been started yet and still needs to be done.

O - An O means that the tasks is currently being worked on.

X - An X means that the task has been completed.

Estimated Units - These columns display the body, frame, paint, mech, and total units in the repair order.

BUTTONS:

Completed - Opens the RO schedule Tasks screen and automatically checks the Completed RO check box.

Insert - This button is used to re-add an RO from the production schedule that was removed using the Delete key below.

Change - Opens the RO Schedule Tasks screen for editing.

Delete - Used to remove an RO from the production schedule. It will not delete the RO from the system just the schedule. The RO can be read later by using the Insert button above.

Close - Closes the production Schedule window.

The next Heads Up field used to be used to update the Red Alert screen. The program handles this differently now so this field has been made obsolete.

Click OK and the changes will be saved.

ROME

STATUS GRID REPORT

The status grid report is one of the most important and useful report in Rome Management. It's most popular use is for printing out route sheets for the techs to know what jobs they should be working on. Press the Status Grid button on the Reports tab in the Production window to bring up the Status Grid Report Options screen.

Let's go over all the different options available for this report.

SORT OPTIONS TABS

The Sort Options tabs are for setting the primary and secondary sort method of the report. The report will first be sorted by the option in Sort 1 then have sub-groups of the category in Sort 2. For instance, if you choose Insurance in Sort and Writer in Sort 2 the report will display the ROs grouped by Insurance and for each company there will be subgroups for the Writers. If you just want to sort by one option select that option in the Sort 1 tab and then select All in the Sort 2 tab.

There are five different choices:

All - This method works more like a None option because it displays all the ROs in sequential order by RO number.

Writer - This will let you run the report for one writer or for all of them. If you want to just see the ROs for a specific writer, put the dot on Individual and enter the writers name in the field. If you want to run the report grouped by writer you would put the dot in All.

NOTE: The first group of ROs printed on this report will be ones that have no writer.

Team - This will let you run the report for one team or for all of them. If you want to just see the ROs for a specific team, put the dot on Individual and enter the team name in the field. If you want to run the report for all ROs grouped by team you would put the dot in All.

Task - Selecting this option and selecting All will print a report grouped by task. If an RO has a slash(/) entered for a task it will show up in this report under that heading. If you select Individual the Tasks tab will be activated so you can use the option in there to run the report.

Insurance - This will let you run the report for one insurance company or for all of them. If you want to just see the ROs for a specific insurance company, put the dot on Individual and enter the company name in the field. If you want to run the report for all ROs grouped by insurance company you would put the dot in All.

Page break after Subtotals box

Checking this box will put a page break after the subtotal ensuring that the next group will start on a fresh page. So if you sort by Writer after the first writer subtotal it will begin the next writer on a fresh page. You can only select to have a page break on Sort 1, not on Sort 2.

The screenshot shows the 'Status Grid Report Options' dialog box with the 'Sort Options' tab selected. The 'Sort Method' section has radio buttons for 'All' (selected), 'Writer', 'Team - Grid', 'Team - Assigned', 'Task', and 'Insurance'. The 'Sort Detail' section has radio buttons for 'All' (selected) and 'Individual'. Below these sections is a checkbox labeled 'Page Break After Subtotals' which is currently unchecked. At the bottom, there is a 'Report Defaults' button with a green checkmark icon, and 'OK' and 'Cancel' buttons.

TASKS TAB

The Tasks tab is only available if you select Task and Individual on one of the Sort option tabs.

Here you select the options or combination of options you want displayed on the report. You may select more than one option and if an RO matches anyone of the parameters it will be included in the report under the heading of the parameters it matches.

The screenshot shows the 'Status Grid Report Options' dialog box with the 'Tasks' tab selected. The 'Task Status' section has checkboxes for 'To Do (/)' (selected), 'In Process (0)', and 'Completed (X)'. The 'Task Descriptions' section has a grid of checkboxes for various task types: DISASSEMBLY, SUPP, BODY, FRAME, MECH, CUT-IN, PREP, PAINT, BUFF, REASY, SUBLET, WASH, QC, PDR, and . (empty). At the bottom, there is a 'Report Defaults' button and 'OK' and 'Cancel' buttons.

REPAIR ORDERS TAB

The first section lets you choose to filter the report to display certain kinds of ROs

ROs with Tasks to Do will only display ROs that have tasks with a slash(/).

ROs with Blueprint Heads Up will display ROs that have fallen behind the blueprint schedule.

ROs Completed will display ROs that have been marked as Completed on the Production Schedule

All ROs is like a None of the Above choice in this case and will not filter the ROs other than what you selected in the Sort tabs.

The screenshot shows the 'Status Grid Report Options' dialog box with the 'Repair Orders' tab selected. The dialog has several sections: 'Include ROs' with radio buttons for 'ROs With Task(s) "To Do"', 'ROs Blueprint Heads Up', 'ROs Completed', and 'All ROs' (which is selected); 'ROs Listed By' with radio buttons for 'RO Number' (selected), 'RO Date Due', 'RO Date In', and 'RO Forecast'; 'RO Status' with checkboxes for 'In Shop Active RO's' (checked), 'Staging Active RO's', 'All Active Not Dated Out RO's', 'Include Completed' (checked), and 'Include Total Loss RO's'; and 'Date Range' with 'Starting Date' and 'Ending Date' both set to 2/03/21. At the bottom are buttons for 'Report Defaults', 'OK', and 'Cancel'.

RO status section is another place where you can filter the ROs that will be displayed

In Shop Active ROs - Will only show ROs that have the In Shop check box checked and are not dated out.

Staging Active Ros - Will only display ROs that have the Staging box checked and the In Shop box unchecked.

All Active Not Dated Out ROs will display any job that is not dated out.

ROs listed by Section is where you can choose what order to display the ROs in.

RO number will display the ROs in ascending order by the RO number.

RO Date Due will display the ROs in ascending order by Date Due

RO Date In will display the ROs in ascending order by Date In

Date Range - This sets the date range parameters for the report. Any active RO with a Date Due within this range will be included in the report.

OTHER TAB

Include labor Units - Checking this box will display the labor units in any labor type that applies.

Total Units or Amounts - You can select whether the total units or the or total revenue dollars are displayed in the total column of the report.

License or Color - You can choose whether to display the license number or the color of the vehicle on the report.

Insurance or Key tag - You can choose to print the insurance company or the Key tag number on the report.

Repair Order Notes - If you want to print the notes in the RO on this report check the Print Notes check box and put in a date range. Notes in the RO whose date falls within the range will be printed in an area below that ROs entry in the report.

The screenshot shows the 'Status Grid Report Options' dialog box with the 'Other' tab selected. The 'Include Labor Units' checkbox is checked. Under 'Total Units Or Amount', 'Total Labor Units' is selected. Under 'Insurance Or Key Tag', 'Insurance Company' is selected. Under 'License Or Color', 'License' is selected. The 'Print Notes' checkbox is unchecked. The 'Starting Date' and 'Ending Date' fields are empty. The 'Report Defaults', 'OK', and 'Cancel' buttons are at the bottom.

PAPER TAB

This tab will let you chose the layout of the report.

Legal - This is the full report and displays the most information. This report can only fit on legal paper so you will need to load legal paper into your printer to print out the whole report. Here are the columns that are displayed in this format:

RO Number - The RO number of the job

Bar Code - The bar code of the vehicle that can be scanned

The screenshot shows the 'Status Grid Report Options' dialog box with the 'Paper' tab selected. Under 'Paper Size', 'Legal' is selected. Other options include 'Letter With Barcodes', 'Letter Without Barcodes', 'Letter Without Grid', 'Letter With Car Information', and 'Letter With Prep Team'. The 'Report Defaults', 'OK', and 'Cancel' buttons are at the bottom.

Name/Status - The name of the customer and the status of the RO (Complete or Incomplete).

YR - Year of the vehicle

Make /Model - The make and model of the vehicle.

License/Insurance/Color/Key tag - This column will display two of the four choice depending on the selections you made in the Other tab.

ROME

Date In/Date Due - The Date In and the Date Due of the RO

Mech/Mech Units - Displays the tech assigned to the most mechanical hours and how many hours.

Frame/Frame Units - Displays the tech assigned to the most frame hours and how many hours.

Paint/Paint Units - Displays the tech assigned to the most paint hours and how many hours.

Body/Body Units - Displays the tech assigned to the most body hours and how many hours.

Written By/Total Units/Grand Total - Displays the writer and either the Total Units or Total Revenue depending on your selection in the Other tab.

Grid - The production schedule grid with the current status of the 15 “tasks”

Letter with Barcodes - This report will exclude the YR, Make/Model and License/Insurance columns but will fit on Letter sized paper.

Letter without Barcodes - This report will exclude the YR, Make/Model and License/Insurance columns and the Barcode but will fit on Letter sized paper.

Letter without Grid - This report will exclude the grid and fit on Letter sized paper

Letter with Car Information - This format will exclude the Barcode and the grid and include a Style/VIN column. This column will display the VIN and the style of the vehicle. This report will also fit on Letter paper.

Once you have all the options you want selected press OK to print the report.

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