



Throughput Consulting, Inc. – Article

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Bluestreak™ Notification C-WIP Details

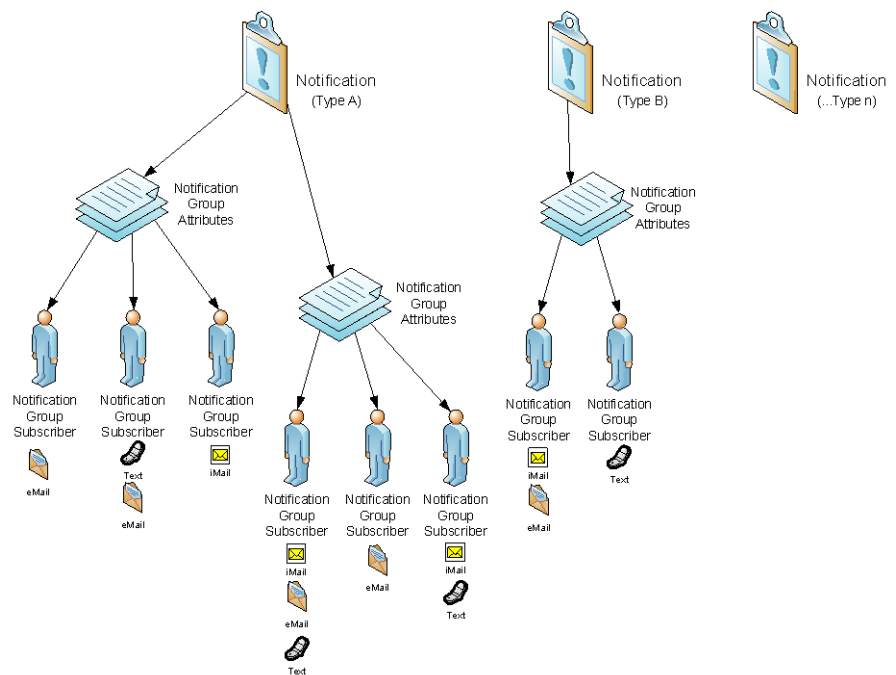
In this article we provide details of the real-time imail, email and text-message notifications, referred to as C-WIPs, available in Bluestreak™.

What's a "C-WIP"?

A C-WIP™ (pronounced "Quip") is a Collaborative Work-In-Process notification that is sent to one or more subscribers in real-time, through a Bluestreak imail, email and/or text-message to a cell phone. To send out a text message (also referred to as an SMS), both the cell phone number AND the cellular provider (like AT&T, Sprint, Nextel, etc.) are required for the subscriber.

Configuring a C-WIP Notification

The C-WIP Notification Types, listed below, can be setup into different Notification Groups. Each group will have different attributes specified, like Customer, Order #, Part #, Process, Operation or Alloy. If you do not assign an attribute, then you are effectively making that attribute a "wild card". In other words, if you do not assign a customer for a Notification Group, then all Subscribers to that group will receive a C-WIP any time that event occurs for ANY customer. If you want to limit or target the notifications, then you assign the combination of attributes you need to achieve it.



There can be an unlimited number of Notification Groups specified for the same C-WIP

Notification Type. For each group, you can assign an unlimited number of Notification Group Subscribers; a subscriber can be a Bluestreak QTI user, a customer contact or some other person that is



neither a Bluestreak™ User nor a Customer Contact in Bluestreak™. Depending upon the subscriber type, you can specify any combination of imail, email or text message notification for each subscriber.

These notifications can be managed in QTI through the System Manager/Notifications page. We will also be adding the ability to manage Order specific subscriptions in the Order module and allow customers to freely manage their subscriptions in the customer portal. Subscriptions can be added/modified/deleted at any time. It is also worth noting that whenever possible, if an event matches multiple groups and the same subscriber is in the multiple groups, the subscriber will usually only receive ONE notification instead on one for each group to which he is subscribed.

Supported C-WIP Notifications

1) **Portal Feedback**

Description: This notification has some special setup ramifications that affect what your customers will see in the customer portal. When a customer begins the process of sending some feedback to your company, he/she must specify a department to receive the message. The department list displayed is actually defined by the Name you assign to EACH Portal Feedback group you define. In other words, if you wanted to have THREE departments for your portal users to select from, you would specify THREE Portal Feedback notification groups with, perhaps, Names of “Sales”, “Technical” and “Other”. Each of those groups would have their own list of subscribers and it’s very possible that the same QTI user would be specified in multiple groups.

Group Attribute(s): None.

Triggering Event(s): When a Customer Portal user submits a feedback message.

2) **Portal Customer Pickup Request**

Description: A Customer Portal user can request a truck to come pickup parts from their facility by clicking on the “Request Pickup” link or action. They then fill out the required information and click the submit button. This functionality will likely have an option to actually specify more information in the future and will be the foundation of a new Bluestreak Order.

Group Attribute(s): Customer

Triggering Event(s): When a Customer Portal user submits a Request Pickup message.

3) **Order Entered**

Description: This event is generated every time a NEW Work Order is entered for any company. It can be used as a confirmation that part(s) were received and have been entered into Bluestreak™ to begin the processing, or to just provide a heads-up to Bluestreak™ users that an Order was entered for a particular customer.

Group Attribute(s): Customer, Process, Alloy.



Triggering Event(s): A New Work Order is entered.

4) **Order Entered for COD Customer**

Description: This event generated every time a NEW Work Order is entered for any company that has COD Terms. It can be used as reminder to follow up with the customer for pricing and to inform the front office that this Order and Customer needs to be handled differently.

Group Attribute(s): None.

Triggering Event(s): A New Work Order is entered for a COD customer.

5) **Part Added to an Order**

Description: Every part added to an Order will cause this event to be generated. One use would be to receive notifications when specific parts are received and added to a Bluestreak™ Order so the appropriate people can check to make sure the proper PO, media (photos/documents), counts or processing instructions are noted on the Order, BEFORE processing has been started.

Group Attribute(s): Customer, Order, Part, Process, Alloy

Triggering Event(s): When a NEW part (record) is added to an Order. NOT when additional part counts are added.

6) **Order Part In Operation**

Description: Every Work Order contains a list of operational steps parts flow through during processing. You can specify at which operation(s) you (and others) would like a C-WIP when parts are available for processing. An example is you are interested to know when parts are sent out for mechanical testing or perhaps when they reach the inspection operation. C-WIPs could also be sent out for EVERY operation so others can track the real-time status of parts on a cell phone or email without needing to log into the Bluestreak™ Portal.

Group Attribute(s): Customer, Order, Part, Process, Operation, Alloy

Triggering Event(s): When a quantity of at least 1 part is tracked, via Shop Floor module, into (is available at) a track-able Operation step on an Order.

7) **No Open Order Activity for x Days**

Description: When significant data is added to or modified on an Order, Bluestreak knows that there is activity happening. If you want to know when activity has stopped on an “active” Order, then you will want to use this C-WIP. There is a Bluestreak™ system setting (#21) that determines the default number of inactivity days before an inactivity notification for all customers that don’t have a different setting. Please note that this C-WIP ONLY works when the Shop Floor module is active and parts are being tracked through Order operation steps. Notifications will stop when ALL the parts have been shipped.

Group Attribute(s): Customer, Order

Triggering Event(s): Scheduled processing, typically once a day. Orders will be “caught” when



parts stop being tracked through Shop Floor loads AND not all parts have been shipped.

8) **"Concession Granted - Shipping" Note added to an Order**

Description: A concession granted – shipping note is added to an Order when there is an out of specification test result, like final hardness, when a shipping document is produced. The note will document the customer’s acceptance of the parts and typically why the parts are out of spec and who was the customer contact. This can be useful as a reminder to customers that the parts being returned may need special handling within their company.

Group Attribute(s): Customer

Triggering Event(s): When a “Concession Granted – Shipping” Note is added to an Order.

9) **Order Shipper Added (Ready to Ship)**

Description: This C-WIP is generated when a shipping document is produced for a work order. You can use this notification to let customers know when parts are ready to be shipped or are ready for pick up.

Group Attribute(s): Customer, Order, Process, Alloy

Triggering Event(s): When a shipping document is generated for an Order.

10) **Order Shipper Status Change (On-Truck/Delivered)**

Description: There is actually two ways this C-WIP will be generated. The first is when parts are loaded into the delivery truck and scanned as “On Truck”. This is useful for a customer who needs to know what day their parts will be delivered. The second is when the parts are actually delivered to the customer and someone signs-off on the delivery via the handheld device or the signature pad. This “Delivered” C-WIP will typically notify customers before their own internal systems “know” the parts are back from your processing.

Group Attribute(s): Customer, Order, Process, Alloy

Triggering Event(s): When the status of a shipper is changed.

11) **Nonconformance Generated**

Description: This C-WIP is produced every time a Nonconformance report is generated for an Order. This is useful for keeping customers “in the loop” during the processing of their parts. There will typically be a list of Bluestreak™ users already subscribed to this C-WIP for all customers.

Group Attribute(s): Customer, Order, Process, Operation, Alloy

Triggering Event(s): When a new Nonconformance is generated.

12) **Concern Record Notification**

Description: There are actually two ways this C-WIP is used and managed. The first is a list of subscribers who receive a notification when a Concern does not have an Owner OR it reaches an



inactivity number of days limit. This is the ONLY way this notification can be specified through the QTI System Manager Notifications page.

The second C-WIP type is Concern-specific and is automatically produced when an Owner is assigned to a Concern or when a Concern is added through the Customer Portal. This C-WIP notification is typically managed in the Notifications page of each Concern, but can also be managed in the System Manager Notifications page. Subscribers to Concern-specific notifications will receive a notification every time significant data is added to or changed within a Concern.

Group Attribute(s): None.

Triggering Event(s): Scheduled processing, typically once a day. Sends out No Owner, Inactivity or Data Changed notifications for all Concerns.

13) CAPA Record Notification

Description: There are actually two ways this C-WIP is used and managed. The first is a list of subscribers who receive a notification when a CAPA does not have an Owner OR it reaches an inactivity number of days limit. This is the ONLY notification that can be specified through the QTI System Manager Notifications page.

The second C-WIP type is CAPA-specific and is automatically produced when an Owner is assigned to a CAPA or when other subscribers are added through a CAPA. This C-WIP notification is typically managed in the Action Team/Notifications page of each CAPA, but can also be managed in the System Manager Notifications. Subscribers to CAPA-specific notifications will receive a notification every time significant data is added to or changed within a CAPA.

Group Attribute(s): None.

Triggering Event(s): Scheduled processing, typically once a day.

14) Concern/CAPA Added

Description: This notification is generated whenever a Concern or CAPA is added to Bluestreak™. A Concern can be added by a Bluestreak™ user from the QTI module, or by a customer contact through the Customer Portal; CAPAs can only be added by a Bluestreak™ user. Typically, subscribers to this C-WIP are the front-line responders and are responsible for assigning the Concern to an owner within Bluestreak™.

Group Attribute(s): Customer

Triggering Event(s): When a NEW Concern or CAPA is added.

Conclusions

We continue to add new Notification C-WIPs, so if you see a new notification that is not covered in this document, be sure to ask for an updated document or go online to:



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http://go-throughput.com/documents/Bluestreak_Notification_C-WIP_Details.pdf

If the goal of your company is to be the “internal” or “captive” metal treating department for your customers, or you just want to dramatically reduce the number of phone calls you receive and make to update your customers, then you need to be actively using the tools and information provided to you through the Bluestreak™ Shop Floor, Customer Portal and Notification C-WIPs.

If you have any questions, please contact Todd Wenzel or Patrick Burdick at (888) 785-0509, or email them at info@go-bluestreak.com.

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