

Work Instruction: Creating an Instruction Manual

1. Audience

Engineering scheduler, or qualified engineering personnel.

2. Objective:

The purpose of this work instruction is to create a Manual for the equipment manufactured by Caldwell.

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	6/15/18	Original issue.	Eicher

4. Scope

The scope of this work instruction is to create an operators manual for the equipment manufactured by Caldwell.

5. Prerequisites

M1 competence, Microsoft word, and Engineering database folder navigation and write access.

6. Records

Templates based on product line, private branding, and age (preBTH, or BTH compliant) are located:

N:\EngDocs\MANUALS

New files created will get place in folder

N:\EngDocs\MANUALS\Order_Manuals\SHIPPED_2018\ (by year)

7. Associated Documents

- Some models have templates created:
N:\EngDocs\MANUALS\STANDARDS_TEMPLATES
- Or use reference manuals pulled from previous years
N:\EngDocs\MANUALS\Order_Manuals

8. Evaluative Factors

- M1> Sales Order Backlog (Manuals)

9. Responsibility

- Engineering currently produces all Manuals.

10. Instructions

Step 1: Using M1 find the Job number needing a Manual. One way to identify jobs needing manuals is by accessing the Sales Order Backlog(Manuals) KPI. In the sales order details identify if it is private branded or a Caldwell product and what model line and size it consists of.

M1 Explorer - The Caldwell Group - ***Live*** Database - bwagner

Friday, June 15, 2018

KPIs

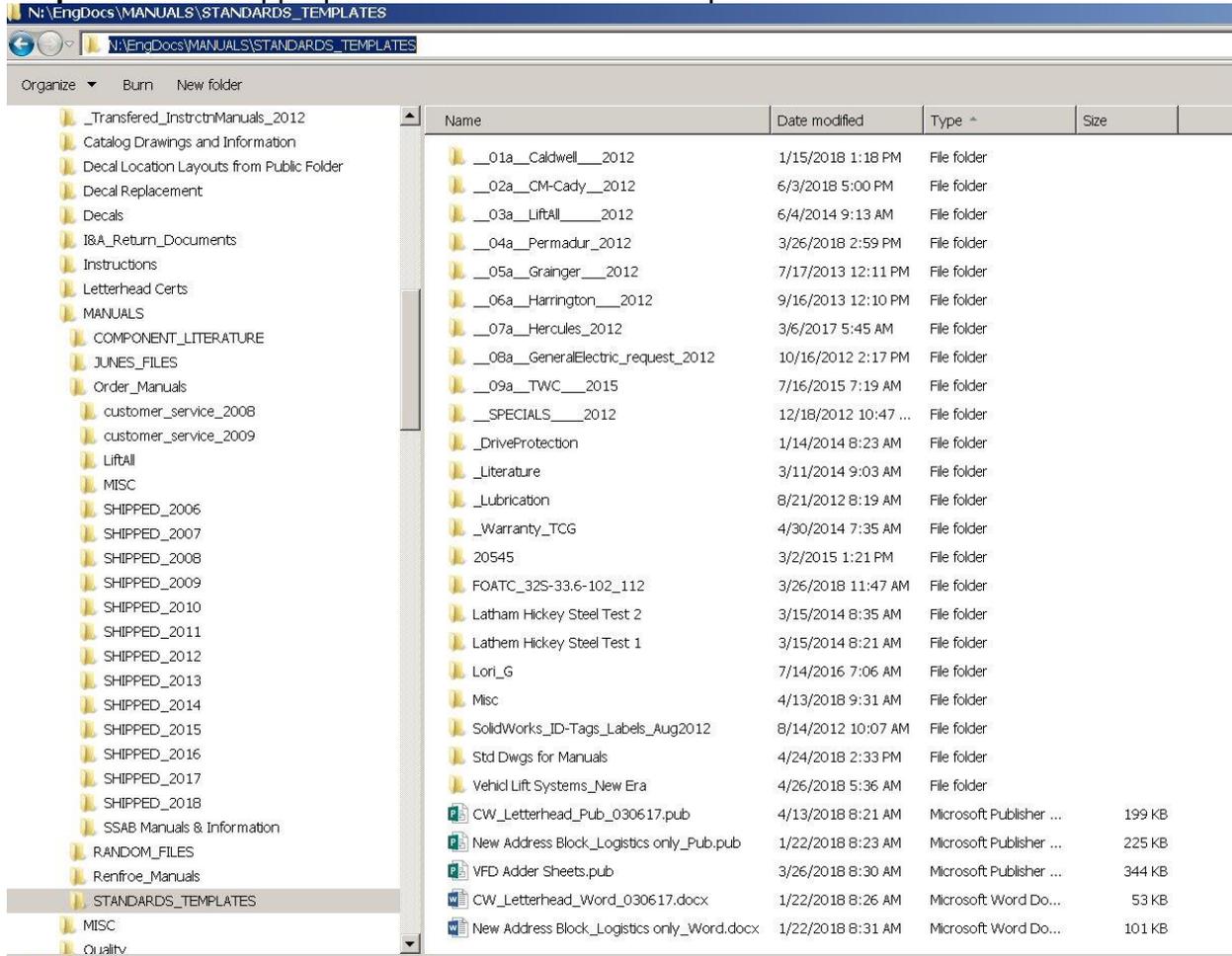
Action Items

Description									
Unprocessed Sales Order Lines (Eng)	7								
Unprocessed Sales Orders	32								
Engineering Operations Behind Schedule	36								
Jobs To Be Planned no Eng Req	6								
Sales Order Backlog Caldwell Mfg	669	2,549,278.271							
Sales Order Backlog Renfro Mfg	380	363,051.49							
Jobs To Be Planned Released Eng	6								
Sales Order Backlog (LetterheadCerts)		0.00							
Sales Order Backlog (Manuals)		0.00							
Engineering Operations By Engineer (Brian Wagner)	10								
Unprocessed Sales Orders (Dwgs and Ltrs)	1								
On Hold Jobs	23								
Sales Order Backlog	1,190	4,108,389.821							
Sales Order Backlog (All Manufacturing)	1,049	2,912,329.761							
Sales Order Lines with Eng Req Problem	0								
Active Employees	145								
Engineering Operations	148								
Electrical Backlog Approvals	1								
Electrical Backlog Design	3								
Electrical Backlog Assembly	34								
Open Jobs Awaiting Engineering Final Review	1								
Open Jobs Waiting for Engineering Review	5,938								
Instruction Manuals	0								
Waiting for Customer Approval	5								

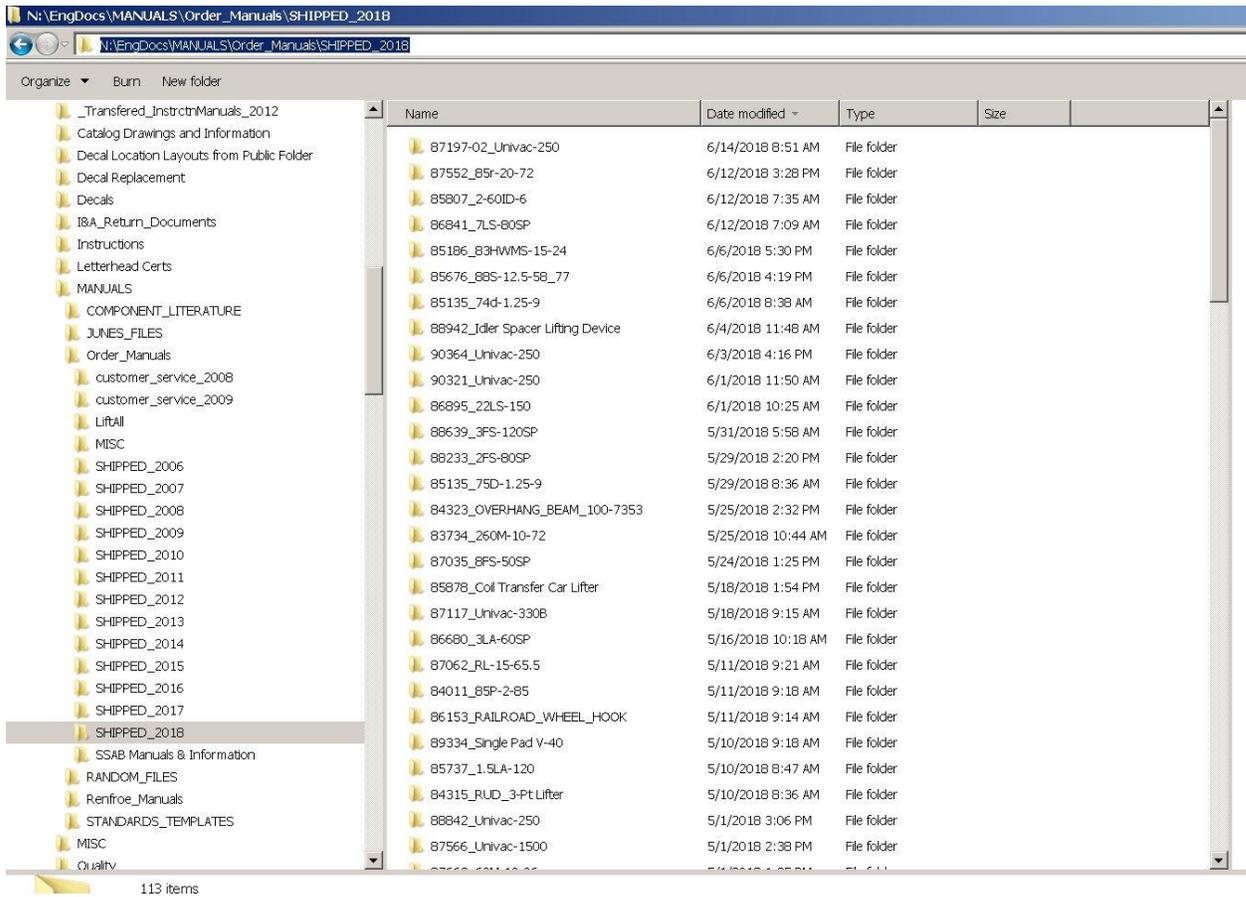
Review Items

Description									
Net Sales by Class	66,535								
Organizations	4,764								
Sales Order Backlog (Engineering)	141	1,196,060.06							

Step 2: Find the appropriate brand and model template if available.

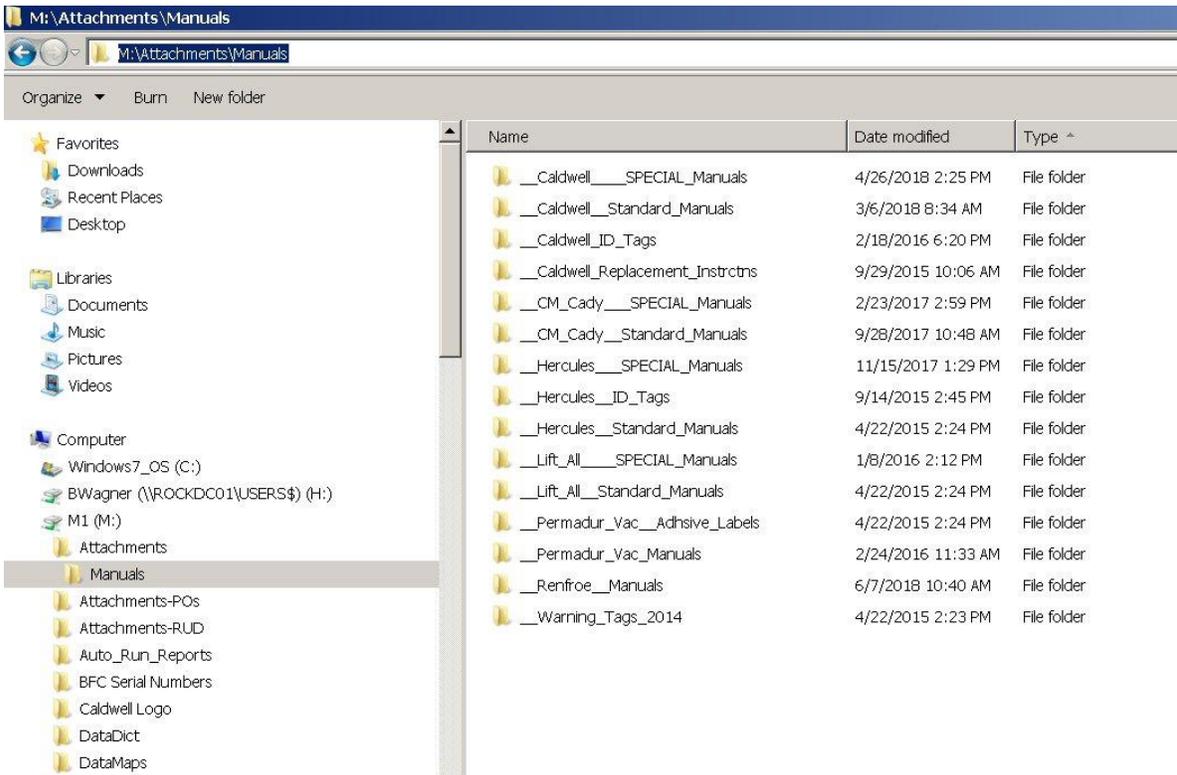


Copy the proper template and paste into the appropriate year folder to which it applies. Create and name the folder to match the project number-model number for further identification. Name the document by Project#-manual.



Step 3: Open the new copy and edit the Model number, Date created, and product title and description, add serial Number, and any other required information to adequately detail the variables that apply to said project.

Step 4: Output pdf, and save in the sales job folder.
M:\Attachments\Manuals\ (appropriate sub-folder) \



STEP 5: Attach the PDF file to the Sales order.

