CHECKLIST

10 Important Graphical Functions a Visual Planning Board Should Have

When it comes to production planning, graphical planning boards provide valuable assistance as to visualizing complex contexts and clarifying production planning data.

What are the "basic functions" that a graphic planning board used in production firms needs to offer to impart meaningful information and support the decision maker and planner in the best possible way? What features are usually regarded as standard by users but (unfortunately) are often not included in delivery?

This checklist sums up 10 functions that we consider essential in a graphical planning board.

☐ **SWITCHING BETWEEN MACHINE AND ORDER VIEW**

Production is no one-dimensional process - so why not use multi-dimensional views and keep track of the delivery dates in the order view and optimize the resource load in a machine view?

☐ **FLEXIBLE AND INFINITELY VARIABLE TIMESCALE**

Planning horizons are never static. Sometimes you may need a rough overview of what to expect in the next weeks while on other occasions you immediately want to delve into the daily details. Expand or shrink the timescale by mousewheel and zoom stepless from long-term overview into short-term planning.

☐ **VISUALIZATION OF GROUPS**

Summarize information according to contents: Production orders together with suborders and operations; departments with work groups and work centers. Use one-, two- or multilevel grouping for creating a general overview and at the same time accessing detailed information after having expanded the respective levels.

INTERACTIVE MOVING OF OPERATIONS

☐ Only a living plan that can be adjusted to reality is a good one. Drag drop allows for intuitive, quick and simple planning while never losing track of the modifications' effects on the overall plan.

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☐ **INDIVIDUAL CALENDAR SETTINGS**

One-, two- or even multi-shift work? No problem for a state-of-the-art planning board. Define individual calendars with different working times for each machine or resource. It goes without saying that the individual calendars will not only be visualized but will also take effect on the (re)-scheduling.

☐ **HISTROGRAM FOR DISPLAYING CAPACITIES**

You want to use the graphical planning board to manage the machine load? For this, you should enrich the Gantt chart with a capacity graph ("histogram") so that bottlenecks as well as unused resources can be recognized immediately.

☐ **VISUALISIZATION OF DEPENDENCIES**

If multi-level production is concerned it will not do to plan the single operation only. It's important to know the effects the modification will have on the succeeding and the preceding operations. Recognize and plan interlinked operations or order networks by making links visible.

☐ **AUTOMATIC SCHEDULING**

Don't only visualize dependencies but also take them into account while rescheduling. Interlinked, i.e. dependent operations will move automatically when a node of the chain or the net is moved.

☐ **VISUAL ALERTS**

They are often overlooked but could actually be considered the "soul" of visual planning: Visual alerts kind of translate your business rules into the planning board and thus bring them to the planner's attention. Use data-driven visualization and send signals to warn the planner if there's the risk of not keeping a delivery date or if operations on machines could overlap.

☐ **PRINT FUNCTIONALITY**

Sometimes we have the impression that the "paperless office" is mainly preached by those providers that are not able to properly print complex things like a production plan spanning several weeks☺. Print versions of planning boards are a valuable means of communication in meetings and presentations.