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Volume 1 Issue 6

August 1996

CHARTS

What are they and why would I want to use them? Charts are generally used for rotational items (disk/tape/data case, etc. accounts with repetitive scheduling of pickups and deliveries—i.e., every day, every Tuesday, etc.) These items will NOT have a bar code—bar-coded items are referred to as archival items. Some benefits to using a chart are:

Advantages

- 1) Software remembers preset schedules thereby reducing the risk of missing a rotation.
- 2) Software can be instructed to automatically generate the preset charts; reducing the need to manually key information for each individual chart—thereby lowering labor costs.
- 3) Paper consumption is reduced by using one work order for a maximum of ten (10) rotations, rather than using a separate work order for each rotational date.
- 4) The labor cost is also passed on when the work orders are finished—staff is required to finish one work order for several dates rather than individual work orders for each rotation.

Disadvantages

If you lose or accidentally destroy a chart after it has been used for prior rotations, you have lost your record of rotational activity for the previous days.

Andrews has used this "chart" feature for several years. We generate approximately 500 charts per month. This results in a considerable amount of savings—taking into consideration 1) number of work orders saved by combining multiple deliveries and 2) time saved in creating, transferring and finishing one work order versus 4-10 work orders.

For those records centers who have rotational accounts, the easiest way to track weekly/monthly rotations is by utilizing the chart feature of the

Corporate Keeper®. Appropriate information can be preset into the program for weekly/monthly rotations. Charts can be prepared ahead of time and distributed to the drivers on an applicable weekly/monthly basis. This newsletter will provide you with direction on how to complete, utilize and finish the charted work orders. The letters in parentheses indicate letters to be keyed off the Main Menu.

Add a New Chart Default (C-W-A):

- 1) Enter customer/department number
- 2) Weekly/Monthly(i.e., a Weekly chart could be for Monday through Friday and a Monthly chart could be for EACH Thursday)
- 3) Select the appropriate day(s)
- 4) Rotate code
- 5) Refile code
- 6) Delivery code
- 7) Any additional codes
- 8) Instructions for the rotation
- 9) Arrow down to OK and <Enter>.

Edit a Chart Default(C-W-B):

- 1) Key in the customer/department number
- 2) Select the appropriate chart<Enter>
- 3) Make any appropriate changes and arrow down to OK<Enter>

Delete a Preset Chart (C-W-B):

- 1) Key in the customer/department number
- 2) Select the appropriate chart
- 3) Arrow down to DELETE and <Enter>