Project Roadmap- SMI only

This document outlines the steps necessary to ensure a successful implementation of the ShopFloorConnect software.

1. Complete the ShopFloorConnect Customer Workbook – *Customer*
   The workbook is a multi-tab Excel document that, when completed, provides Wintriss with the necessary information to correctly configure your ShopFloorConnect server and the controls that will be connected to ShopFloorConnect. It is important that the ShopFloorConnect Customer Workbook be filled out completely and accurately, as this will be the basis for the entire configuration of the server and the controls.

2. Select a server – *Customer*
   The ShopFloorConnect system requirements can be found at:

   http://shopfloorconnect.com/sfc/hardware.html

   You may use a real or virtual server. If you intend to use a virtual server, please contact Wintriss for additional specifications.

3. Configure the server – *Customer*
   Install the operating system and Microsoft SQL (Wintriss will install SQL Express if you do not provide your own copy of Microsoft SQL Server 2012). Create an admin account on the server (and provide Wintriss with the user name and password), and install your virus protection and/or firewall software. Wintriss will perform a remote installation when you provide a suitable remote access method (see step 5 below).

4. Order the ShopFloorConnect Machine Interfaces . – *Customer*
   Wintriss will configure the ShopFloorConnect machine Interfaces (SMIs) according to the information in the workbook.

5. Install and configure the ShopFloorConnect software – *Wintriss – Remote installations take several days and can be scheduled sooner and may require an IT person to be available to assist at the customer side.*
   Wintriss must have a suitable remote connection to the SFC server. Examples of suitable remote connections include site-to-site VPN, VPN client, or direct RDP – all with file transfer capability (contact Wintriss for more information). Web conferencing/support software products such as Webex, GoTo Meeting, etc. are not suitable.

6. Install the ShopFloorConnect Machine Interfaces (SMI) – *Customer*

   To enable communication with your machines, you must install and configure the SMIs. *Installation services are available through Wintriss or your local representative, and can be quoted separately.*

7. Connect the SMIs to your network - *Customer*

   You'll need to run Ethernet drops to each control, configure the IP addresses, and plug them in to the network. Ping each control to ensure that it is communicating properly. This step must be completed before the final commissioning can be scheduled.

8. Remote Access. – *Customer and Wintriss*

   We require remote access to the ShopFloorConnect server in order to perform the final commissioning. Continuing 'anytime' access, while not a requirement, enables us to better troubleshoot any future ShopFloorConnect issues.

9. Commissioning and training – *Customer and Wintriss*

   Your ShopFloorConnect purchase includes remote commissioning and training as outlined below.

   The commissioning process consists of logging in to the server and testing the communications with the controls on the machines, initiating and testing the report delivery process, and optimizing the settings in the data logger and OPC client software.

   A description of the various ShopFloorConnect training modules is included below. The training will be conducted via net-meeting (such as WebEx). The customer is encouraged to schedule each session, this ensures the availability of the personnel to be trained.

   We are committed to working with each customer to understand all aspects of ShopFloorConnect. We will attempt to schedule training at the customer's convenience; however we encourage each user to get trained shortly after implementation and configuration of ShopFloorConnect is complete.

   On-site commissioning and training is available for an additional cost. Contact the Wintriss factory for a quote. On-site costs will cover travel and expenses for one ShopFloorConnect expert for 3 to 5 days depending on individual needs.

10. Review and sign the maintenance agreement – *Customer*

    The first year's maintenance is included in the price of ShopFloorConnect. By signing and returning the Maintenance Agreement, we can ensure that you'll receive all of the latest ShopFloorConnect updates and features, and uninterrupted customer support.

Training Agenda

(We encourage a train the trainer program, we have found that this helps to maintain integrity of the program and emphasizes the company's commitment to SFC data collection efforts)

- Machine Operator Training - (Duration : 45 to 60 minutes)
  - *Content* – This presentation will demonstrate how to properly use the SMI's interactive dialog menus to report downtime reasons to ShopFloorConnect.
  - *Who Should Attend* – Machine operators responsible for reporting downtime to ShopFloorConnect

- Factory Viewer Basics - (Duration : 1 hour)
  - *Content* - This training provides an overview of the ShopFloorConnect Factory Viewer browser interface.
  - *Who Should Attend* – Anyone interested in real time factory floor information.

- ShopFloorConnect Reporting - (Duration : 2 hours)
  - *Content* - This in-depth training explains how to use the ShopFloorConnect reporting feature. Part one reviews available reports and what each report has to offer as well as how to pull ad hoc reports. Part two goes in depth into the SFC report manager and includes how to configure, modify, save, and set up delivery for the various reports available in ShopFloorConnect.
  - *Who Should Attend* – Anyone that will be viewing or configuring ShopFloorConnect reports.

- Using the ShopFloorConnect Scheduling Module - (Duration : 30 to 45 minutes)
  - *Content* - This session will demonstrate how schedules are setup and are managed by the SMI on the shop floor. We will mock schedule and run through real life scenarios so that the user will understand what is necessary to schedule within SFC and what the operator on the shop floor sees when the schedule is received.
  - *Who Should Attend* – Personnel responsible for scheduling jobs in the machines.

- ShopFloorConnect Administrator Training - (Duration: 1 to 2 hours; broken up in several sessions)
  - *Content* - This training session will be a comprehensive demonstration on how to work within the administrative platform of SFC. We will review how to add users, set permissions, modify the production calendar, importing of product information, create sites and areas, and configure the downtime codes. You will learn how to add new machines, modify existing machines and adapt to the changes that occur on the shop floor
  - *Who Should Attend* – Those that will be the champions of ShopFloorConnect. Anyone responsible for implementing the project or wants a hands on view of how to manage SFC.