Production Schedule: how-to guide

IntraSync
November 21, 2026

Production Schedule plans the plant's work: it places each work order's operations on your work centers over the planning horizon, checks them against capacity, and publishes the plan for the shop floor. The floor then works from it day by day and work center by work center.

> *Written for: Production planner, Plant manager, Shop floor supervisor, Administrator.*

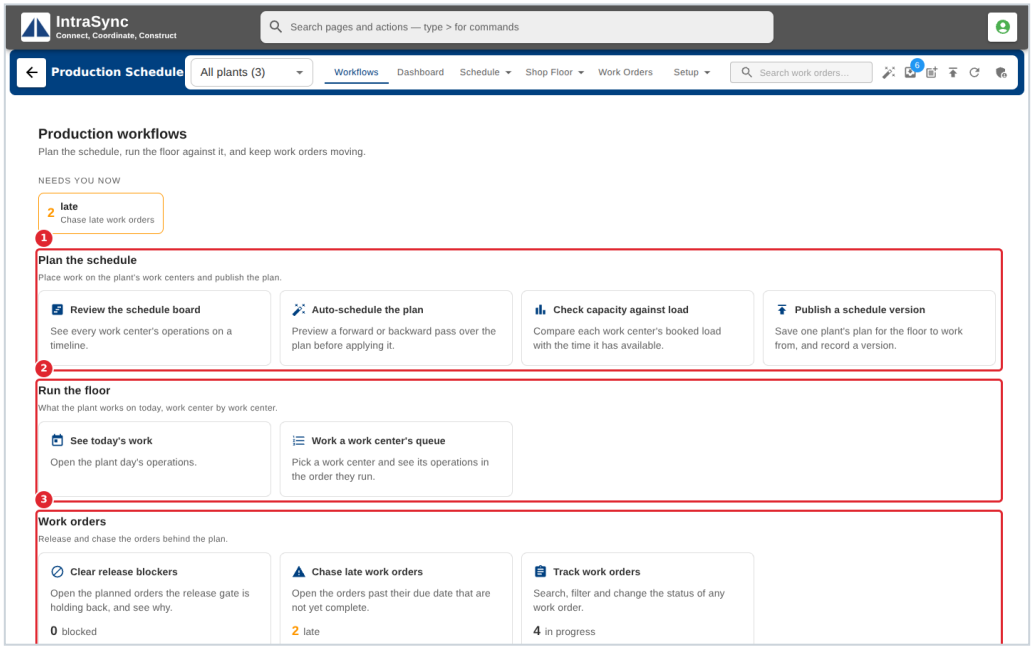
> *In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.*

In this guide

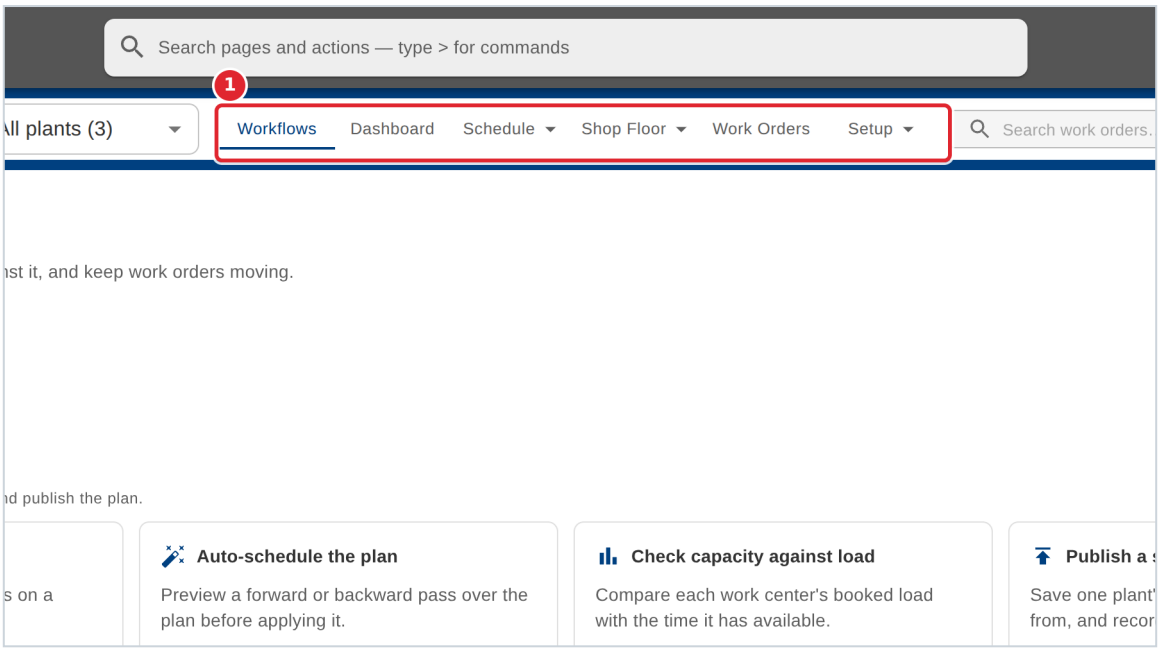
- 1. Find your way around Production Schedule
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- 20. Check working calendars
- 21. Review work centers
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- 23. Check settings and reload data (administrators)

1. Find your way around Production Schedule

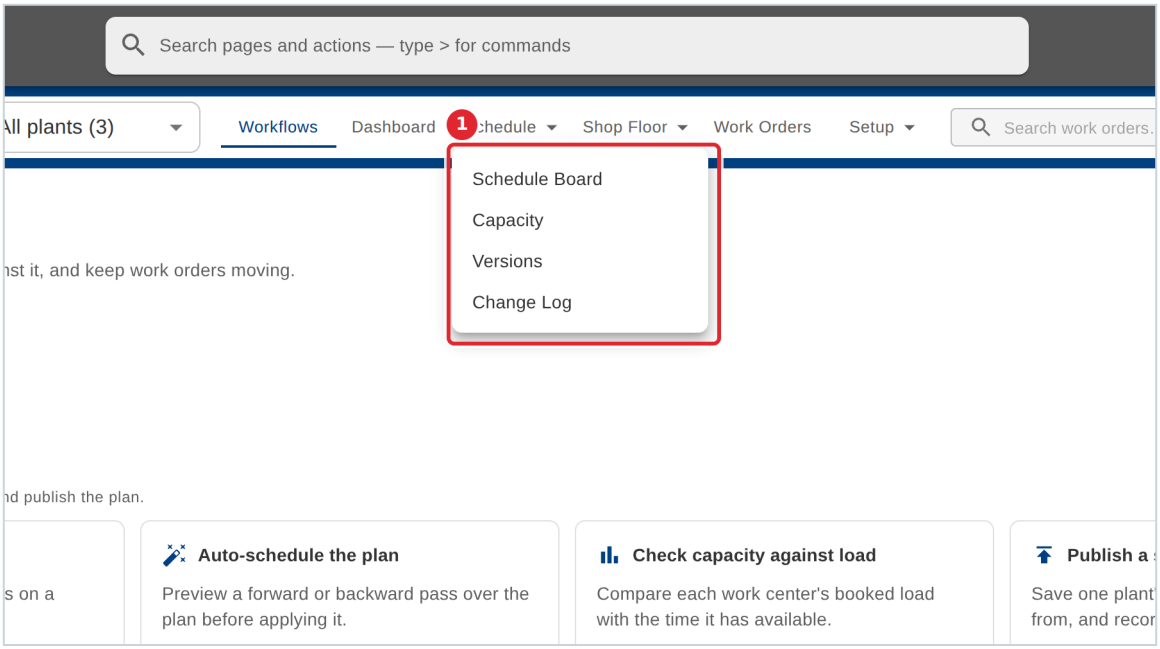
Know where each part of the schedule lives before you start planning.



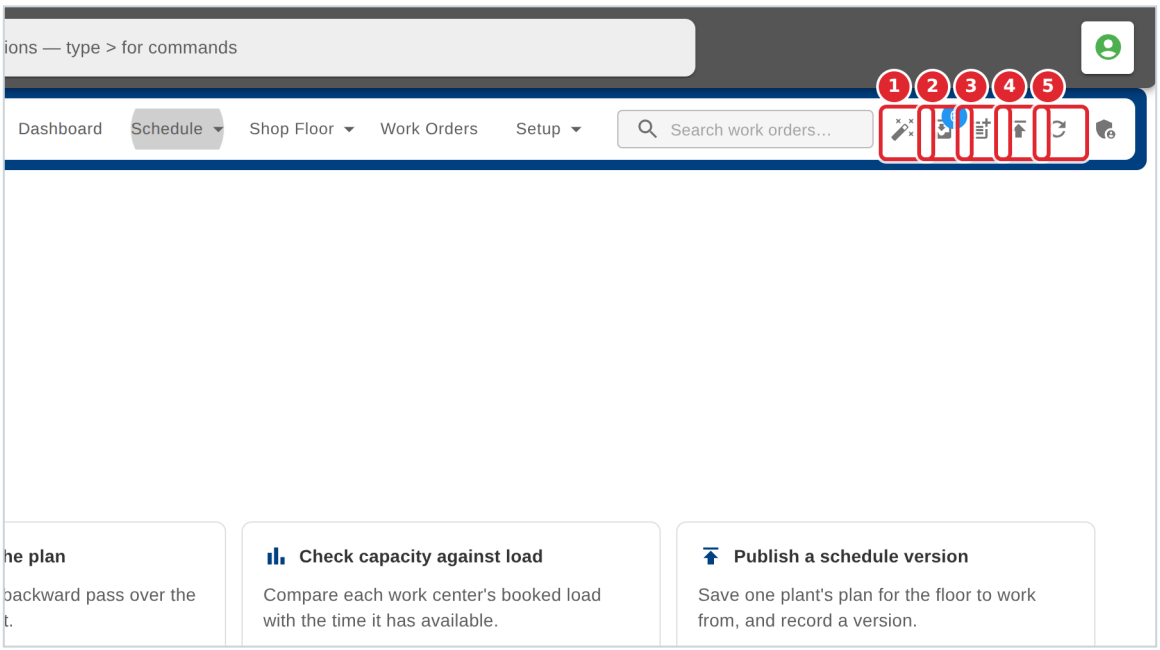
Step 1. Open Production Schedule. It opens on Workflows, grouped by the job you came to do.



Step 2. Use the menu across the top to move between areas.



Step 3. Select Schedule, Shop Floor or Setup to open its list, then pick a screen.



Step 4. The buttons at the right run the planner's actions: Auto-schedule, Convert sales-order lines, Schedule a custom item, Publish and Refresh.

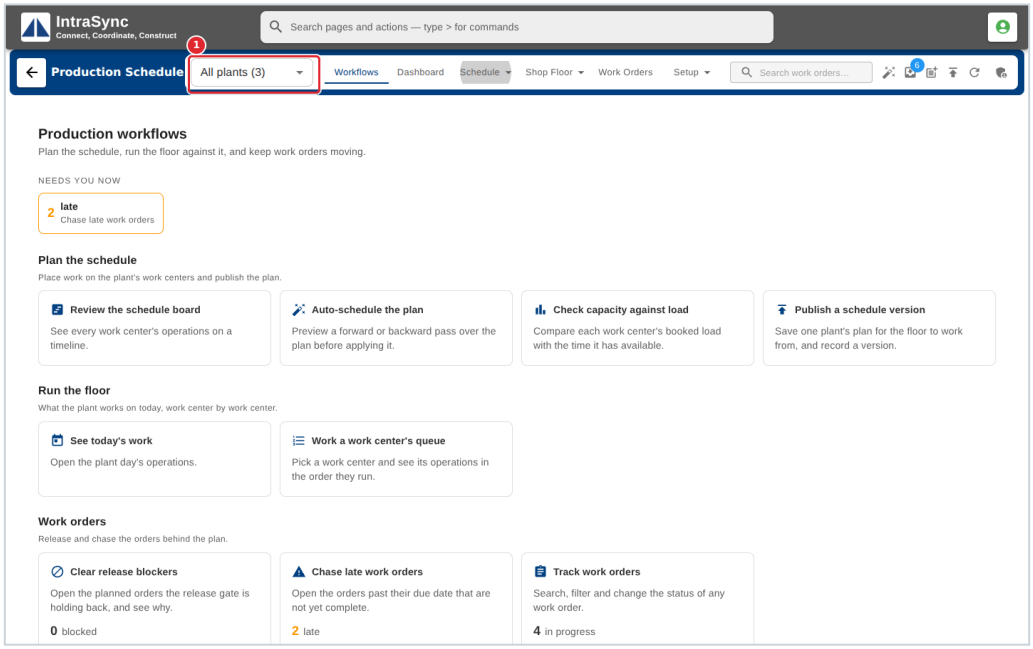
Tips:

- Each card on Workflows opens the screen for that job, so it is a quick way in when you are not sure where something is.
- Schedule holds the Schedule Board, Capacity, Versions and the Change Log. Shop Floor holds Today and the Run Queue. Setup holds Calendars, Work Centers and Routings.
- Rest the pointer on a header button to see what it does.

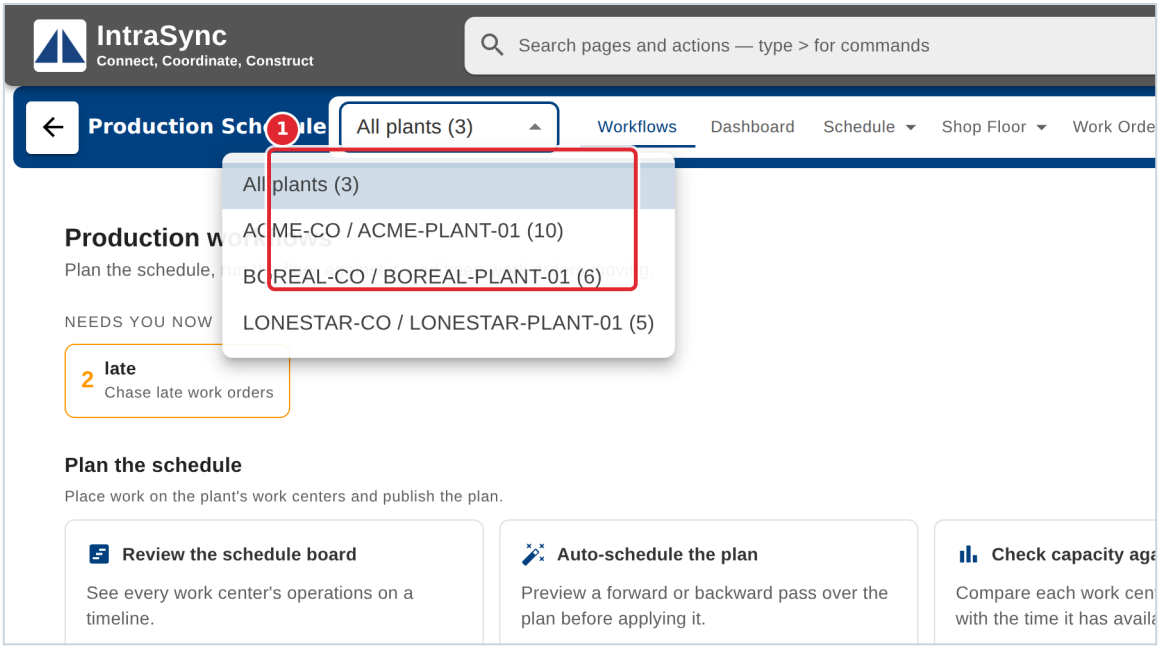
This is shown in the Production Schedule video at 0:03.

2. Choose which plant to work on

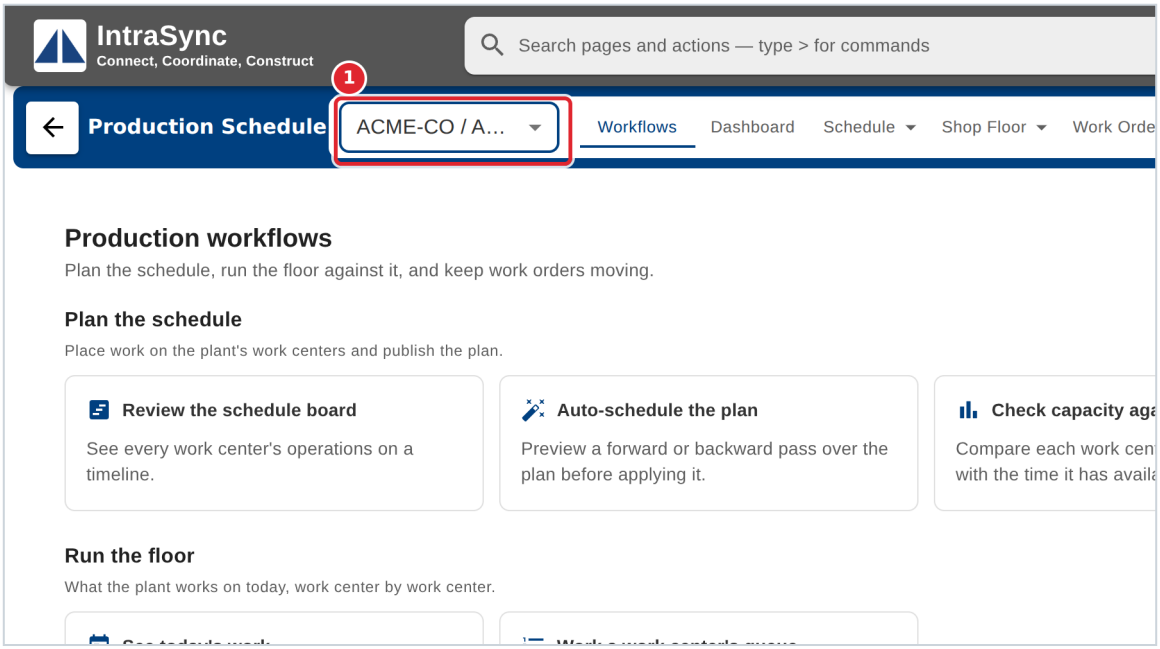
Plan one plant at a time, or look across every plant together.



Step 1. Find the plant selector at the left of the header.



Step 2. Select the plant you want to plan, or All plants to see every plant together.



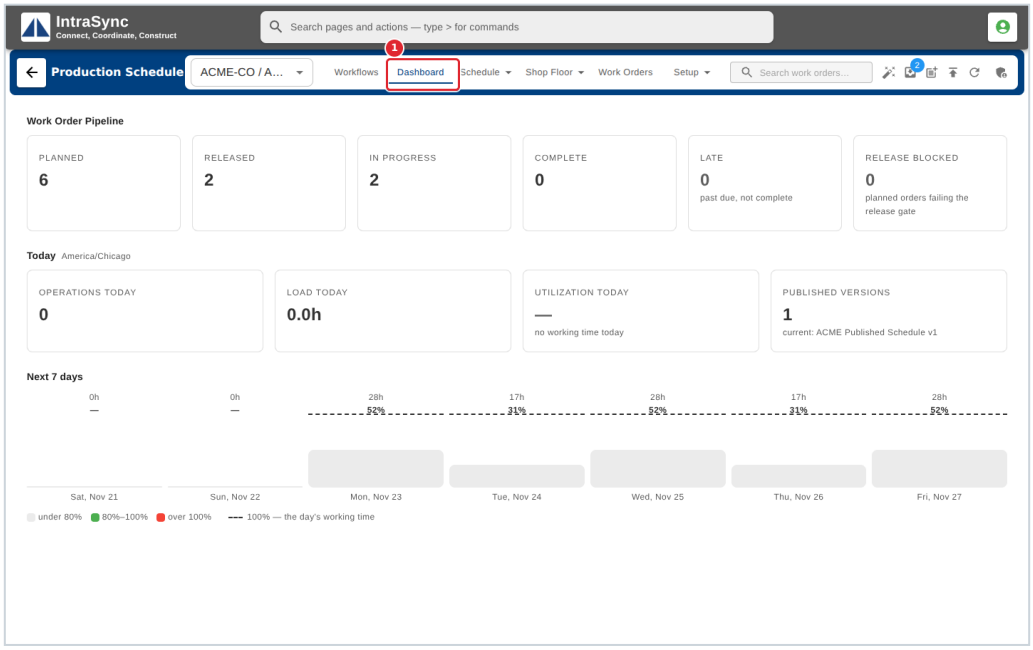
Step 3. Every screen now shows that plant only.

Tips:

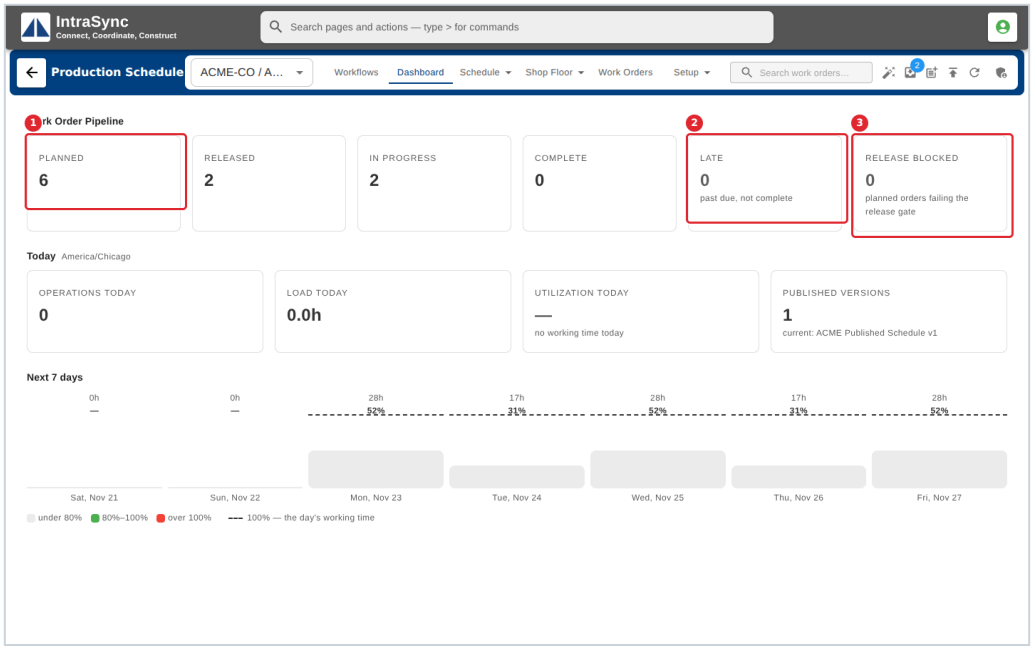
- Each plant in the list shows how many work orders it has.
- Publishing a schedule version needs one plant chosen: a version belongs to exactly one plant.

3. Check the plan at a glance on the Dashboard

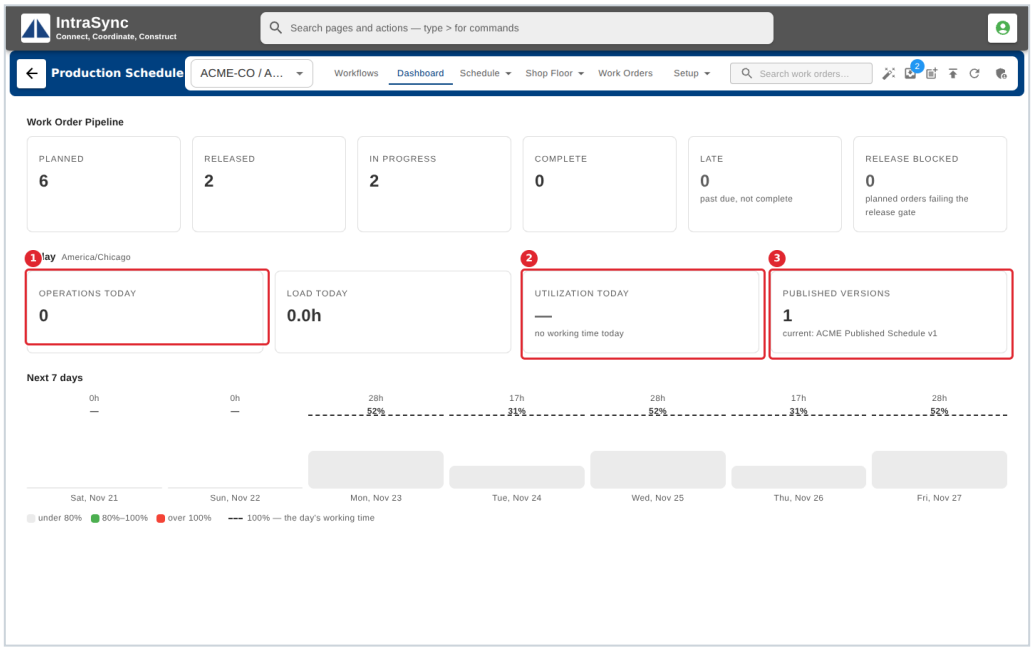
See where the work orders stand, what today holds and how loaded the coming week is, without opening each screen.



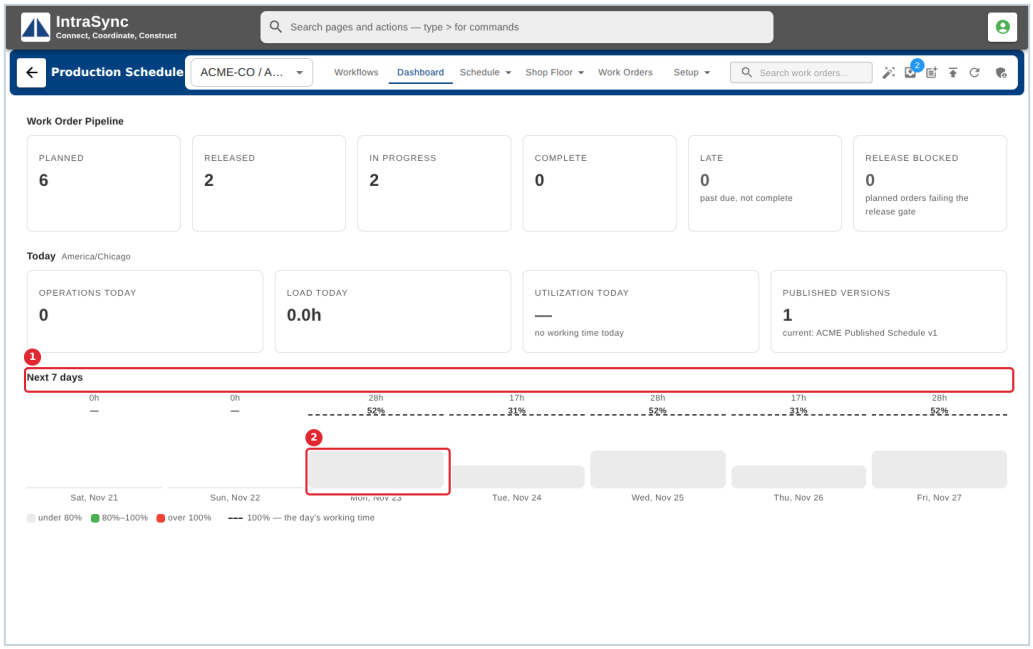
Step 1. Select Dashboard.



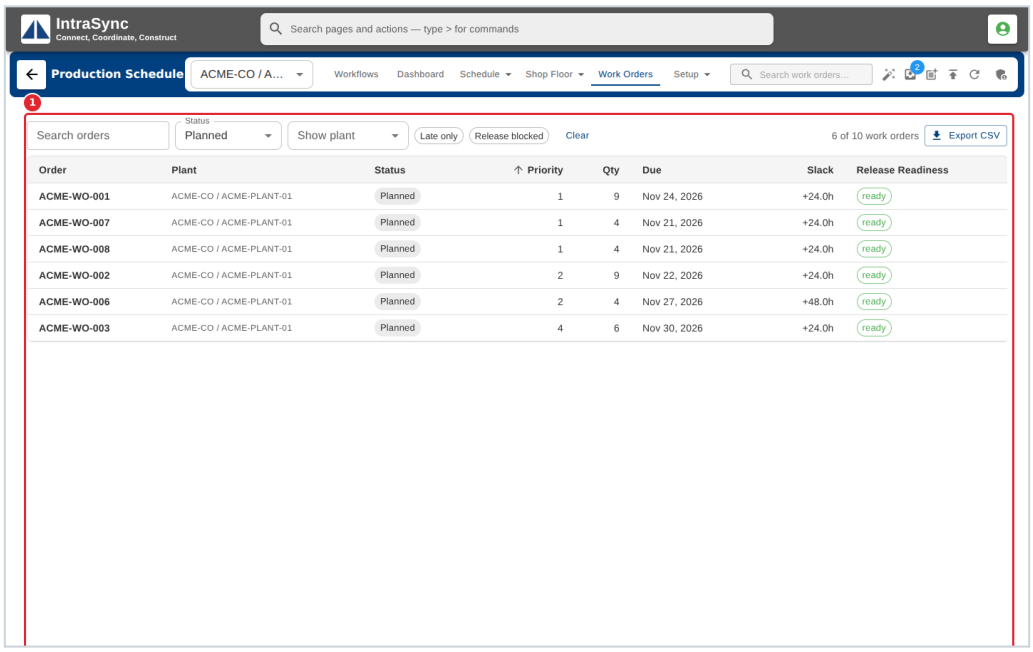
Step 2. Read the work order pipeline: how many orders are planned, released, in progress, complete, late or blocked.



Step 3. Read today's operations, load and utilization, and the current published version.



Step 4. Read the next seven days: the hours booked each day against its working time.



Step 5. Select a pipeline card to open Work Orders with that filter applied.

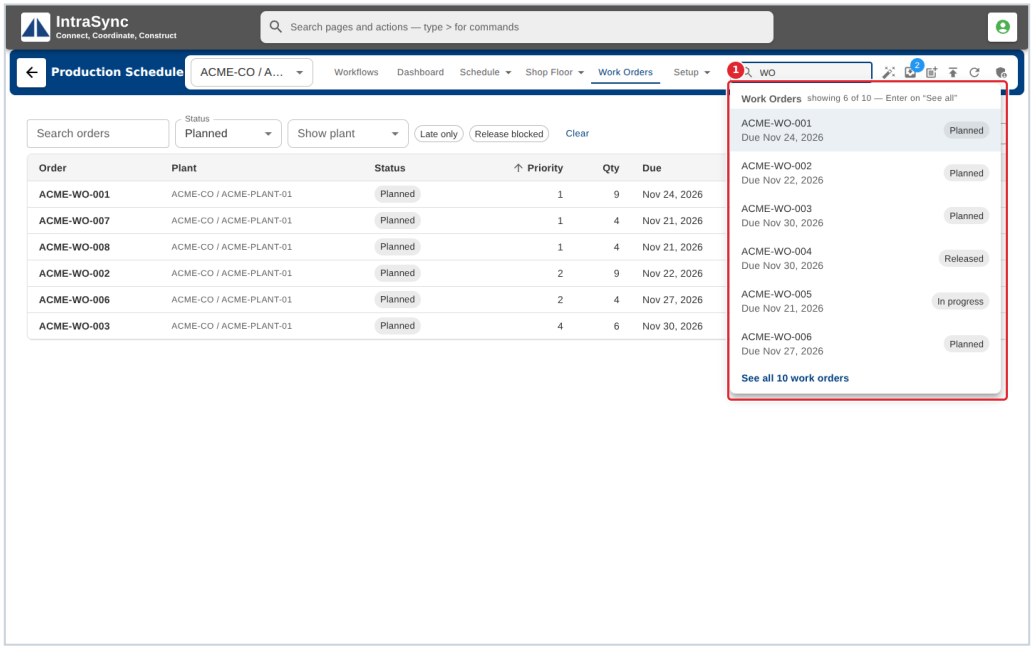
Tips:

- Late means past its due date and not complete. Release Blocked counts planned orders that fail the release gate.
- The week chart colours each day under 80%, 80% to 100%, or over 100% of the day's working time.
- Days with no working time, such as weekends on a weekday calendar, show a dash instead of a percentage.

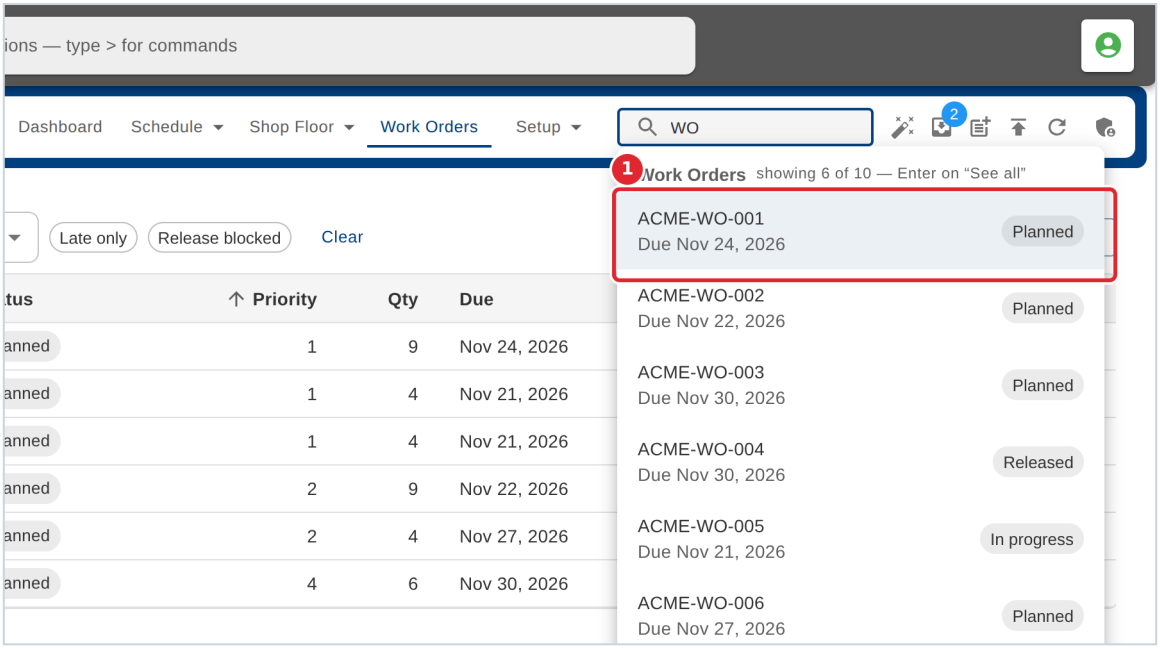
This is shown in the Production Schedule video at 0:07.

4. Find a work order, work center, routing or version

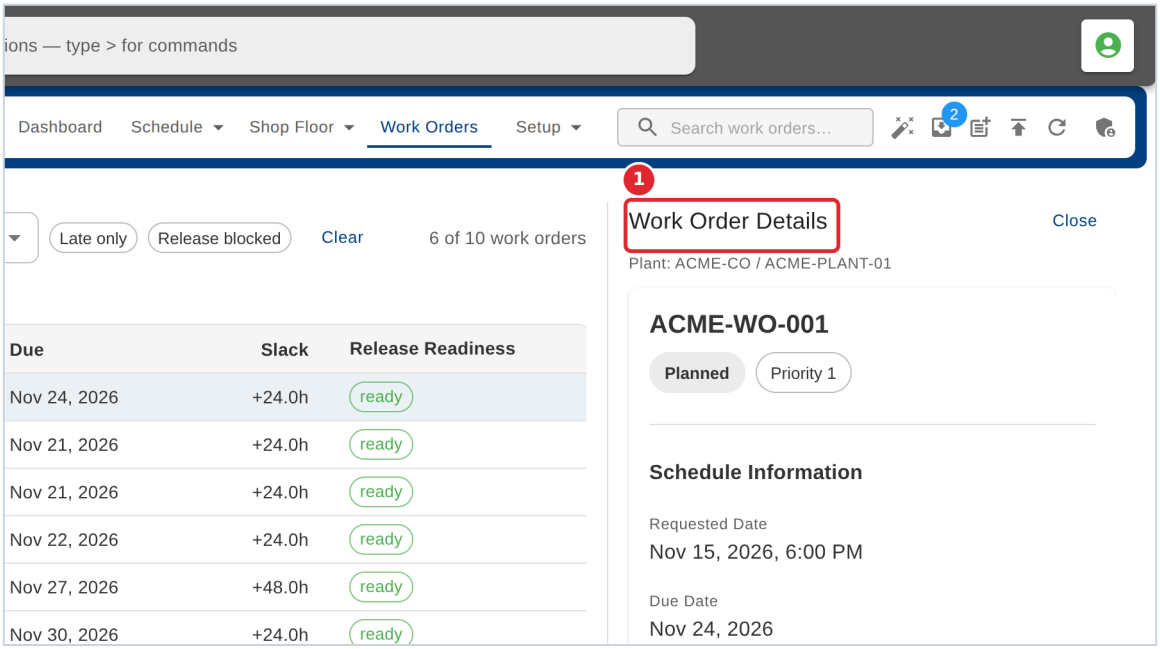
Jump straight to the record you need from any screen.



Step 1. Type part of a work order number, work center, routing or version name in the search box.



Step 2. Select a result to open it.



Step 3. A work order opens on Work Orders with its details at the right.

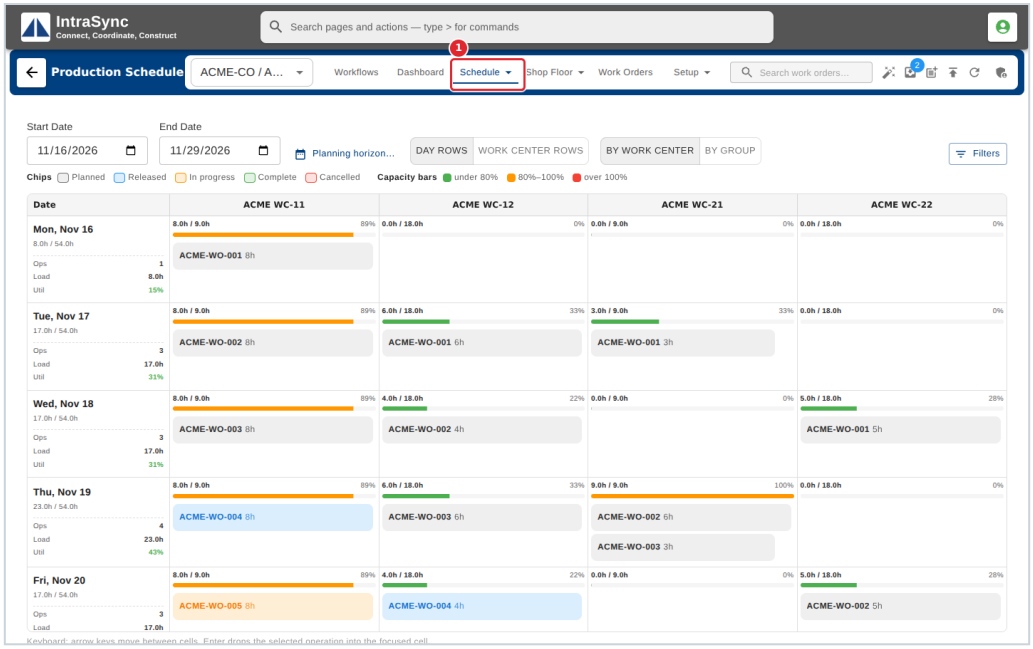
Tips:

– The list shows the first matches. Press Enter or select See all to see every matching work order.

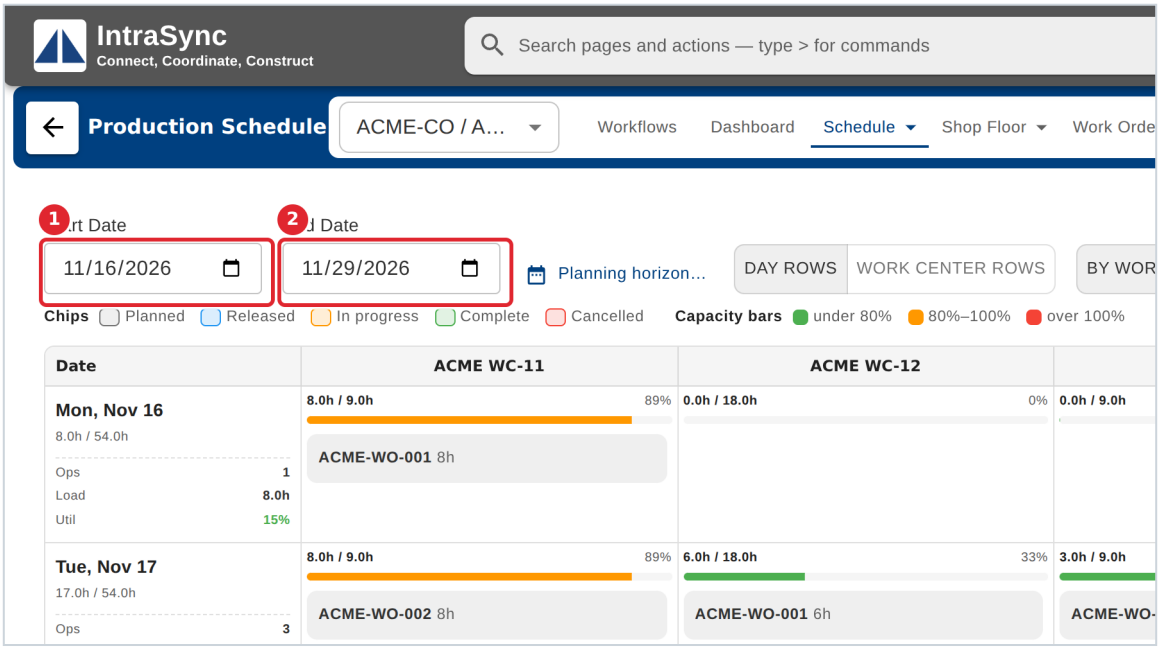
This is shown in the Production Schedule video at 1:15.

5. Read the Schedule Board

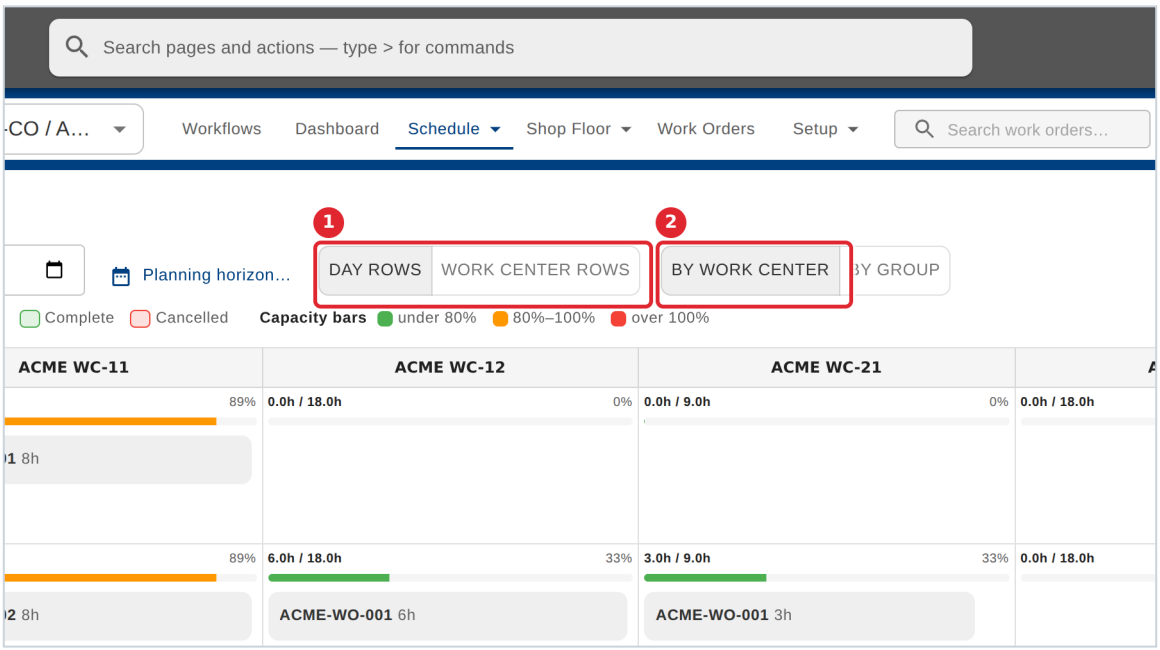
See every operation placed on its work center, day by day, and how full each work center is.



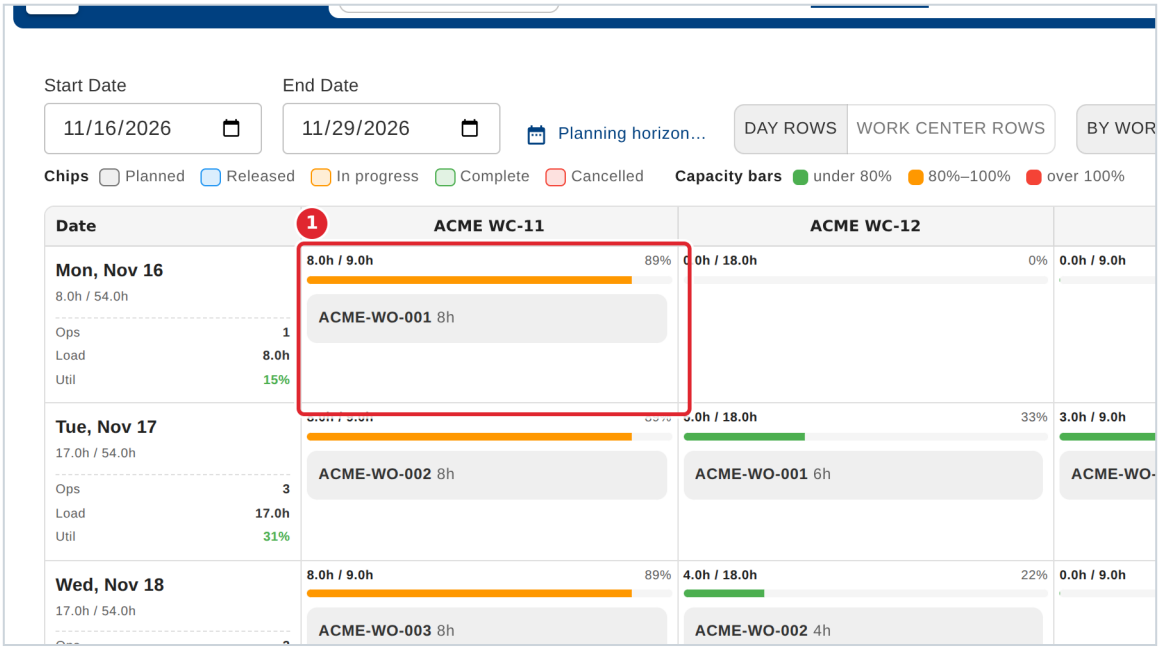
Step 1. Select Schedule > Schedule Board.



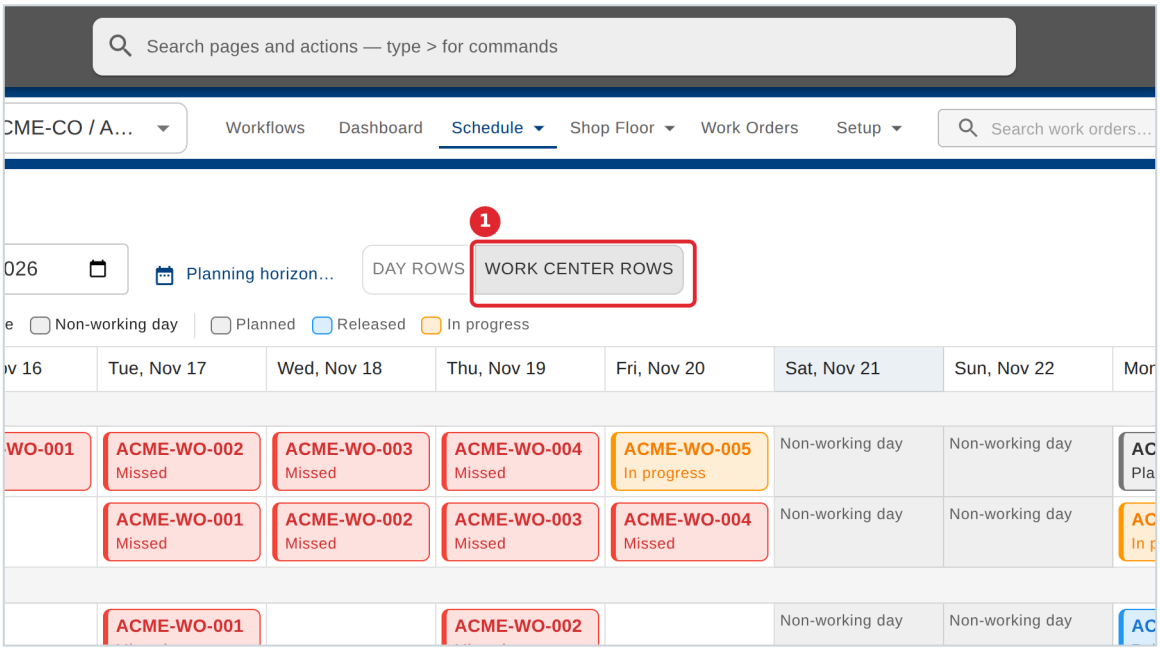
Step 2. Set the dates to show with Start Date and End Date.



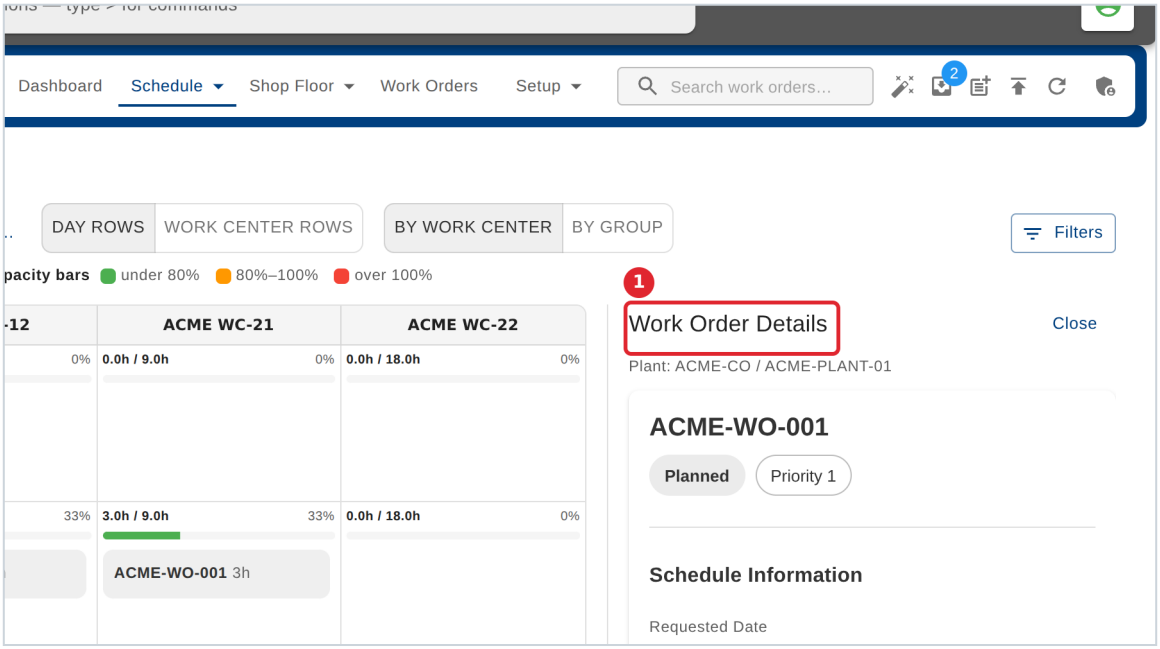
Step 3. Choose the layout: one row per day or one row per work center, and columns by work center or by group.



Step 4. Read each cell: the hours booked against the work center's time, and a chip for each operation, coloured by status.



Step 5. With Work center rows, each work center is a row and the days run across.



Step 6. Select an operation chip to open its work order's details.

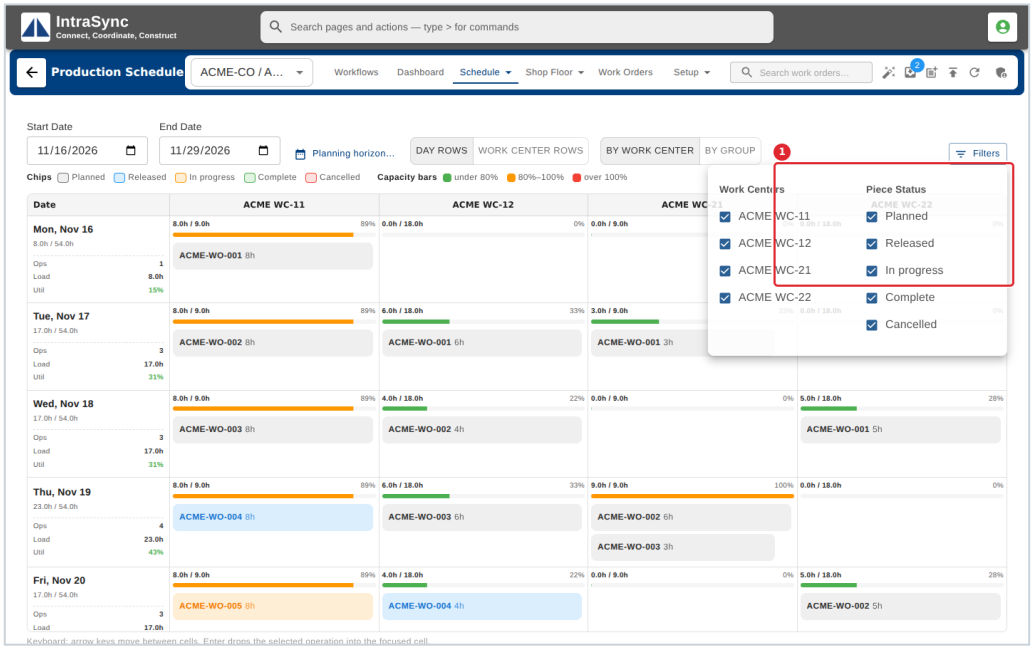
Tips:

- Days are plant days in the plant's own time zone.
- A planned operation whose day has passed shows as Missed.
- The legend above the board shows what each chip colour and capacity-bar colour means.
- You can also move around the board with the arrow keys.

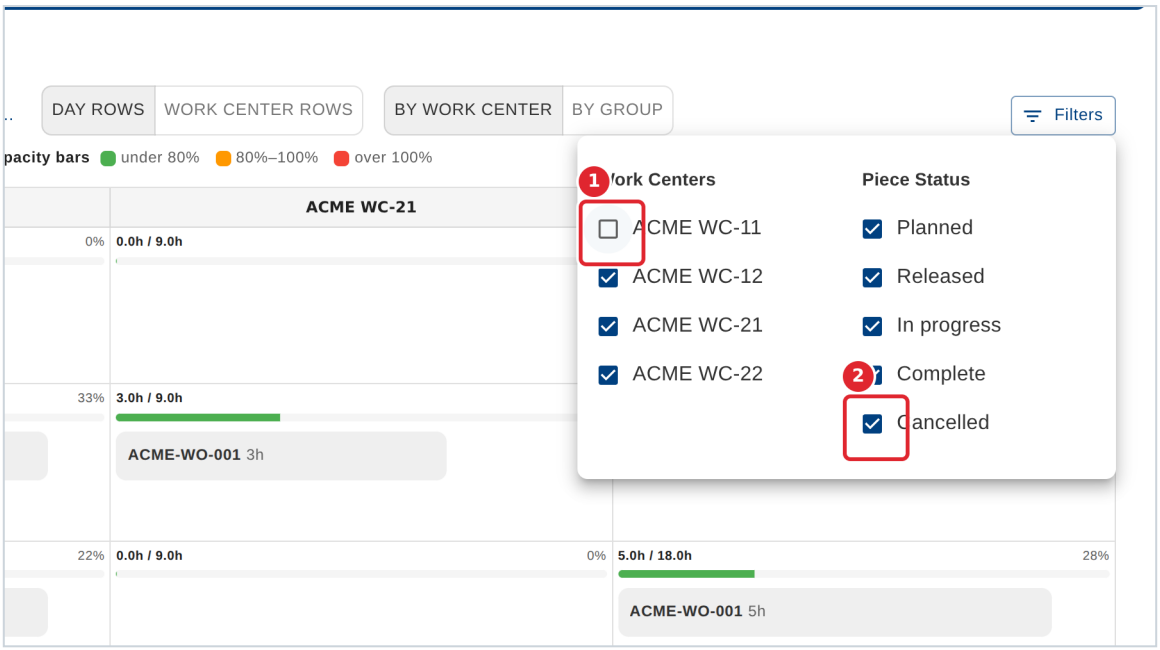
This is shown in the Production Schedule video at 0:11.

6. Show only some work centers or statuses on the board

Cut the board down to the work centers and statuses you are working on.



Step 1. Select Filters.



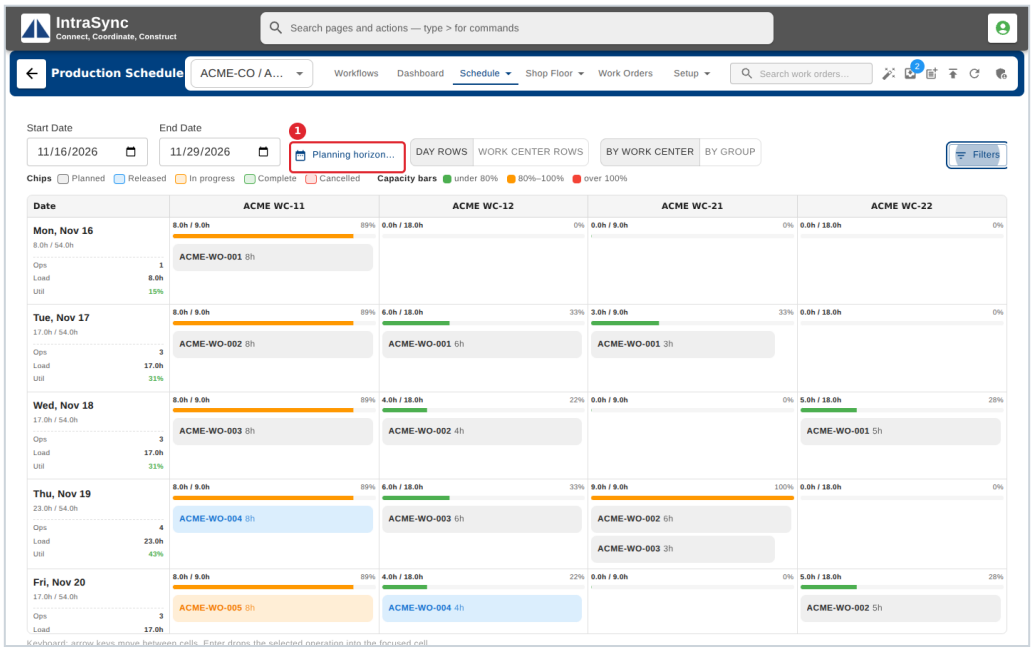
Step 2. Clear a work center or a status to hide it from the board. Tick it again to bring it back.

7. Set the planning horizon

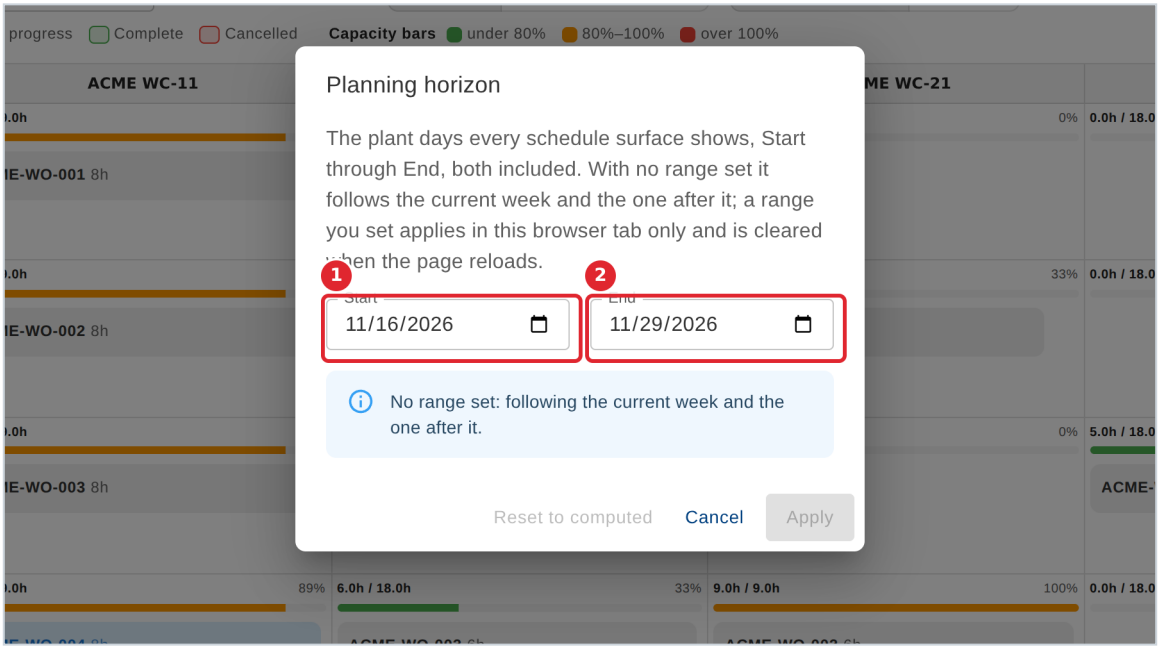
Choose the range of plant days that every schedule screen shows and that auto-schedule plans over.

Before you start:

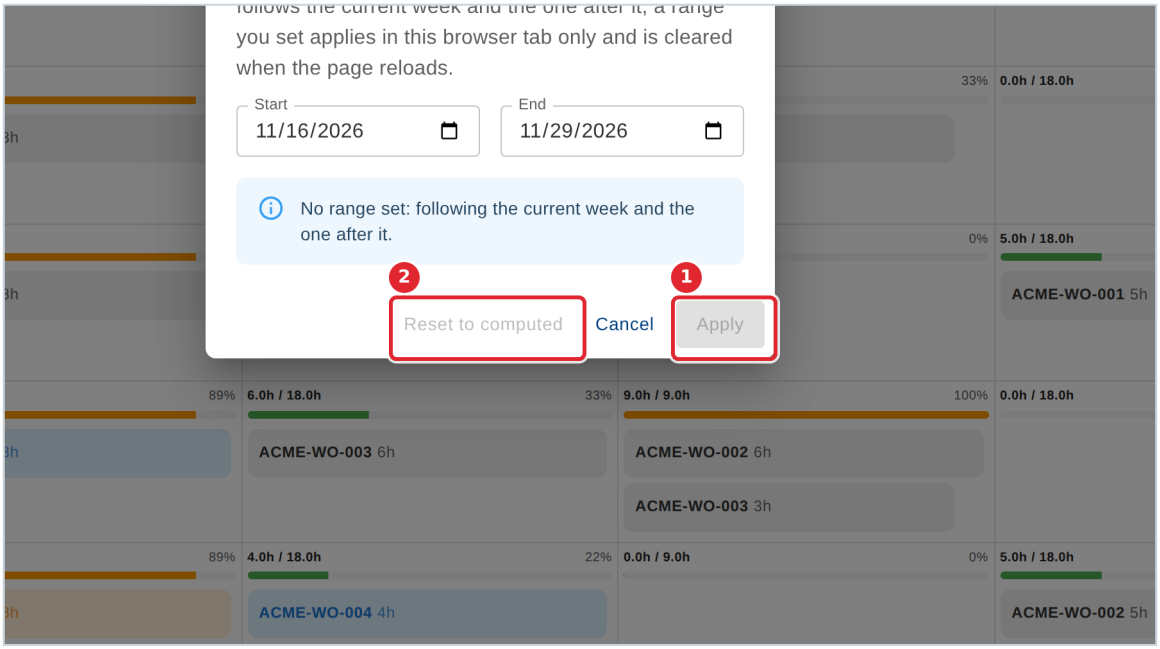
– Open Schedule > Schedule Board.



Step 1. On the Schedule Board, select Planning horizon.



Step 2. Enter the Start and End days to plan. Both days are included.



Step 3. Select Apply. To go back to the current week and the next, select Reset to computed.

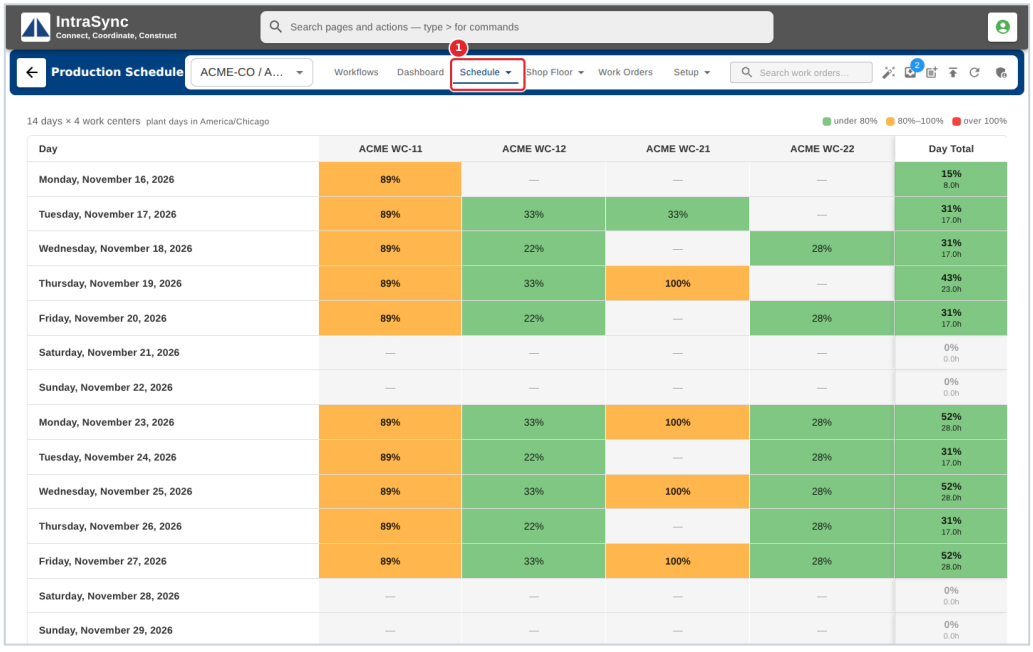
Tips:

- With no range set, the horizon follows the current week and the one after it.
- A range you set applies in this browser tab only and is cleared when the page reloads.

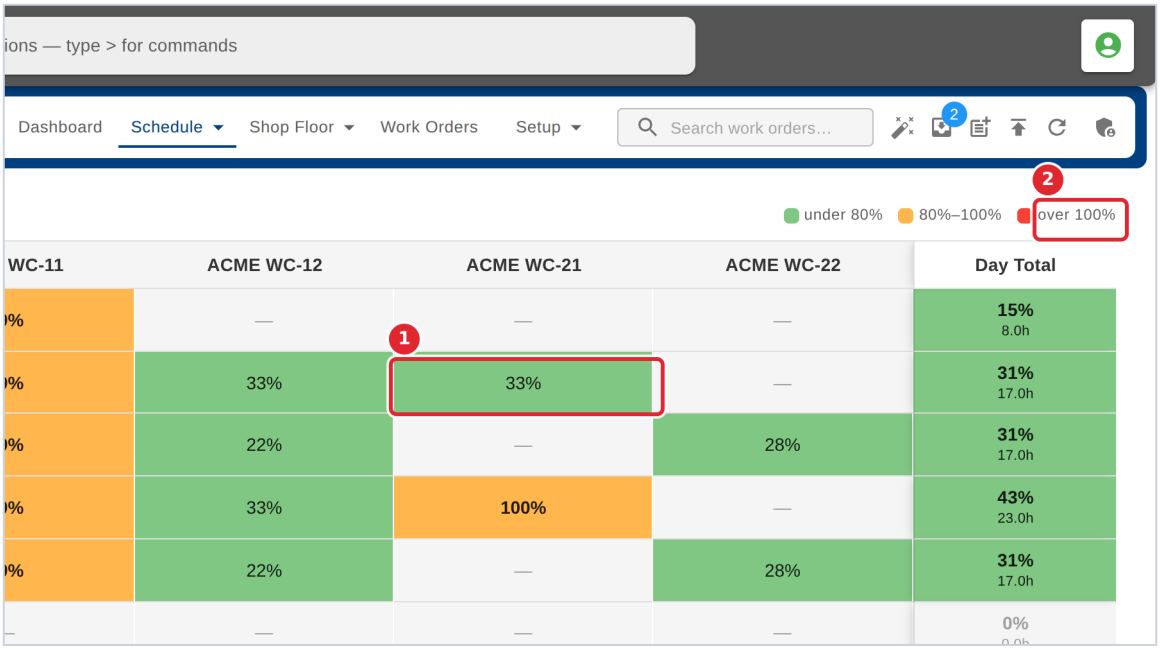
This is shown in the Production Schedule video at 1:53.

8. Check capacity against load

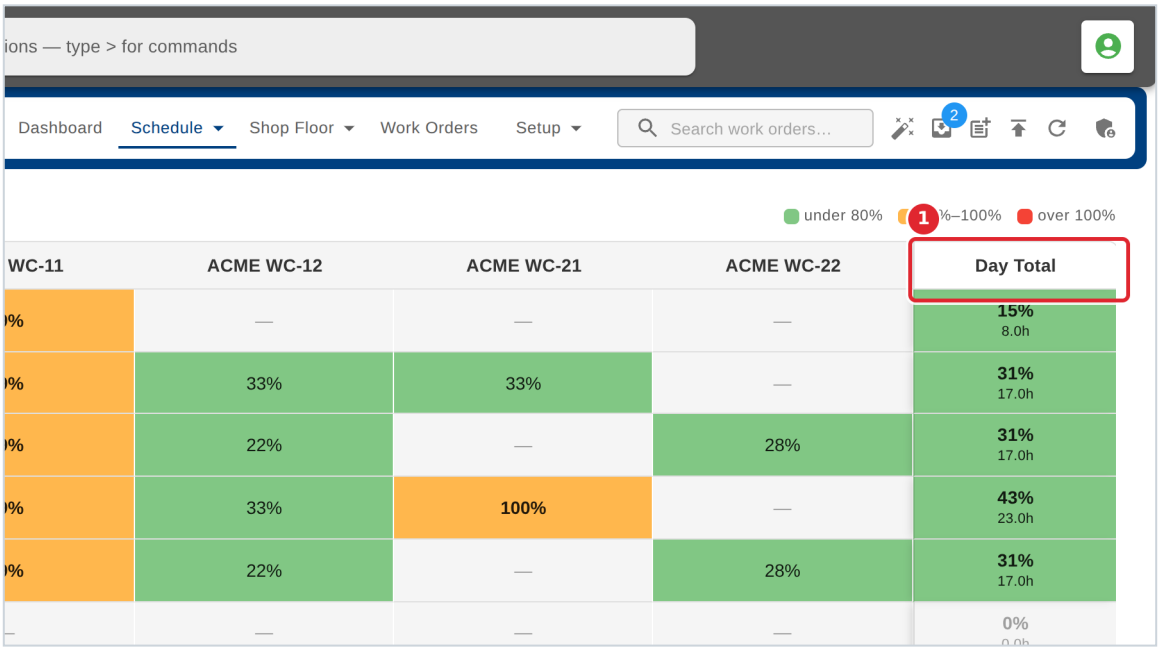
Find the days and work centers that are overbooked or have room before you move work.



Step 1. Select Schedule > Capacity.



Step 2. Read each work center's load for each day as a share of its working time. The colours mark under 80%, 80% to 100%, and over 100%.



Step 3. Read the Day Total column for the whole plant.

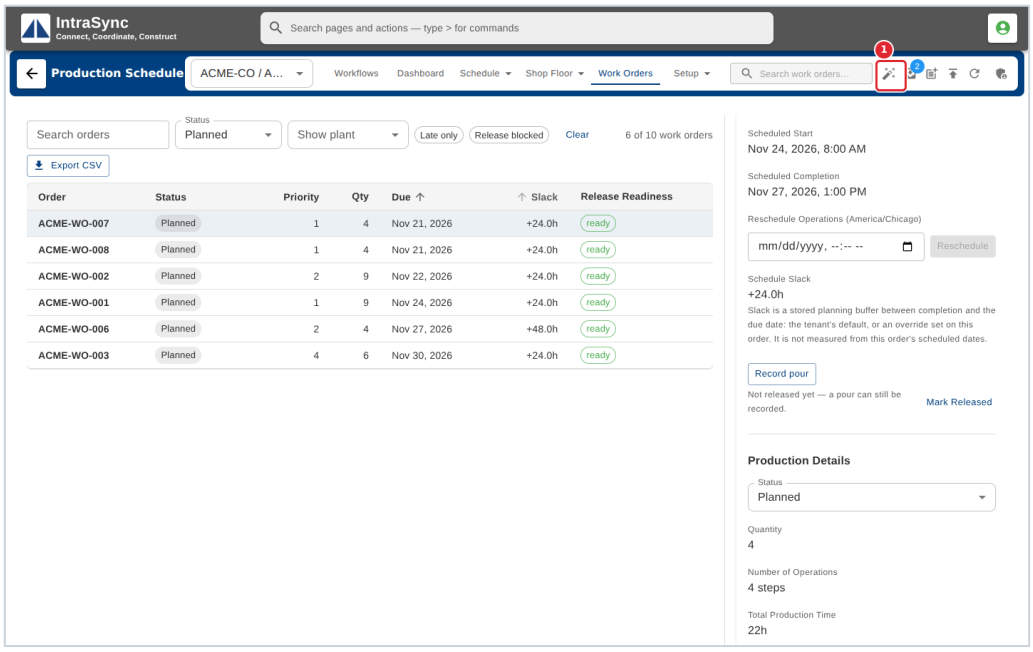
This is shown in the Production Schedule video at 0:20.

9. Auto-schedule the plan

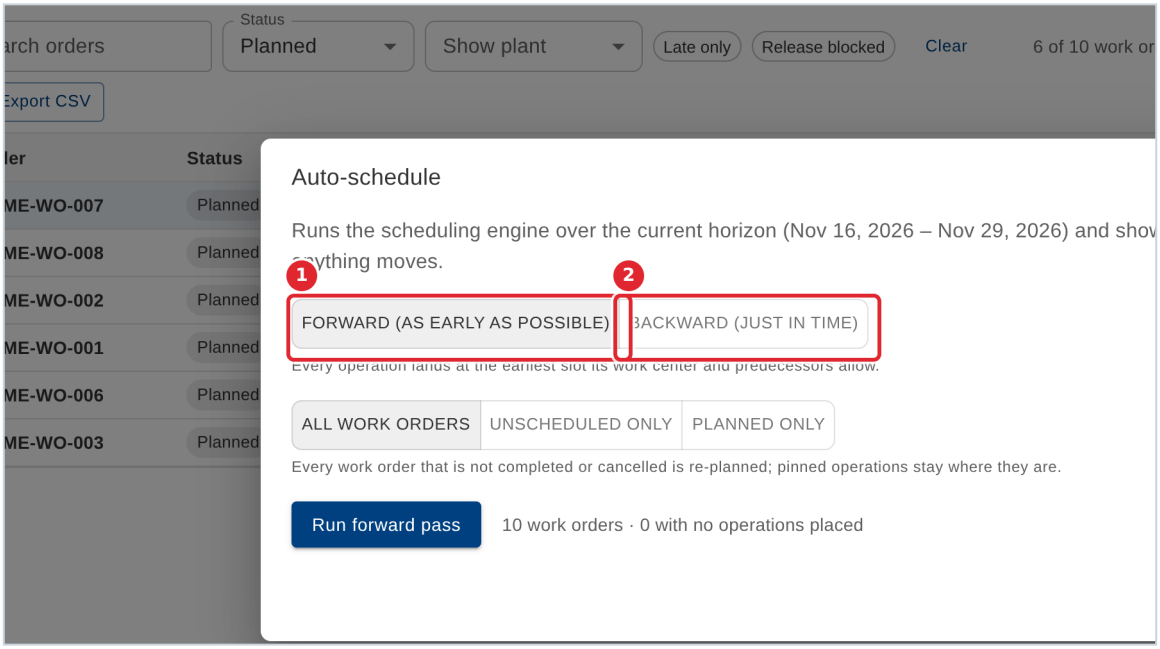
Let the scheduling engine place the work over the planning horizon, and check the result before anything moves.

Before you start:

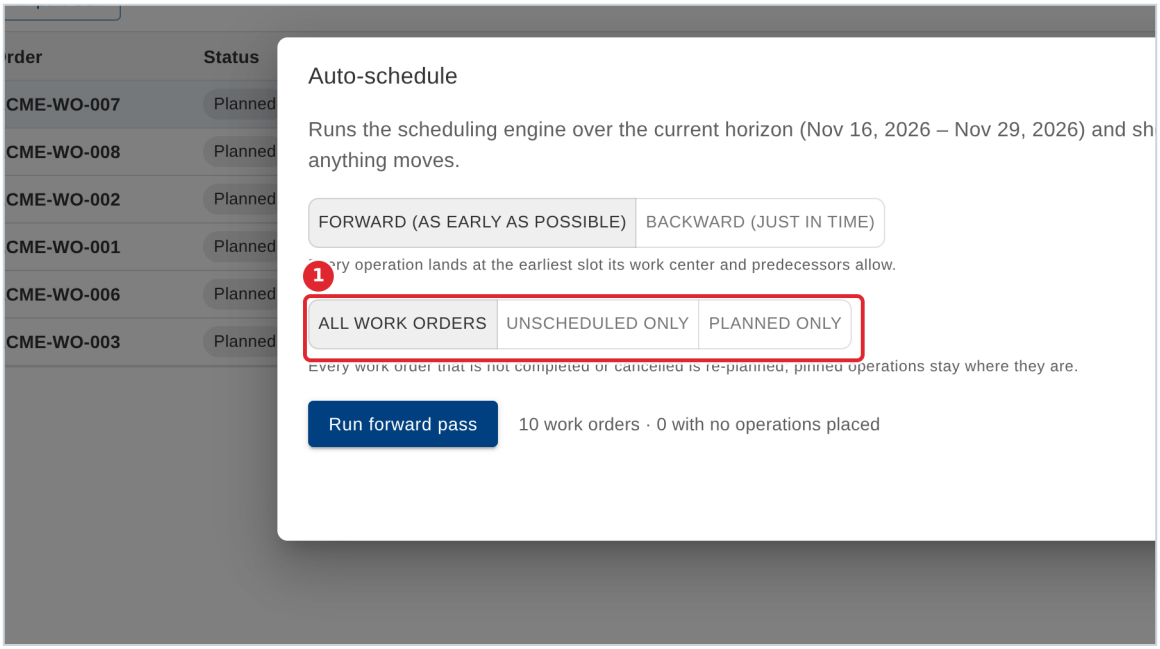
– Choose the plant and set the planning horizon you want to schedule.



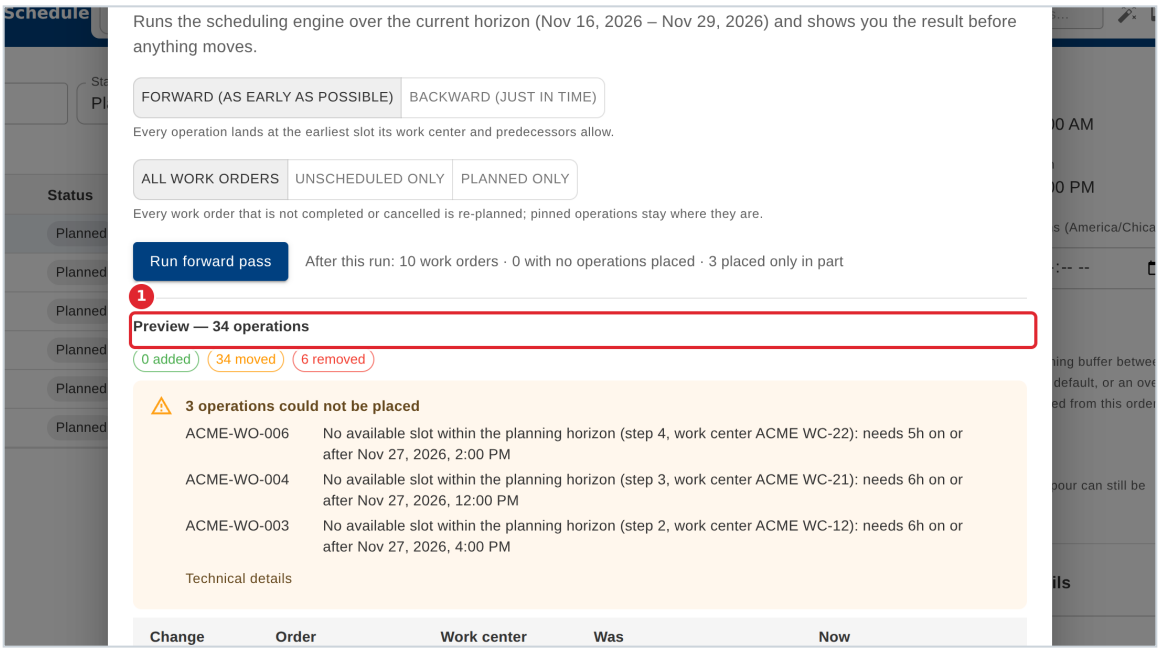
Step 1. Select Auto-schedule in the header.



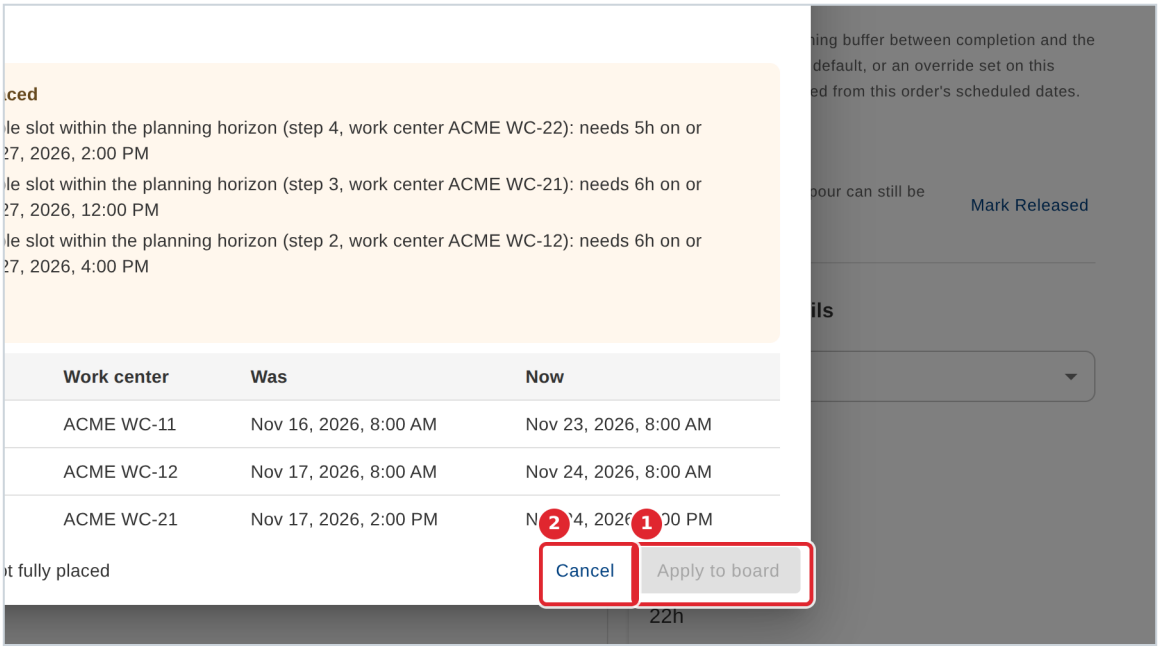
Step 2. Choose Forward to place work as early as possible, or Backward to finish it just in time.



Step 3. Choose which work orders to schedule: all, unscheduled only, or planned only.



Step 4. Select Run forward pass. Read the preview: each operation that would move, and any that could not be placed and why.



Step 5. Select Apply to board to place the work, or Cancel to change nothing.

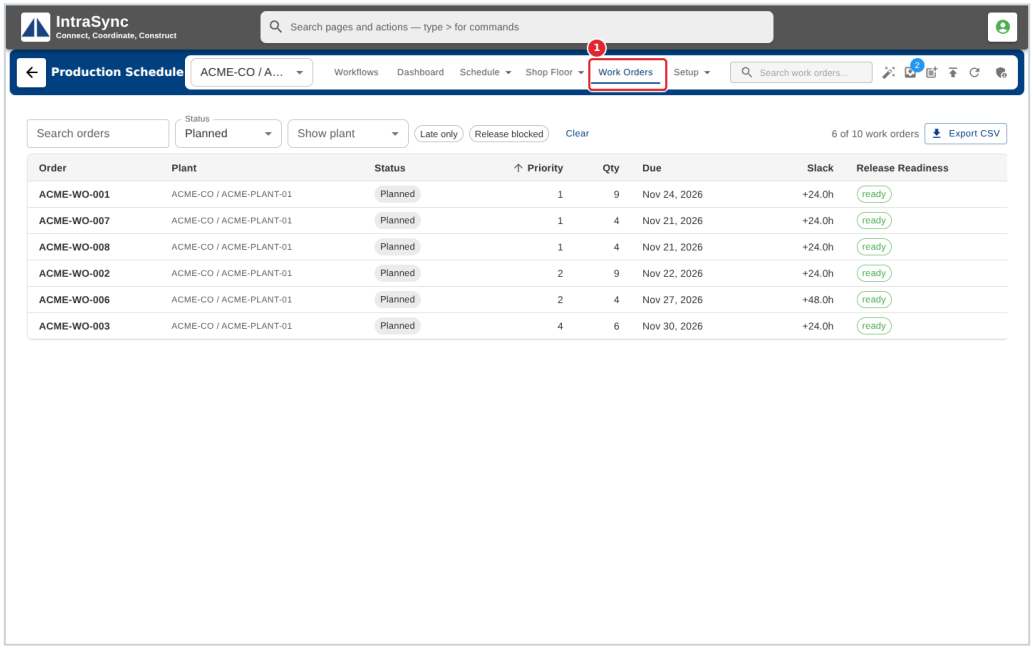
Tips:

- Nothing moves until you select Apply to board.
- Pinned operations stay where they are. Completed and cancelled work orders are not re-planned.
- An operation that could not be placed says why, such as no free slot on its work center within the horizon. Widen the horizon or free up capacity, then run the pass again.
- If some work orders are not fully placed, Apply to board stays unavailable unless you tick Apply anyway.

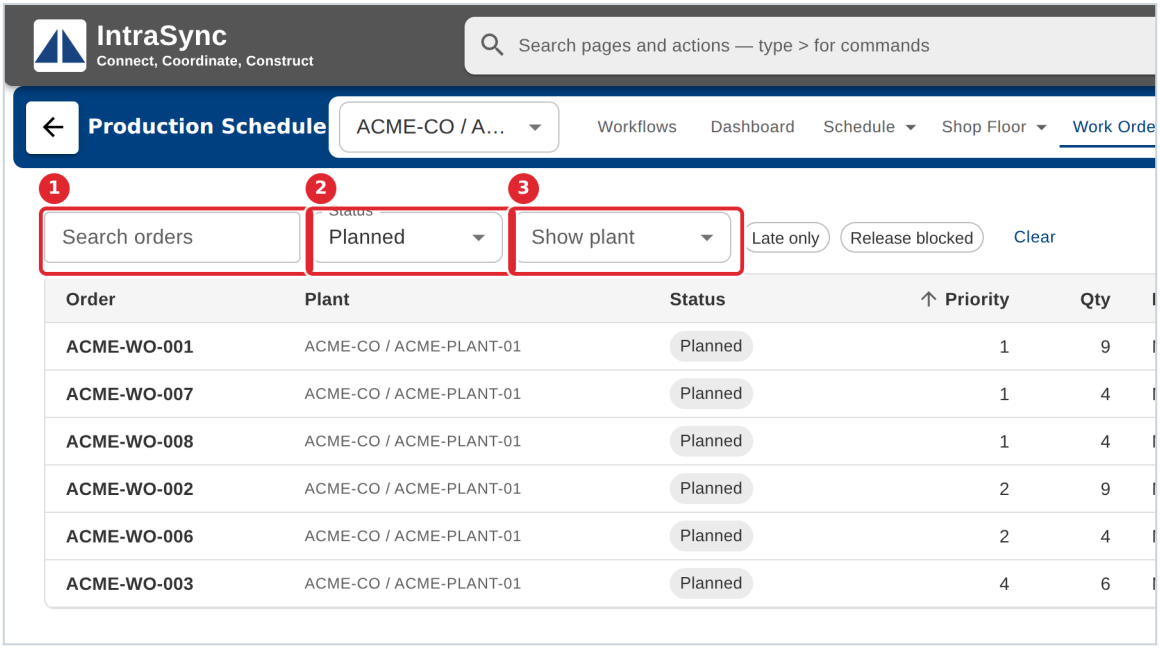
This is shown in the Production Schedule video at 1:26.

10. Find and filter work orders

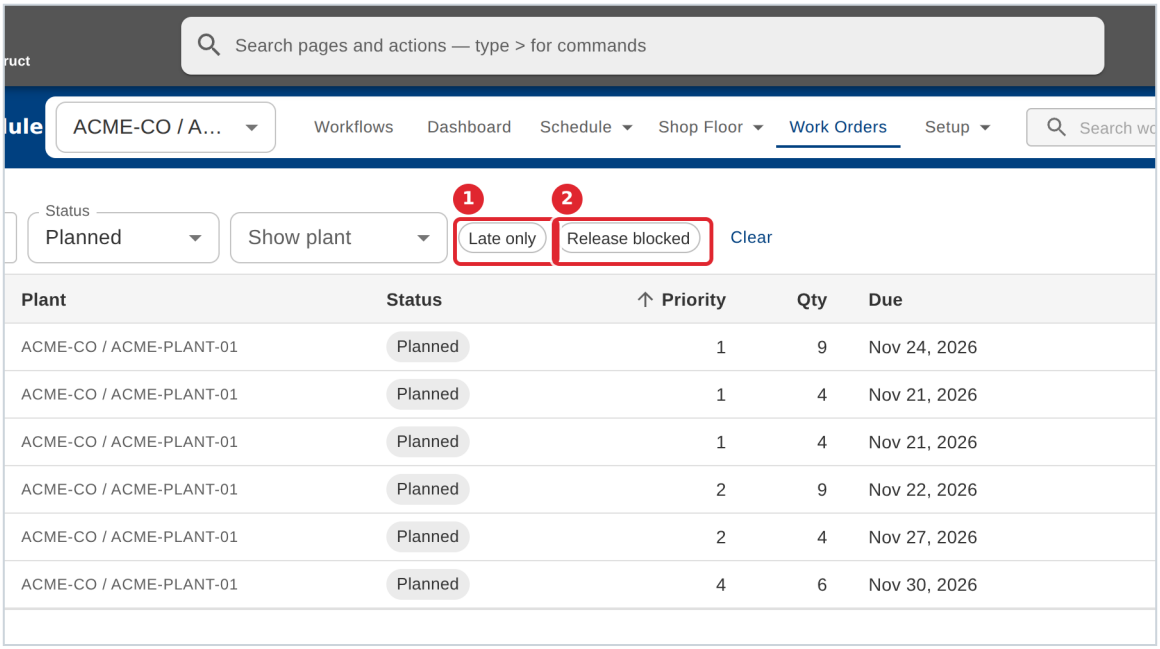
Find the orders you need to release, chase or check.



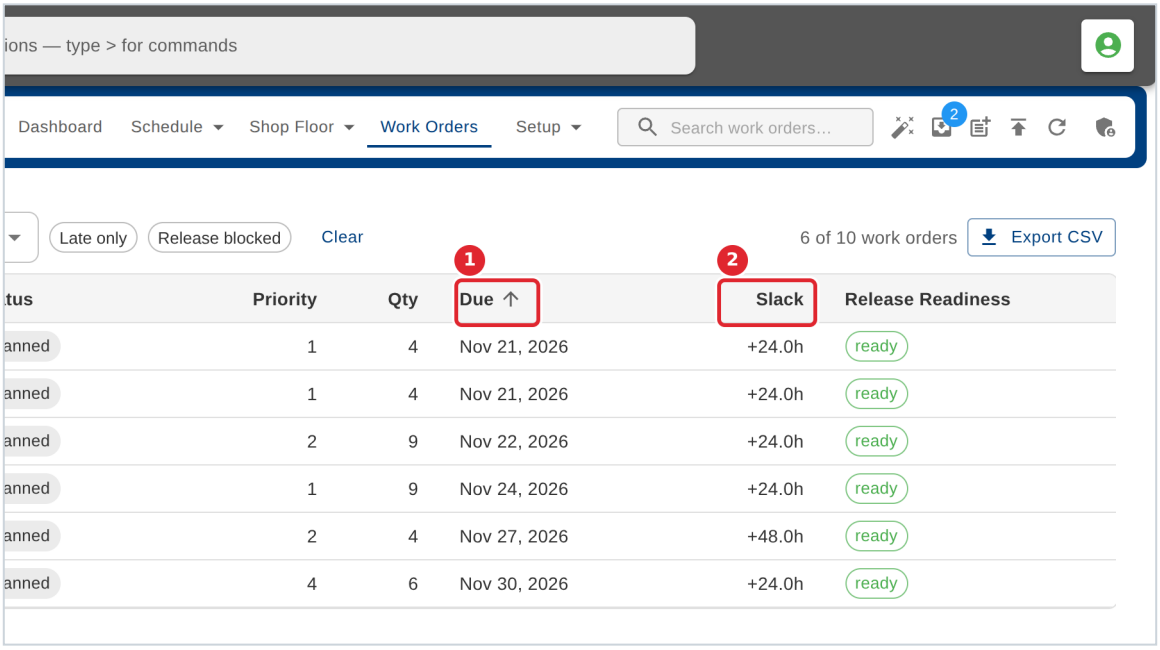
Step 1. Select Work Orders.



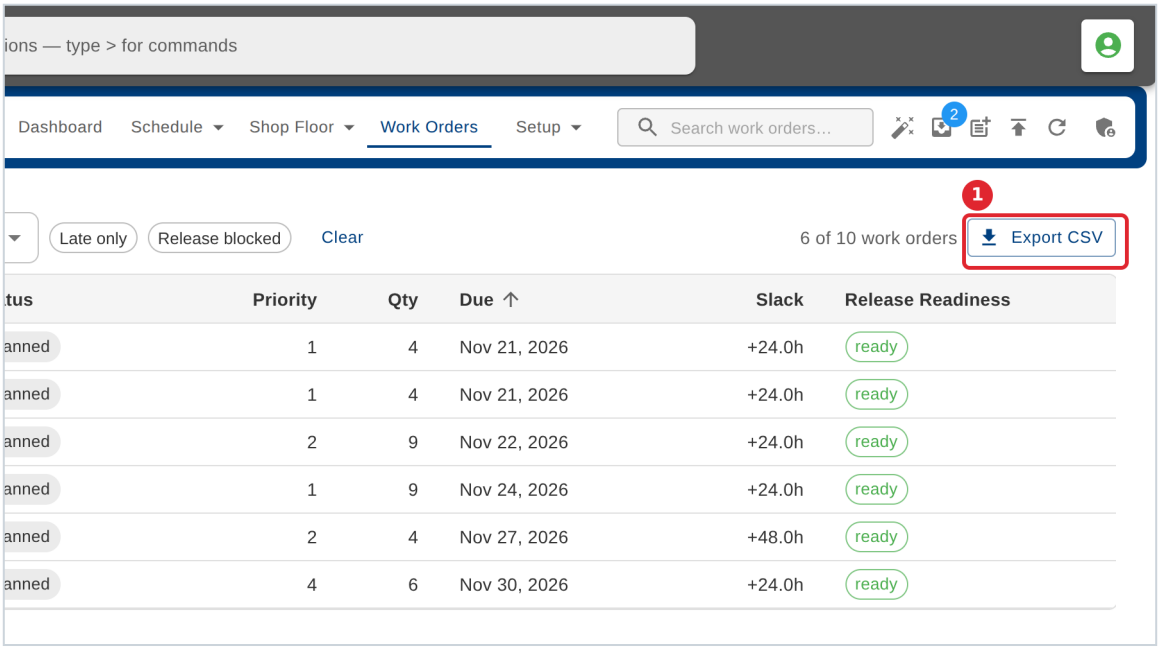
Step 2. Search by order, or filter by status and plant.



Step 3. Select Late only or Release blocked to see just those orders.



Step 4. Select a column heading to sort by it. Slack is the time to spare before the due date.



Step 5. Select Export CSV to download the list as shown.

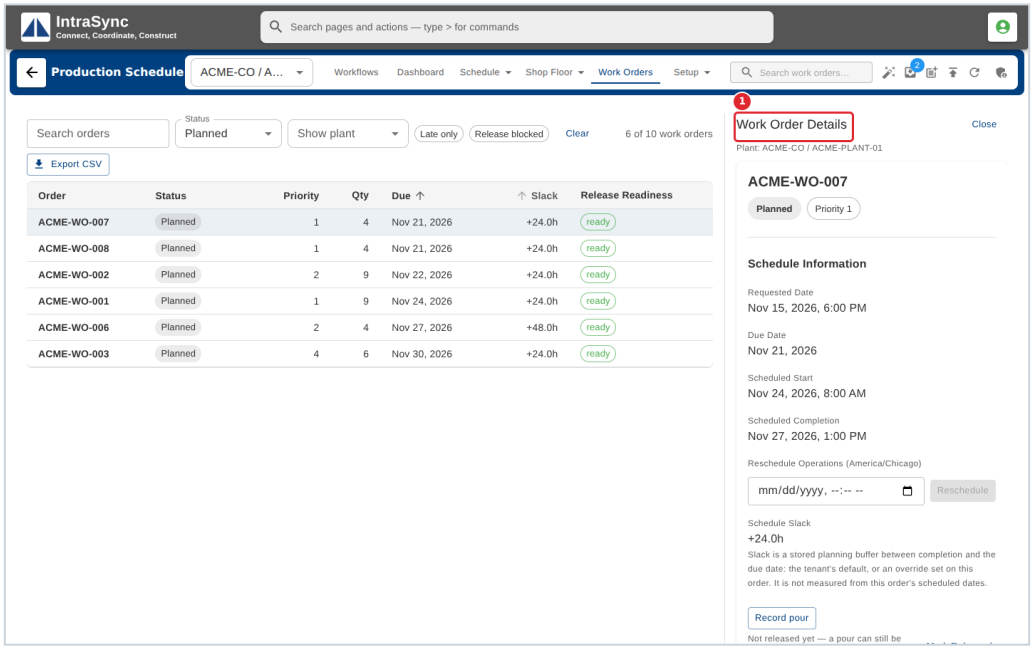
Tips:

- Slack is a stored planning buffer between completion and the due date. It is not measured from the order's scheduled dates.
- When filters hide every order, select Clear filters to see them again.
- Release Readiness shows whether a planned order passes the release gate.

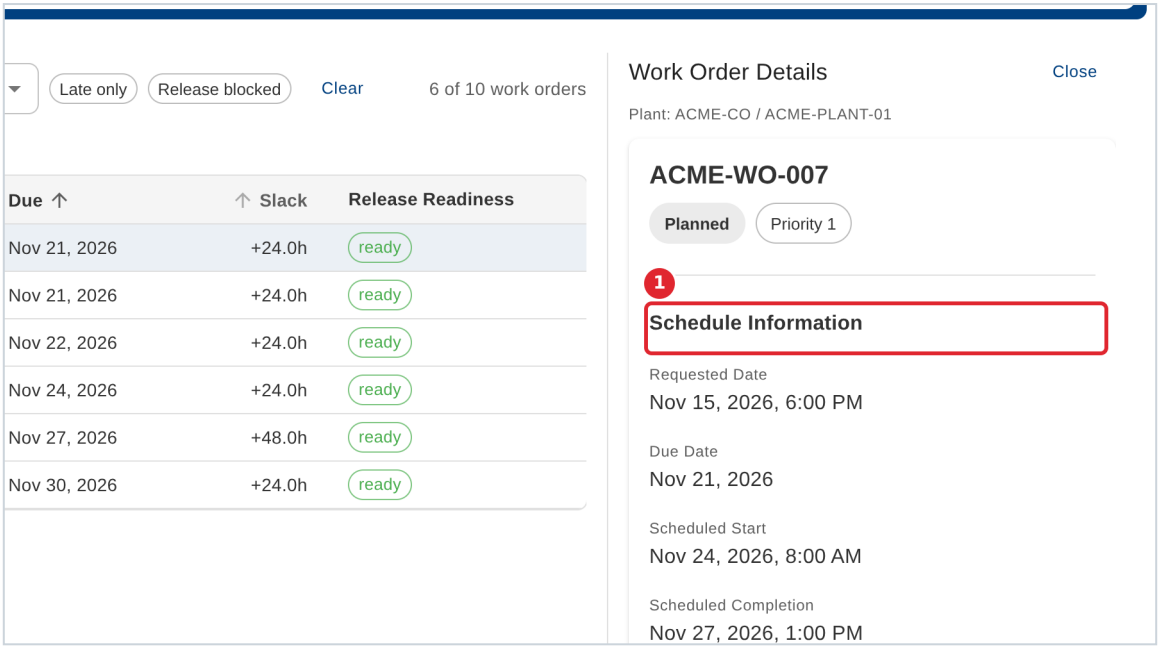
This is shown in the Production Schedule video at 0:52.

11. Reschedule a work order or change its status

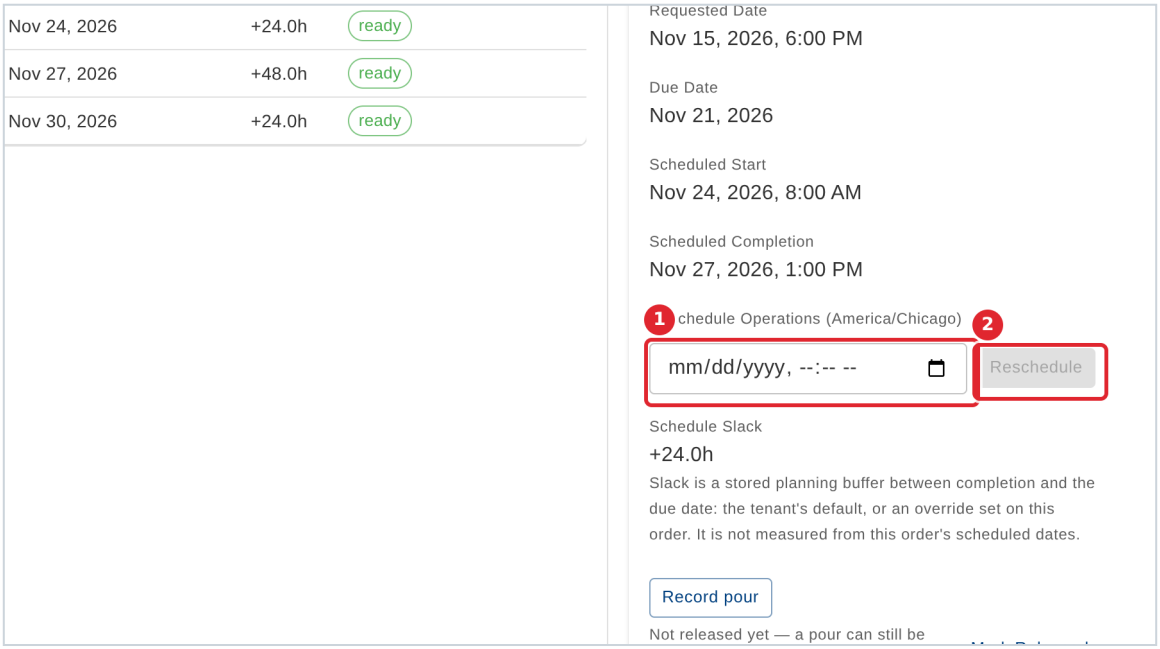
Move one order to a new start, or move it on through its statuses.



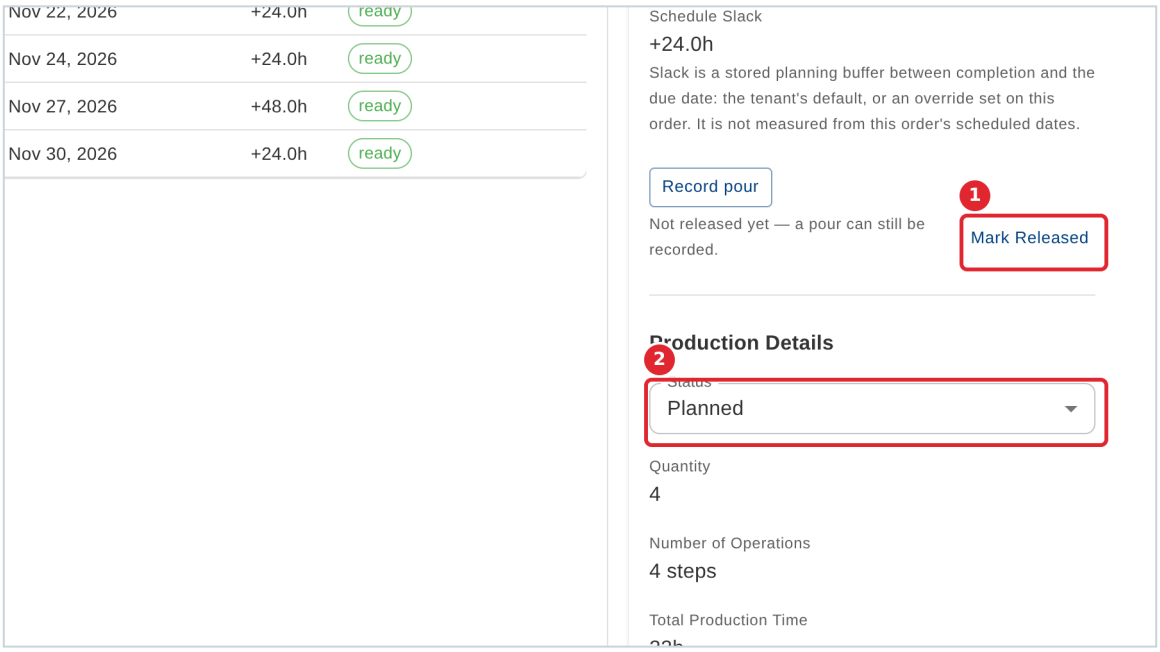
Step 1. Select a work order to open its details.



Step 2. Read its schedule: requested, due, scheduled start and completion, and its slack.



Step 3. To move the whole order, enter a new start in plant time, then select Reschedule.



Step 4. Change the order's status with Mark Released, or pick a status from the list.

Tips:

- Reschedule stays unavailable until you enter a new start. The start is in the plant's time zone.
- A status change can be refused by your system's rules, for example a quality check.
- Select Close to put the details away.

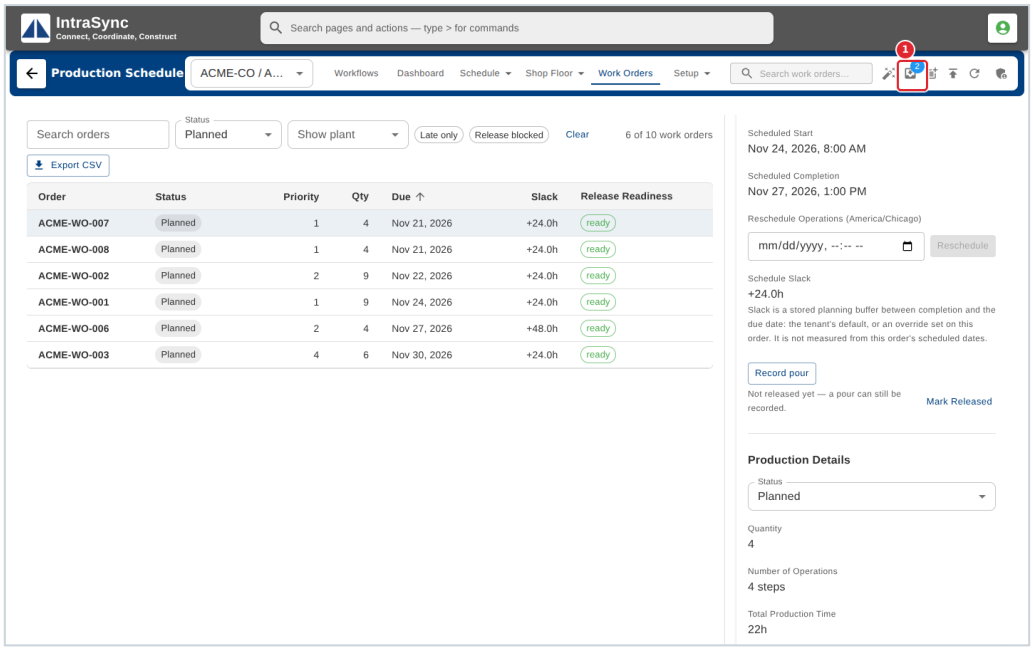
This is shown in the Production Schedule video at 1:21.

12. Turn released sales-order lines into work orders

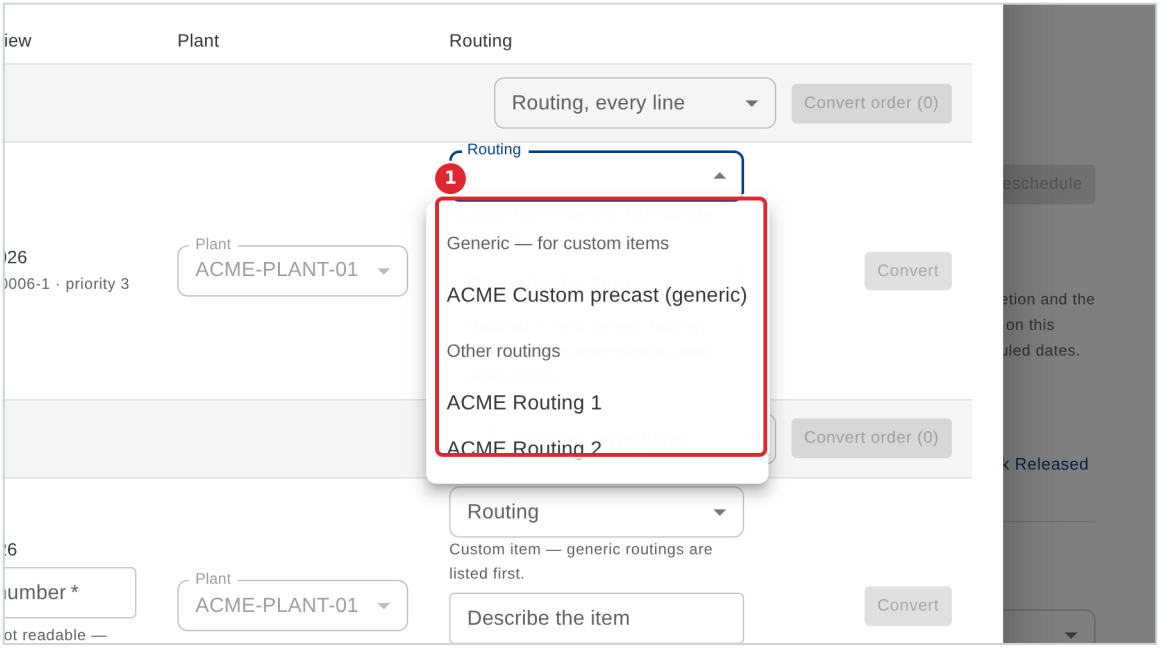
Create the work orders behind released sales-order lines so they can be scheduled.

Before you start:

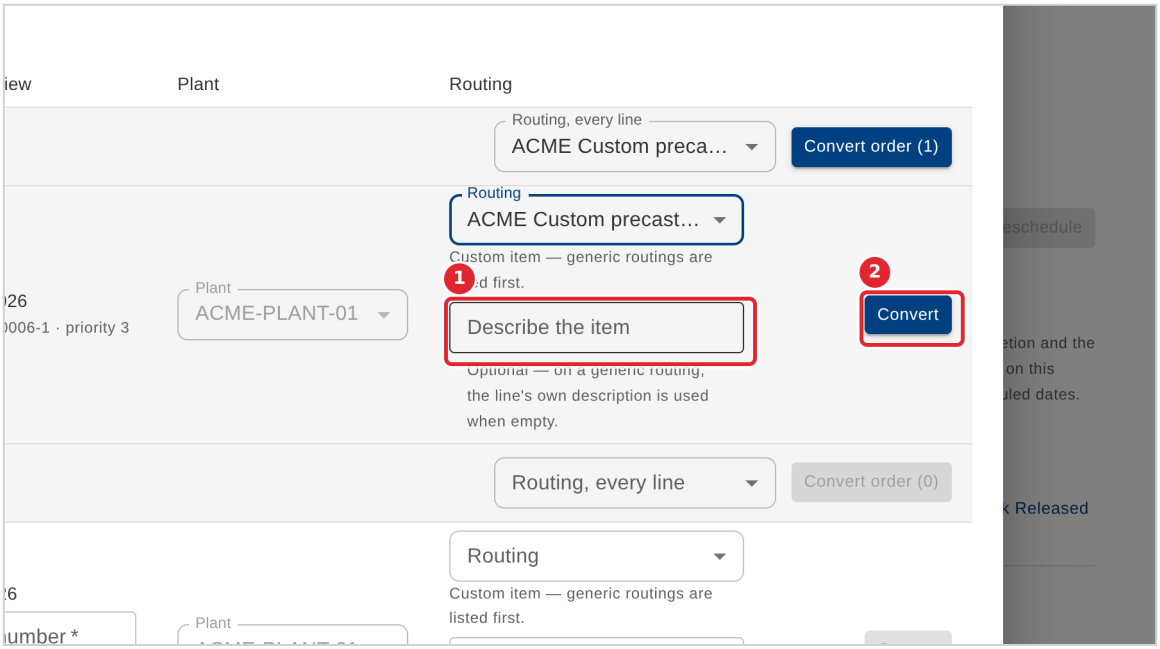
– Sales-order lines must be released before they appear here.



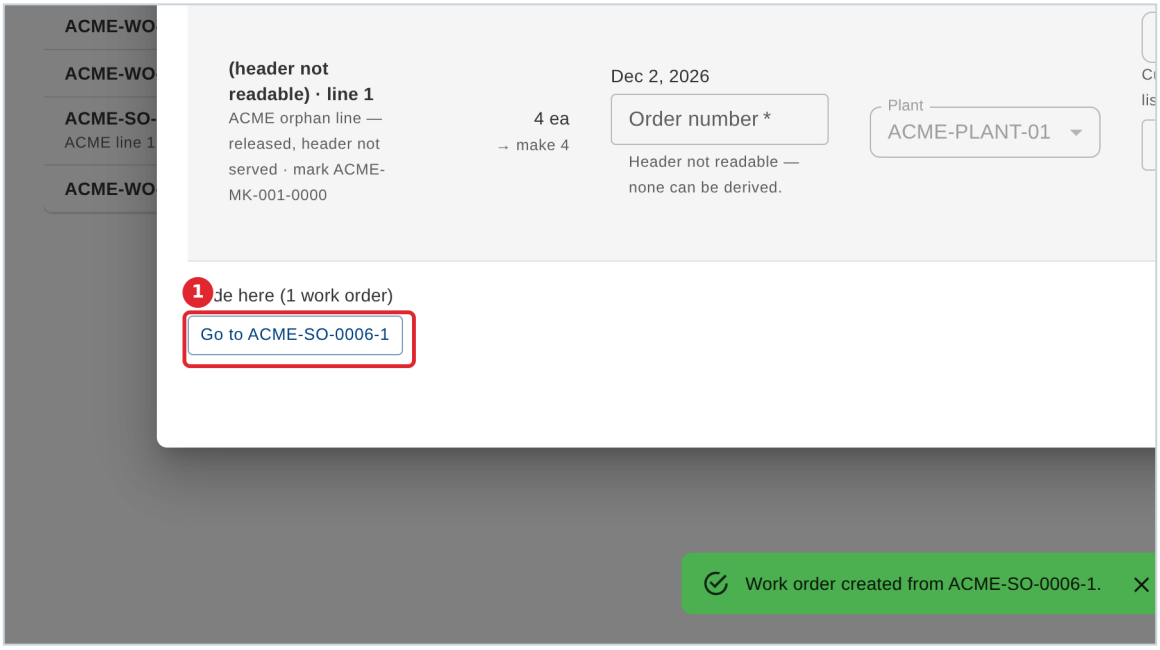
Step 1. Select Convert sales-order lines. The badge shows how many released lines are waiting.



Step 2. For a line, choose the routing to make it by.



Step 3. Add an item description if the routing is generic, then select Convert.



Step 4. The new work order is created as Planned. Select Go to to open it.

– Step 5. To convert every line of a sales order at once, choose a routing in Routing, every line, then select Convert order.

Tips:

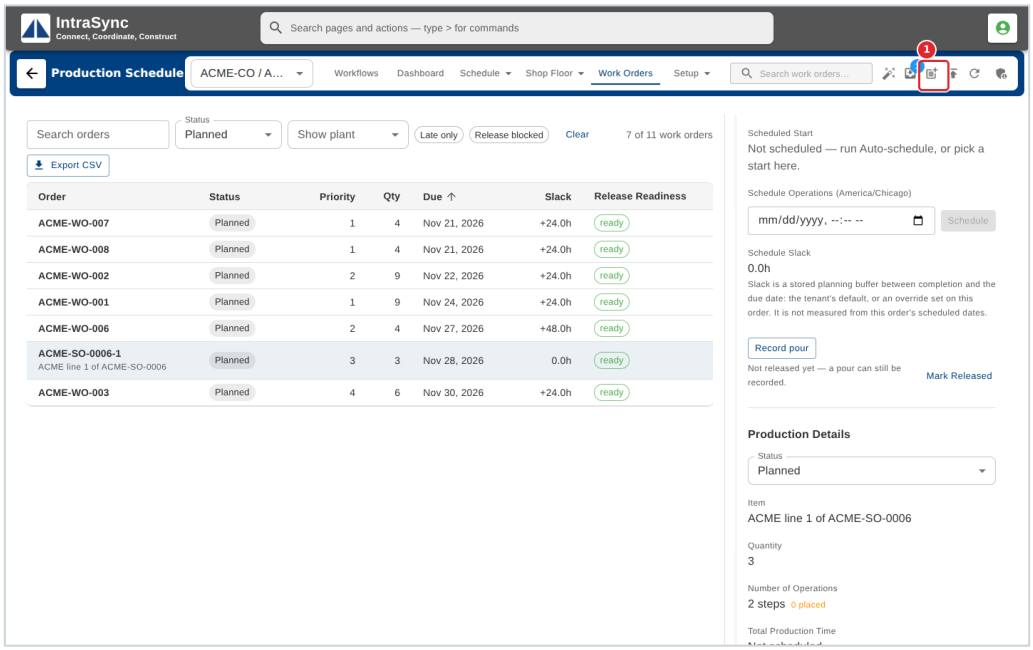
– A released line arrives with no routing. Convert stays unavailable until you choose one.
– For a custom item, generic routings are listed first.
– The new work order is created as Planned, ready to be scheduled.

13. Schedule a custom item

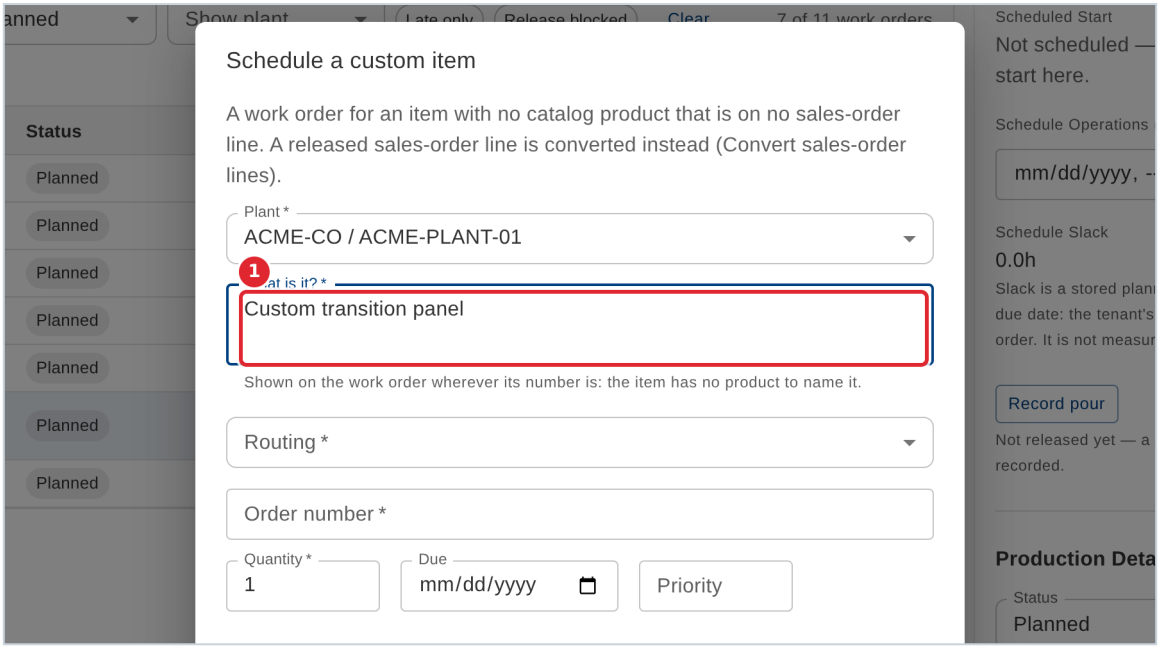
Make a work order for an item that has no catalog product and is on no sales-order line.

Before you start:

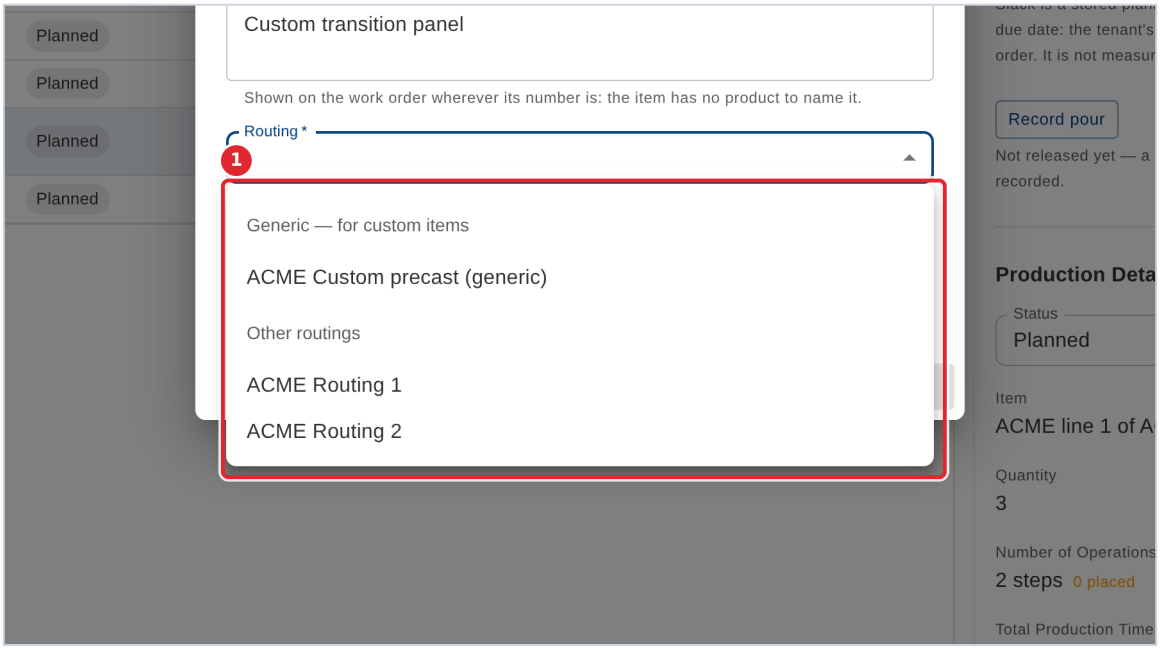
- Your company needs at least one generic routing. Without one, this button is not shown.
- For an item on a released sales-order line, use Convert sales-order lines instead.



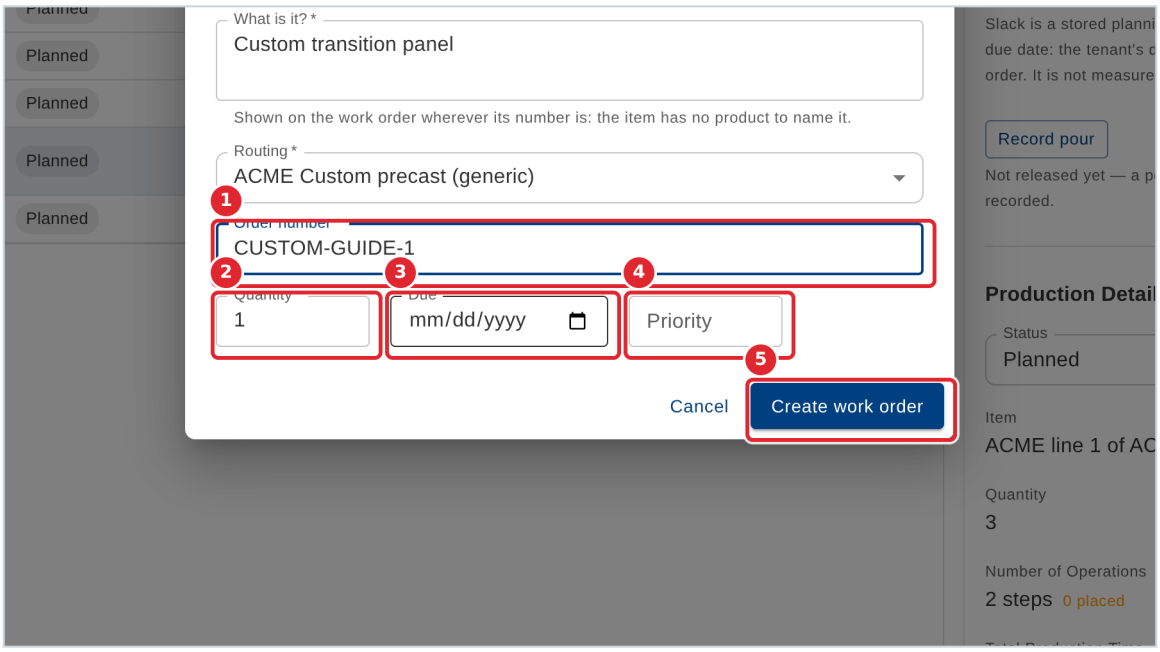
Step 1. Select Schedule a custom item.



Step 2. In What is it?, describe the item. The description names the item wherever its order number is shown.



Step 3. Choose a routing. Generic routings, made for custom items, are listed first.



Step 4. Enter the order number, quantity, due date and priority, then select Create work order.

Tips:

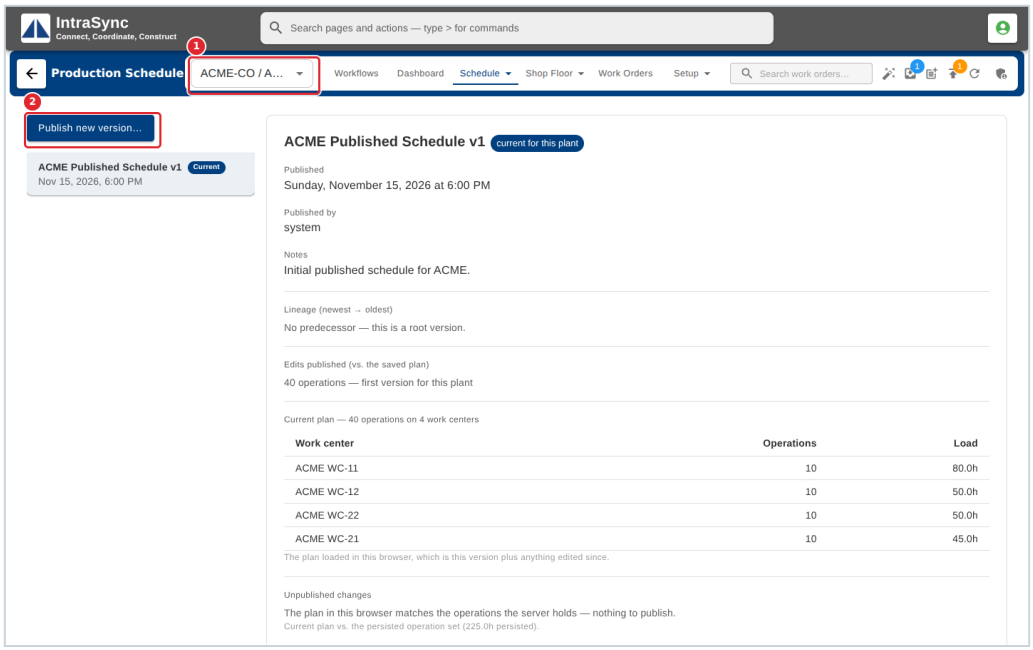
- Plant, item description, routing, order number and quantity are required. Create work order stays unavailable until they are filled.
- Due date and priority are optional.

14. Publish a schedule version

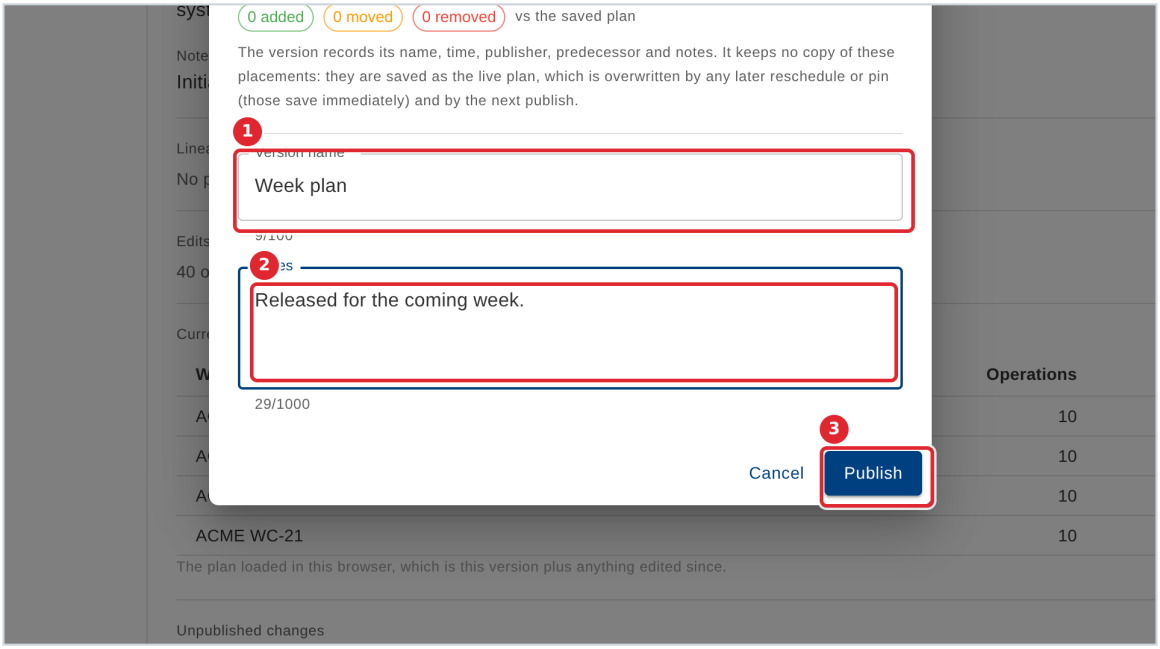
Save one plant's plan for the floor to work from, and record it as a version.

Before you start:

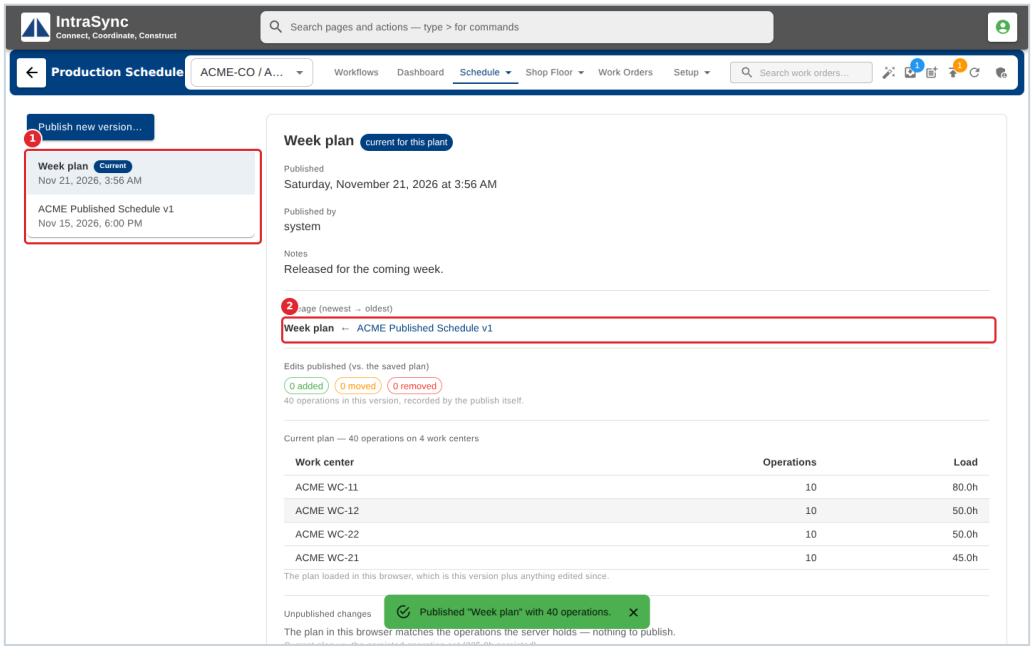
– Choose one plant in the plant selector. With all plants showing, Publish asks you to pick a plant first.



Step 1. With one plant chosen, select Schedule > Versions, then Publish new version.



Step 2. Read what will be published, enter a version name and notes, then select Publish.



Step 3. The new version is now current, and its lineage shows the version it follows.

– Step 4. You can also publish from the Publish button in the header.

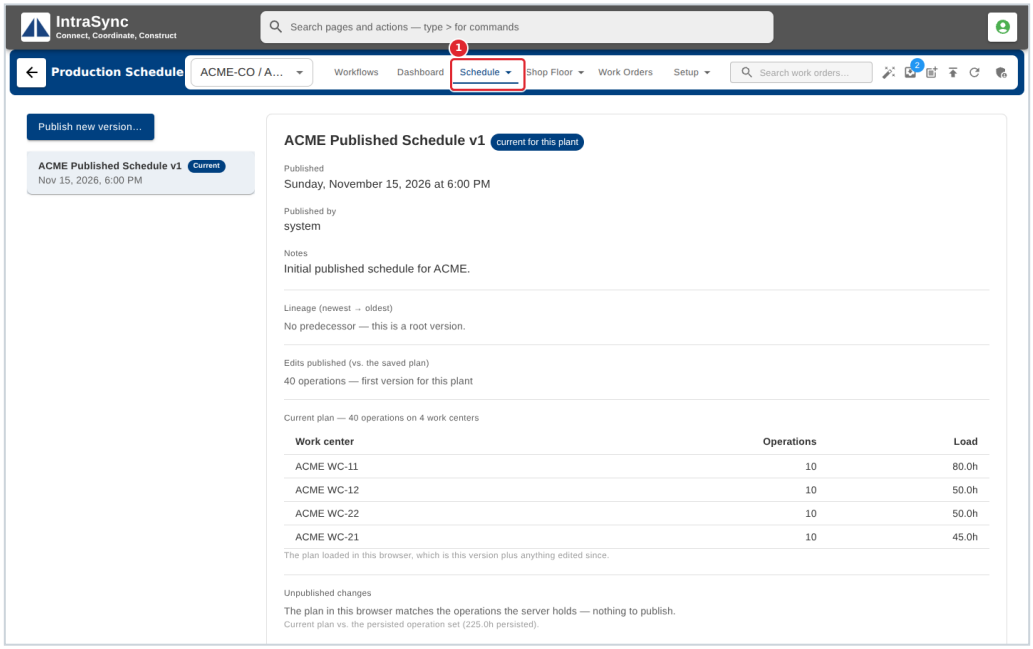
Tips:

– A version records its name, time, publisher, predecessor and notes. The placements themselves are saved as the live plan.
– The dialog shows how many operations were added, moved or removed compared with the saved plan.
– The Publish button's badge counts work orders blocked by the release gate.

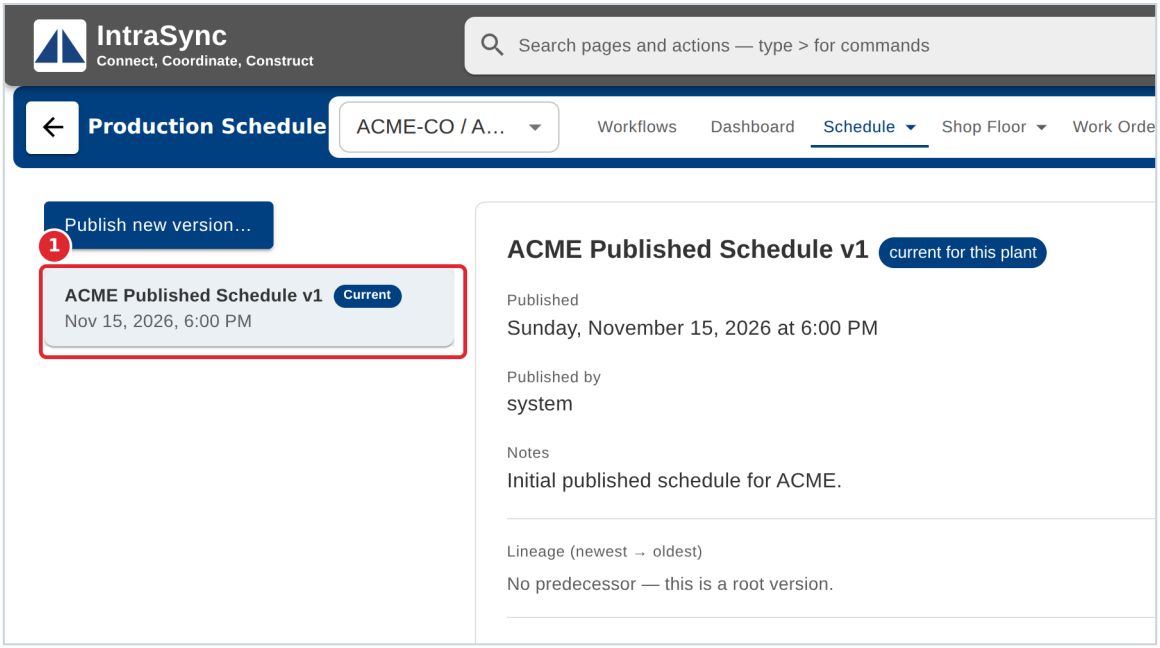
This is shown in the Production Schedule video at 1:40.

15. Review published versions

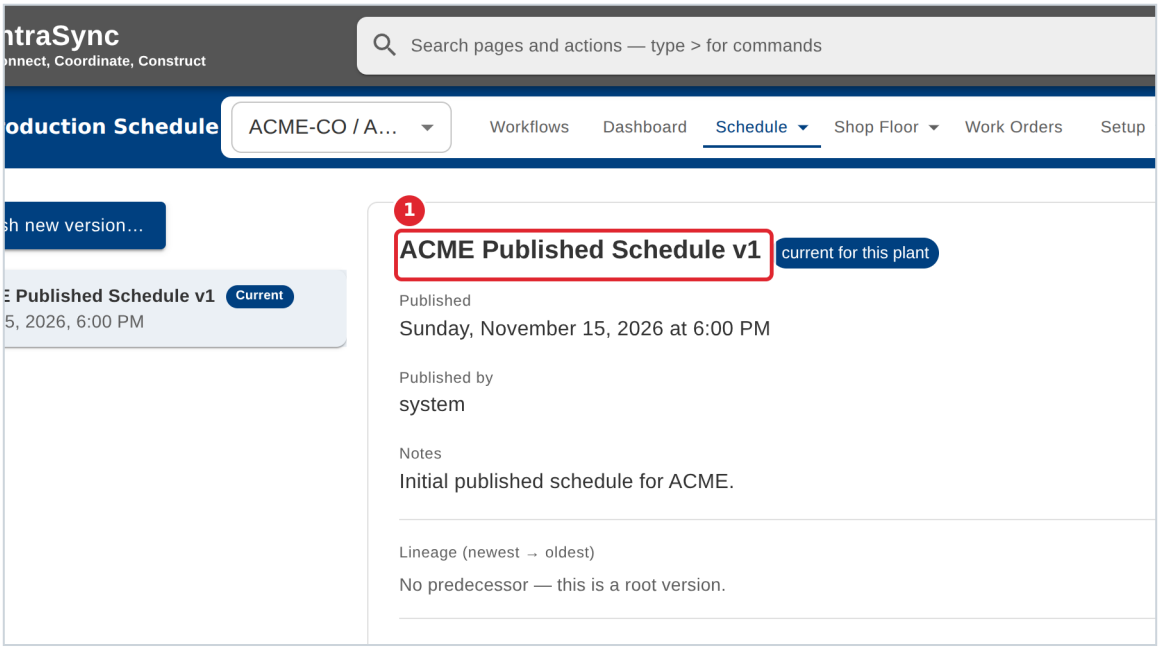
See which version the plant is working to, and how it came to be.



Step 1. Select Schedule > Versions.



Step 2. Select a version in the list. The current one is marked Current.



Step 3. Read when it was published, by whom, its notes, its predecessor and what it changed.

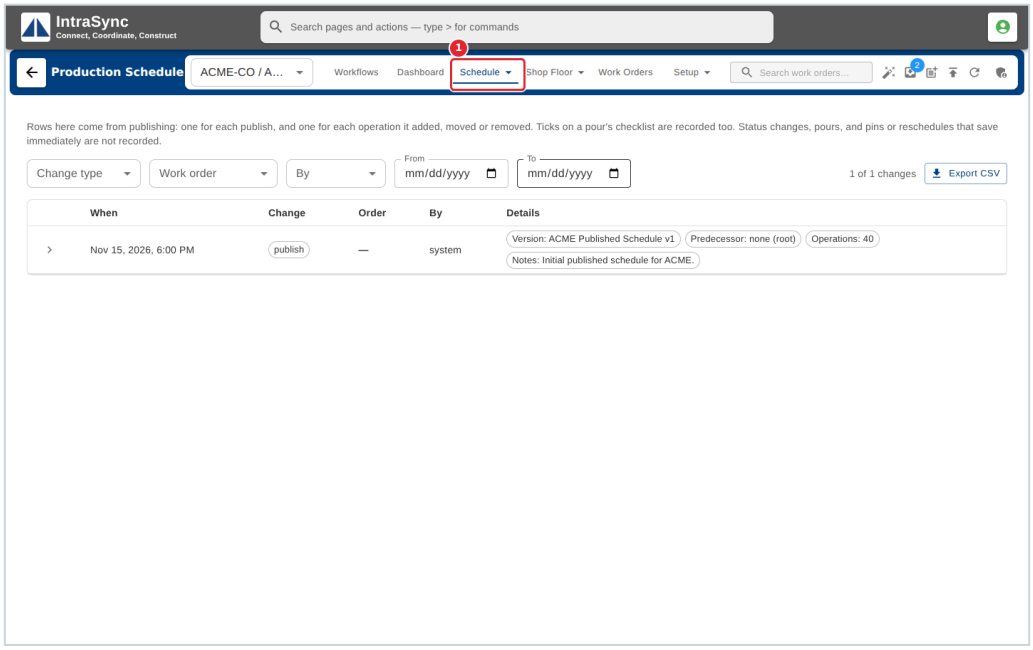
Tips:

– Unpublished changes, at the foot of the page, says whether the plan in your browser differs from what the server holds.

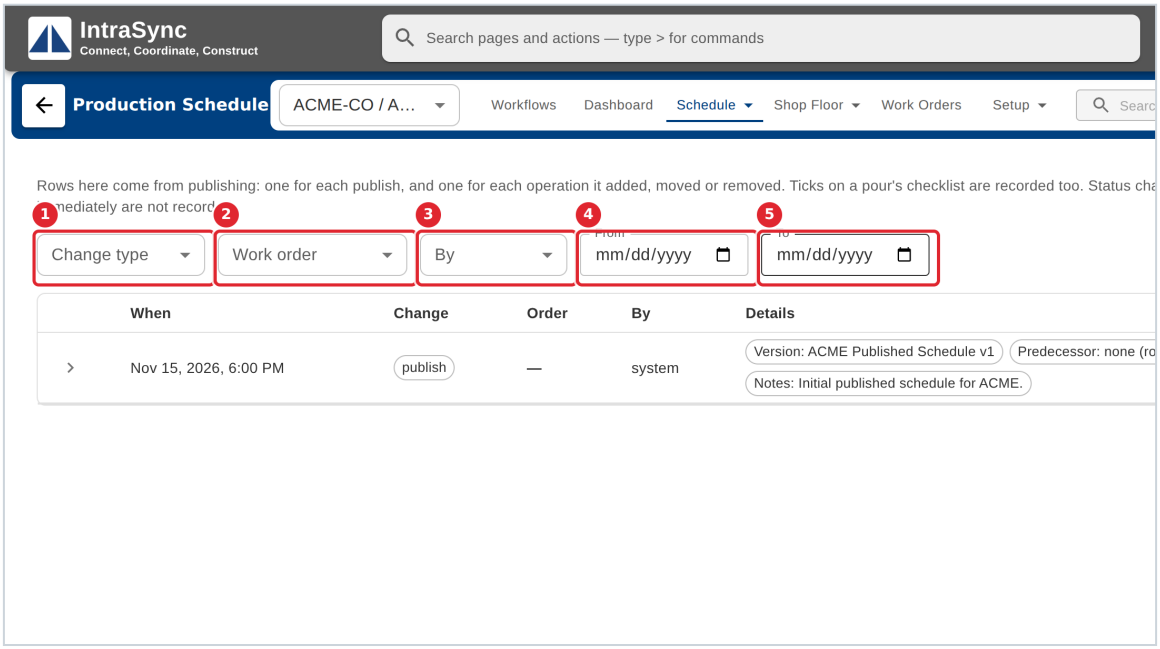
This is shown in the Production Schedule video at 0:27.

16. Review the Change Log

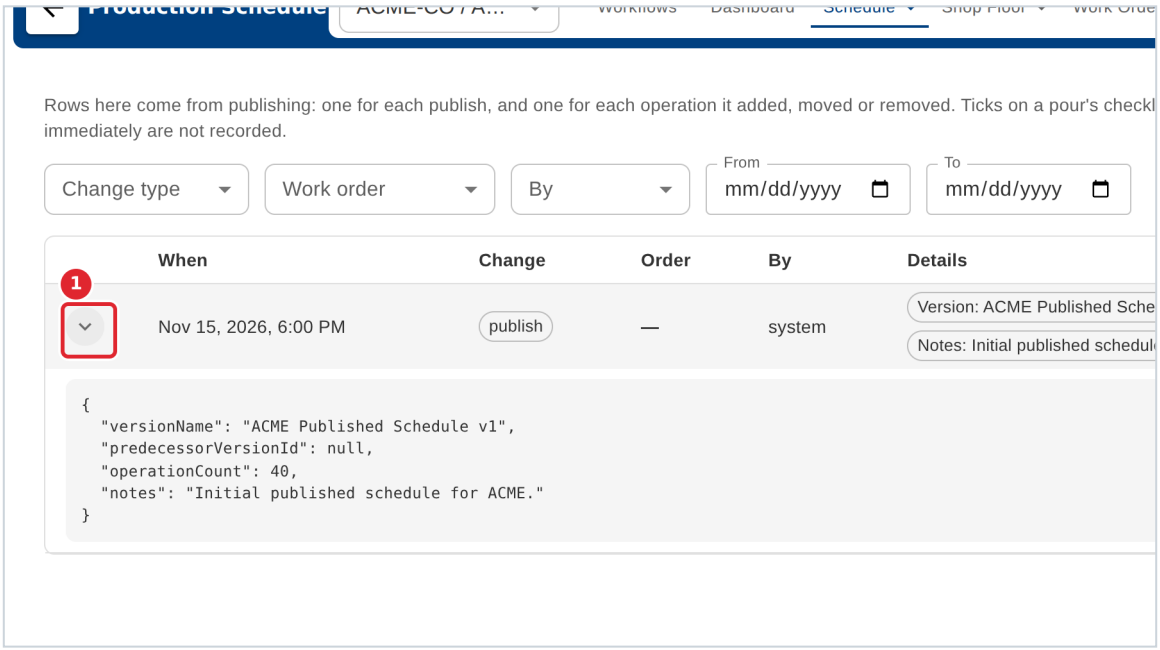
See what was done to the plan, when and by whom.



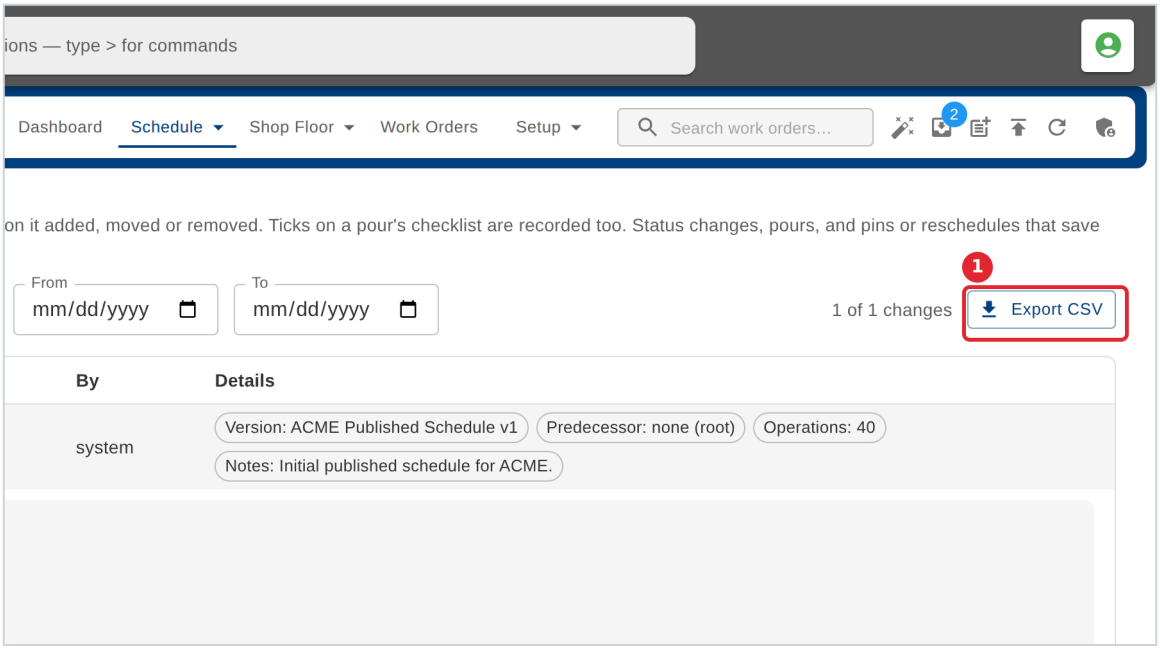
Step 1. Select Schedule > Change Log.



Step 2. Narrow the list by change type, work order, who made the change, and dates.



Step 3. Select Show payload to see the full detail of a change.



Step 4. Select Export CSV to download the changes shown.

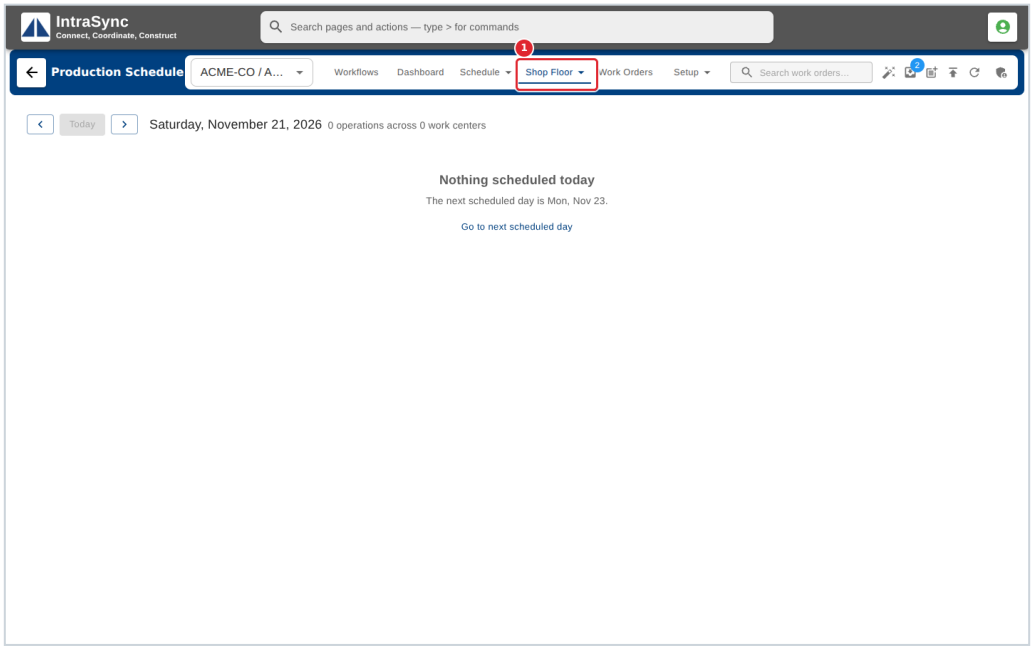
Tips:

– Rows come from publishing: one for each publish, and one for each operation it added, moved or removed. Ticks on a pour's checklist are recorded too.

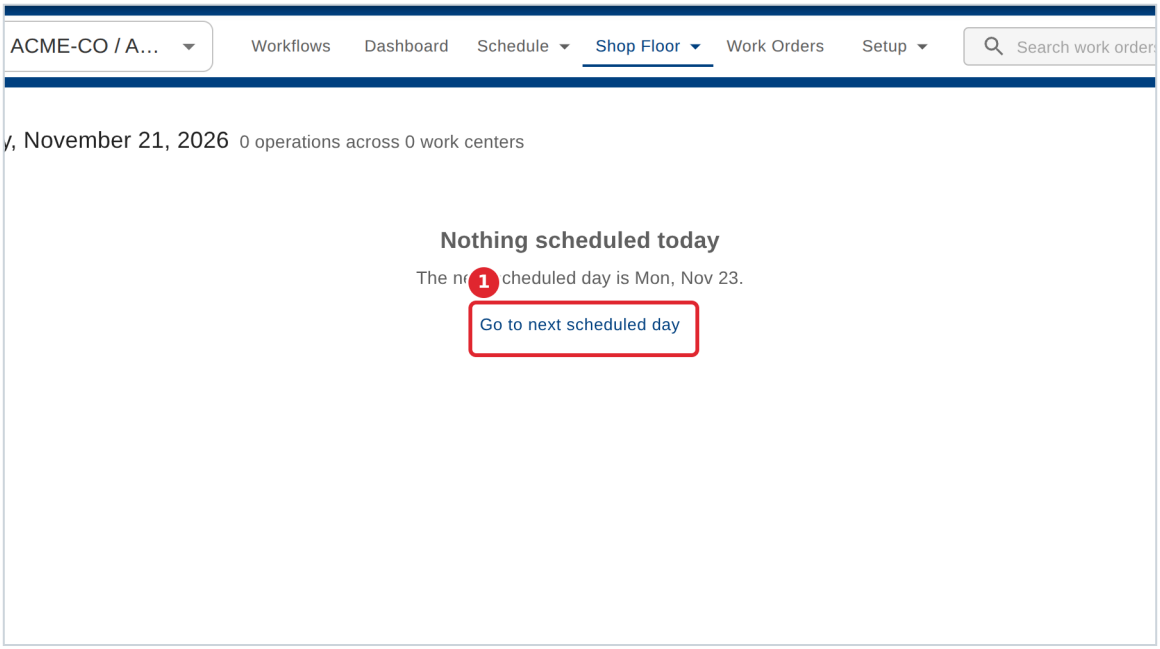
This is shown in the Production Schedule video at 0:33.

17. See today's work on the shop floor

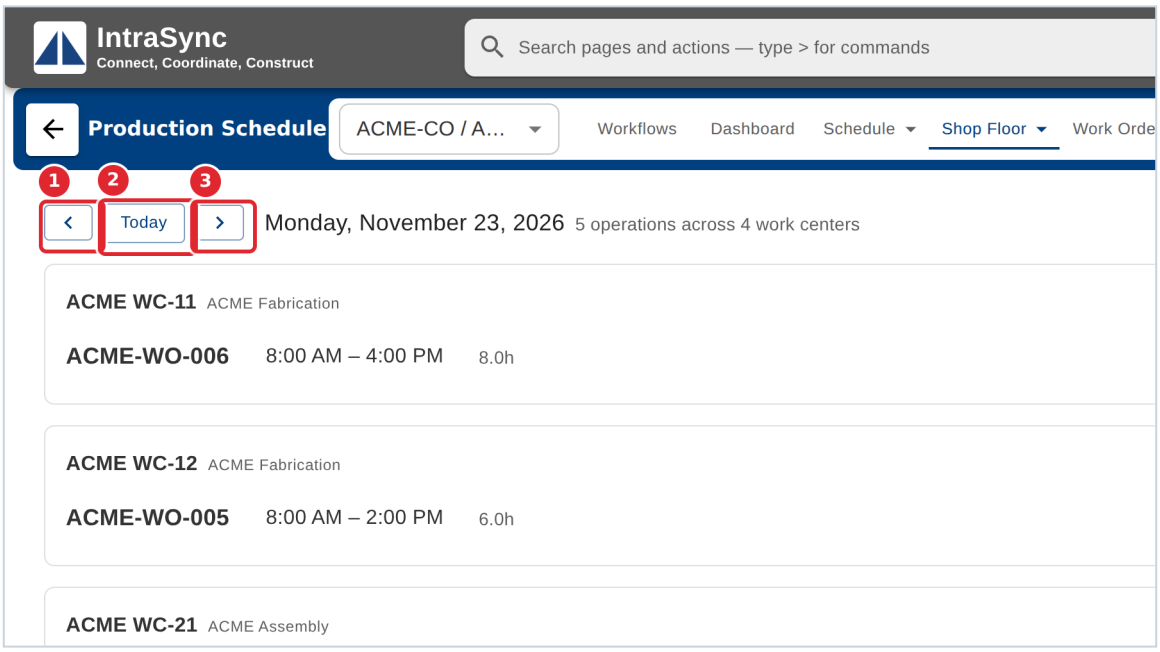
Show the plant what it is working on today, work center by work center.



Step 1. Select Shop Floor > Today.



Step 2. On a day with nothing scheduled, select Go to next scheduled day.



Step 3. Read the day's operations, work center by work center. Use Previous day, Today and Next day to move.

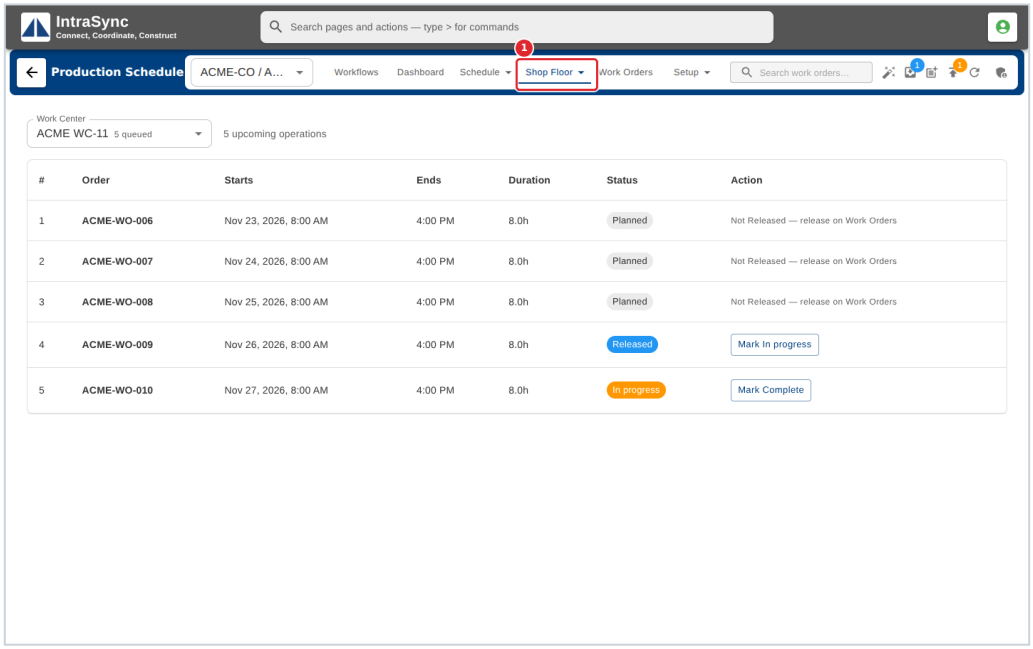
Tips:

– Today follows the plant's own time zone.

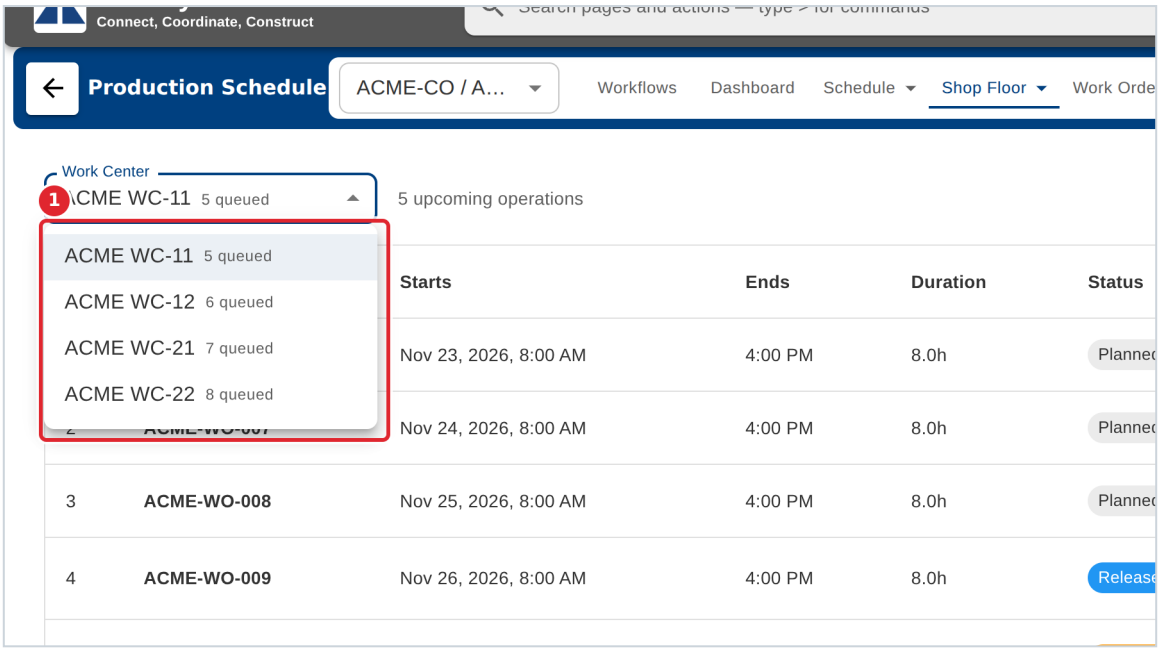
This is shown in the Production Schedule video at 0:40.

18. Work a work center's queue

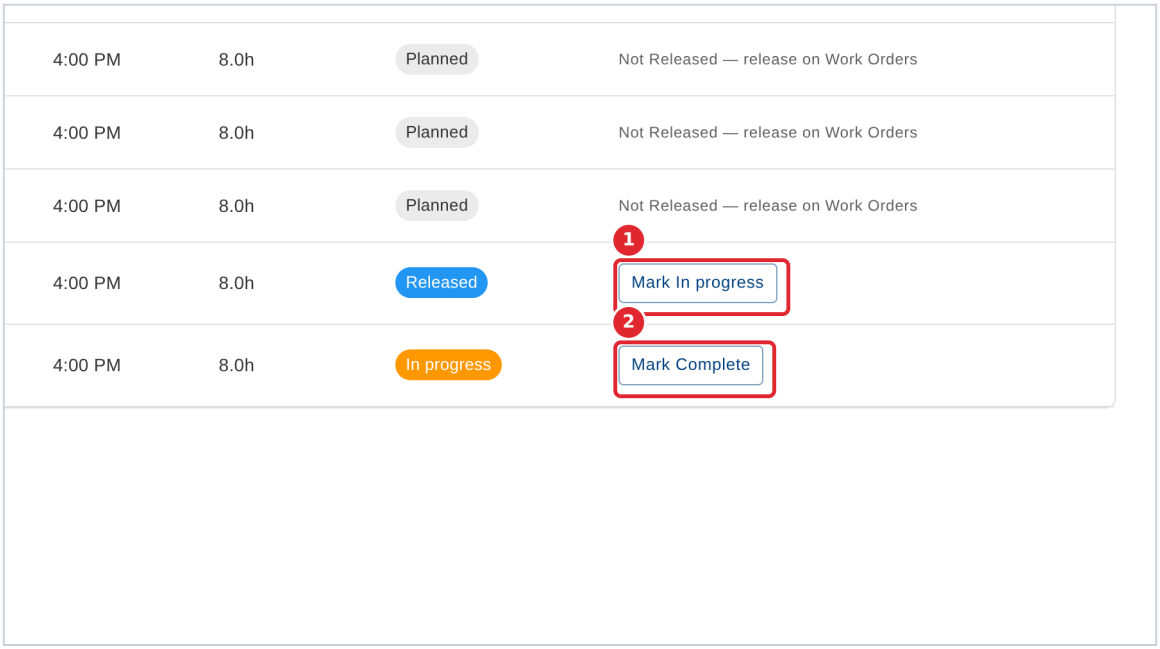
Run the work at one work center in order, and record when each operation starts and finishes.



Step 1. Select Shop Floor > Run Queue.



Step 2. Choose the work center. Each one shows how many operations are queued.



Step 3. Work down the list in order. Select Mark In progress when work starts and Mark Complete when it is done.

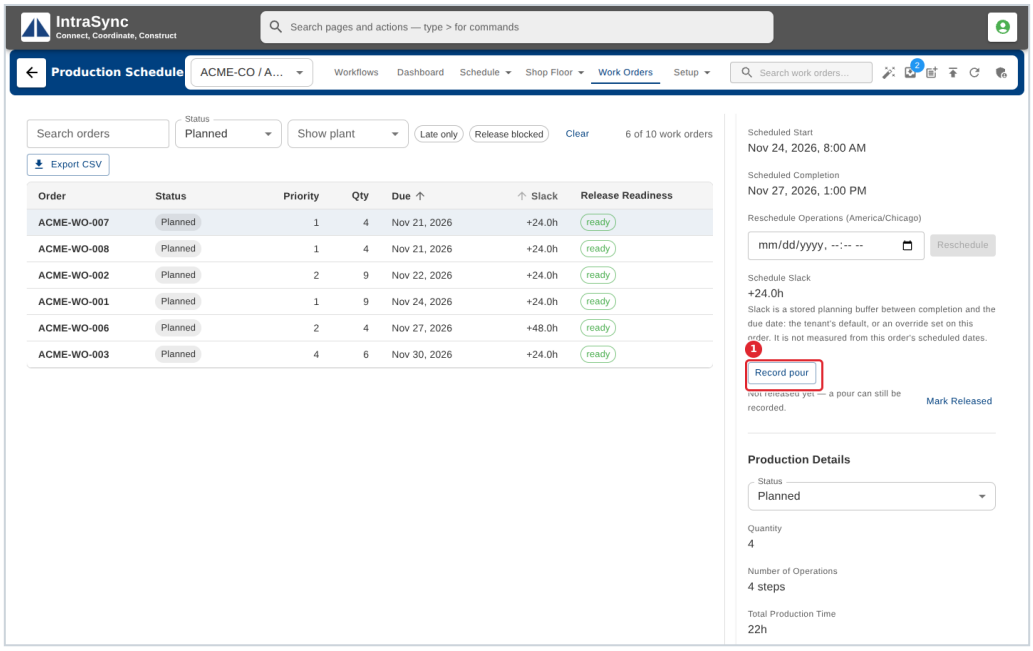
Tips:

– An operation whose work order is not released yet says so. Release it on Work Orders first.

This is shown in the Production Schedule video at 0:46.

19. Record a pour

Record the pieces that were cast for a work order.



Step 1. In a work order's details, select Record pour.

– Step 2. Tick the pieces that were cast, or tick the box at the top of the list to select them all.

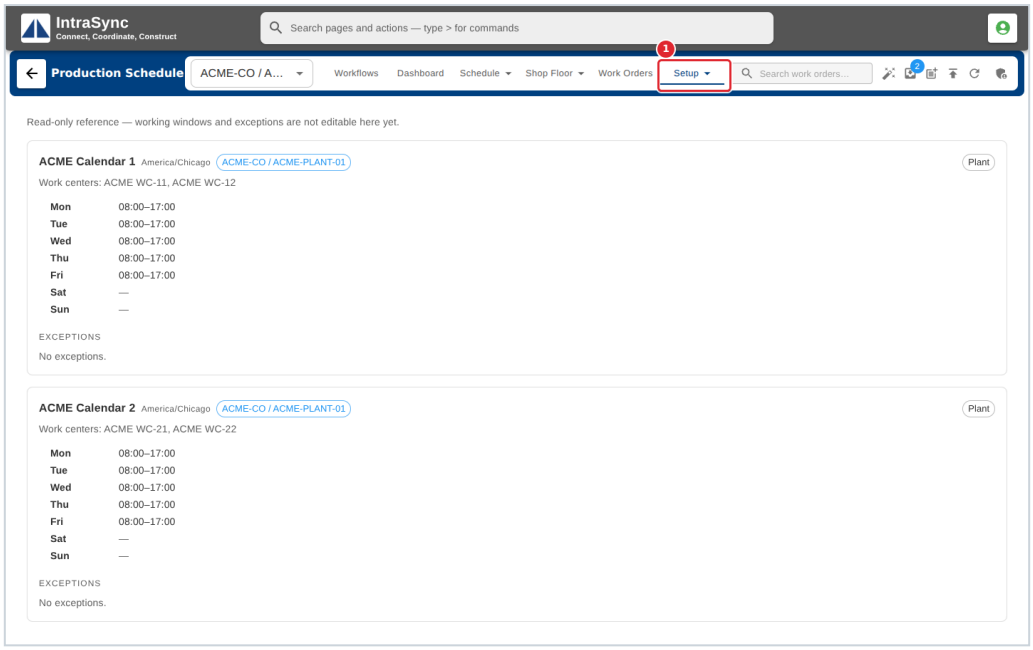
– Step 3. Select Record pour to save, or Cancel to leave without recording.

Tips:

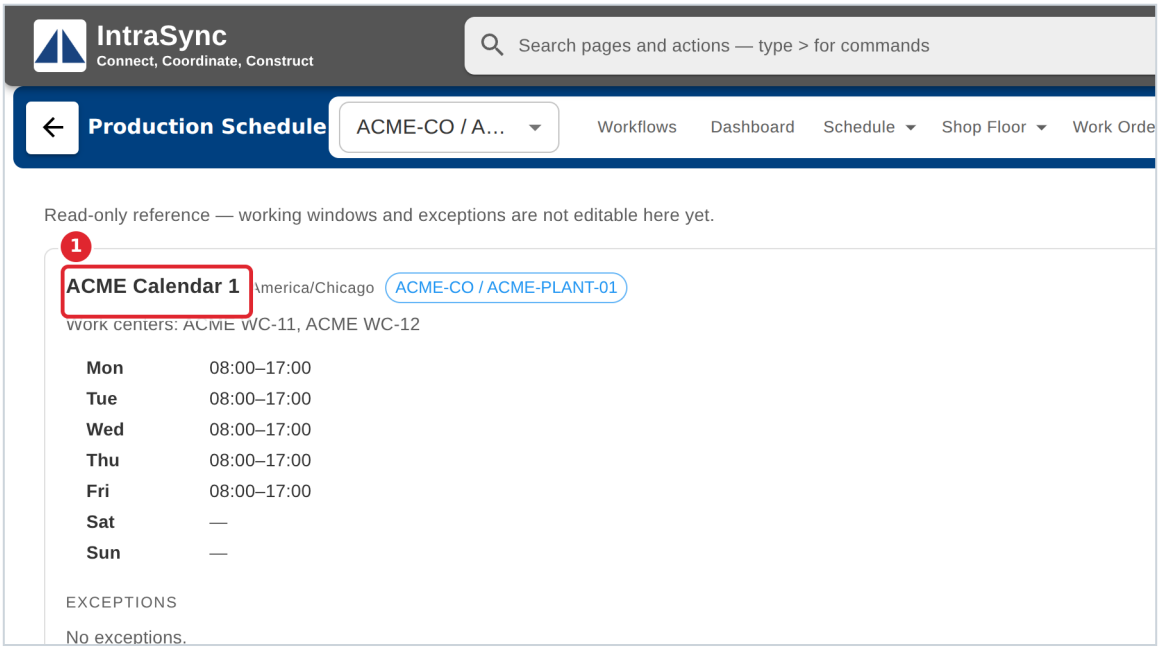
– A pour can be recorded before the work order is released.
– The list shows planned pieces for the order's plant. Turn on the option to show only this order's mark when it has one.

20. Check working calendars

See the working hours and exceptions the schedule plans around.



Step 1. Select Setup > Calendars.



Step 2. Read each calendar's working hours for each weekday, the work centers that use it, and its exceptions.

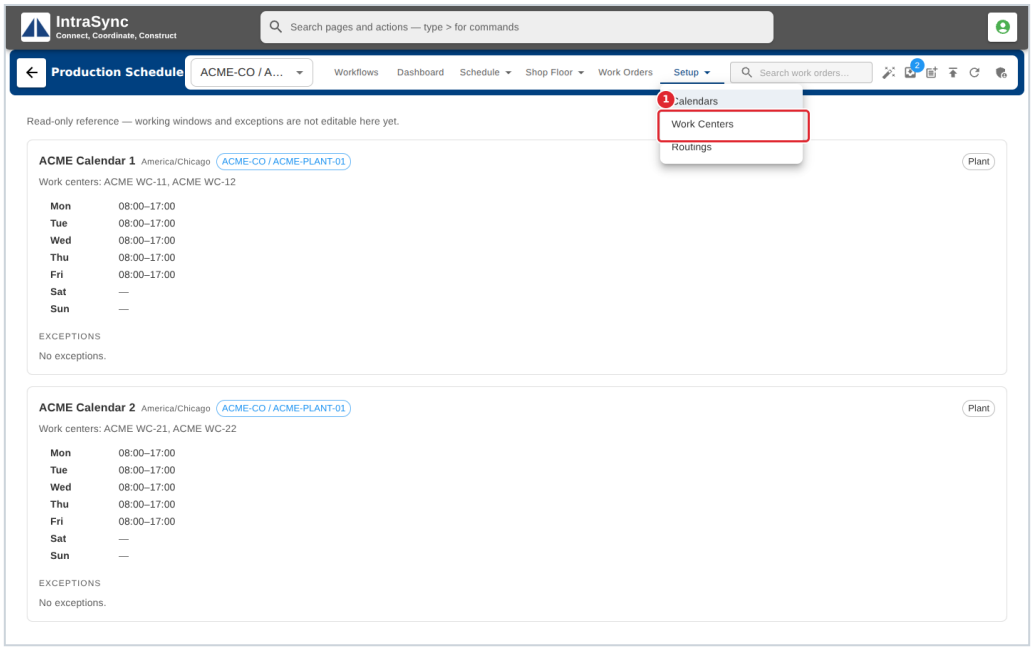
Tips:

- Calendars are read-only here.

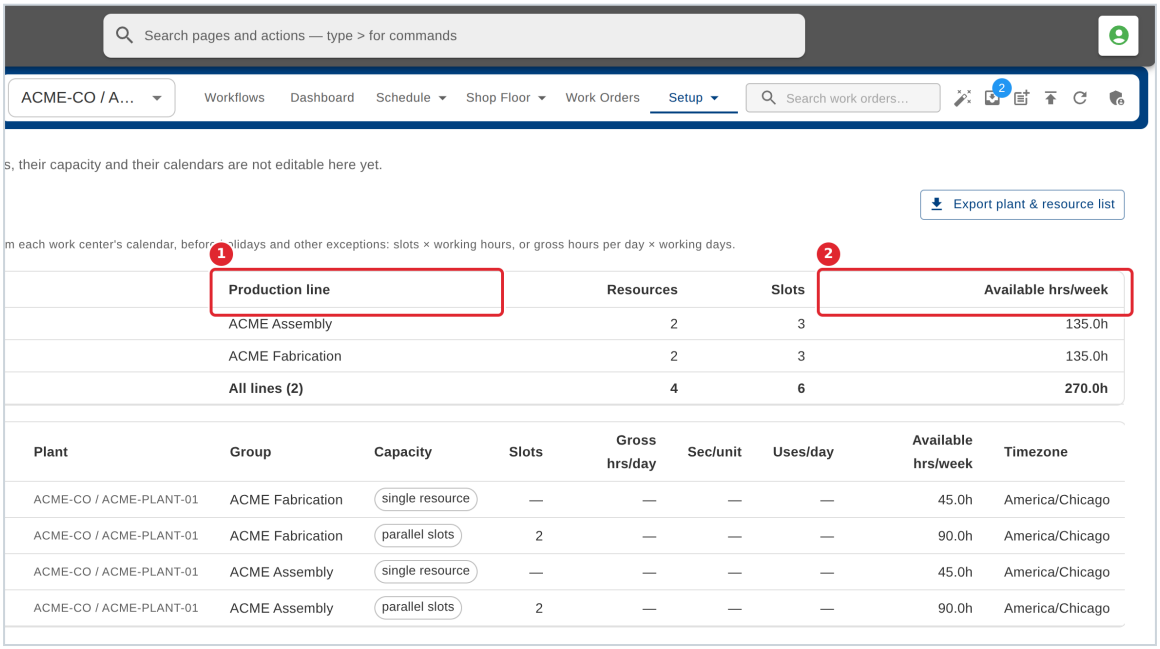
This is shown in the Production Schedule video at 0:56.

21. Review work centers

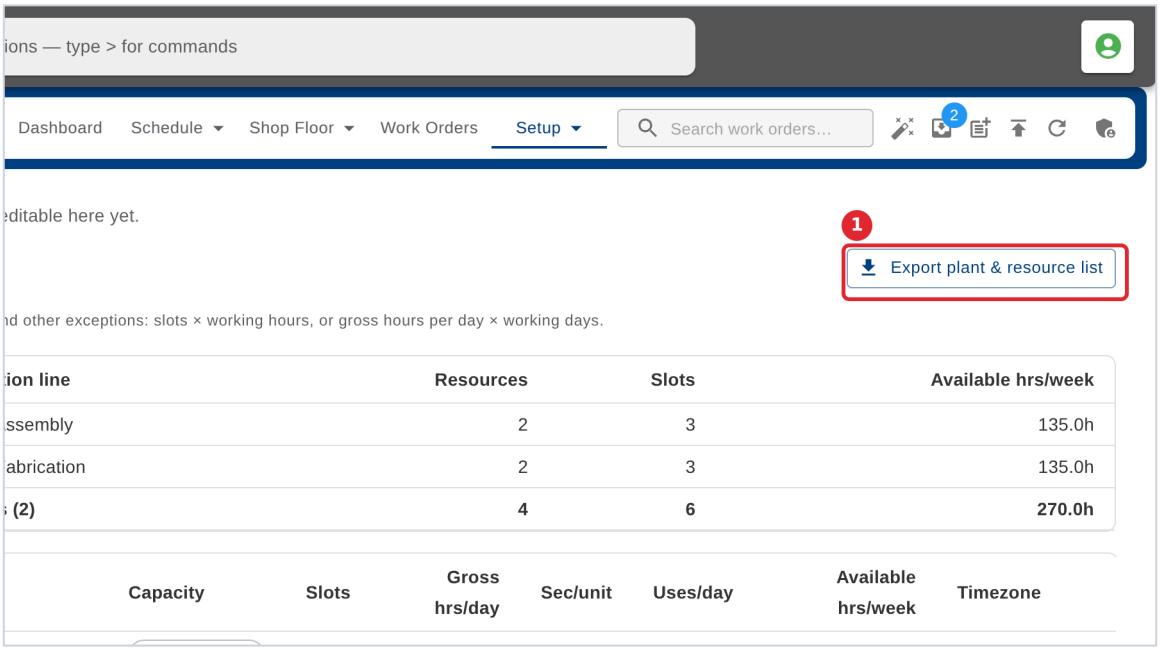
See the work centers and groups the schedule places work on, and how much time each has.



Step 1. Select Setup > Work Centers.



Step 2. Read the plants and production lines, then each work center's plant, group, capacity and available hours a week.



Step 3. Select Export plant & resource list to download the list.

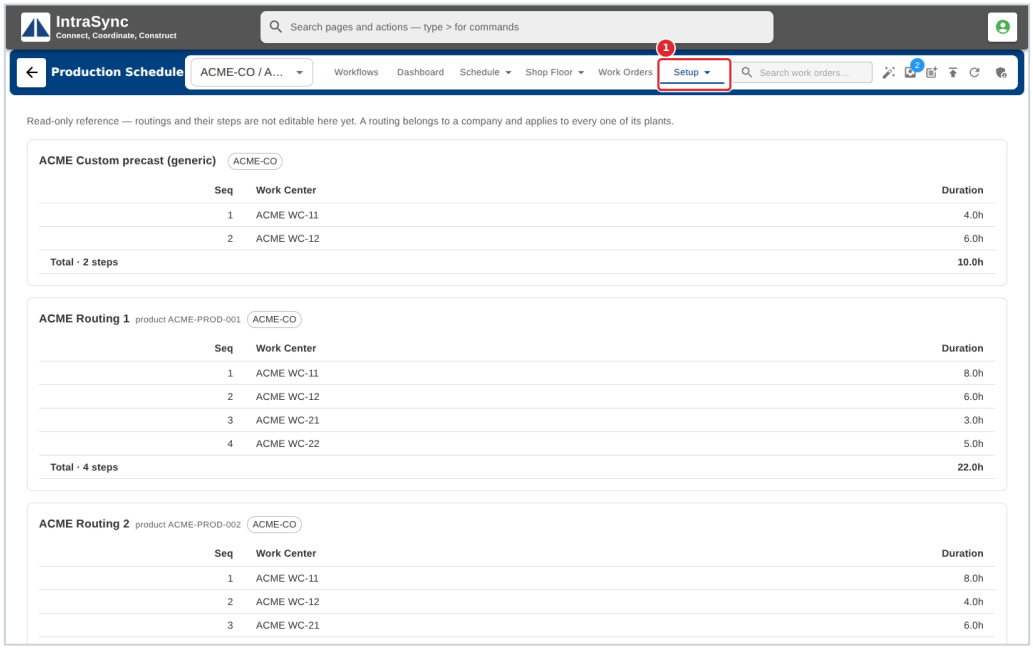
Tips:

- Work centers are read-only here.
- Available hours are a standard week from each work center's calendar, before holidays and other exceptions.

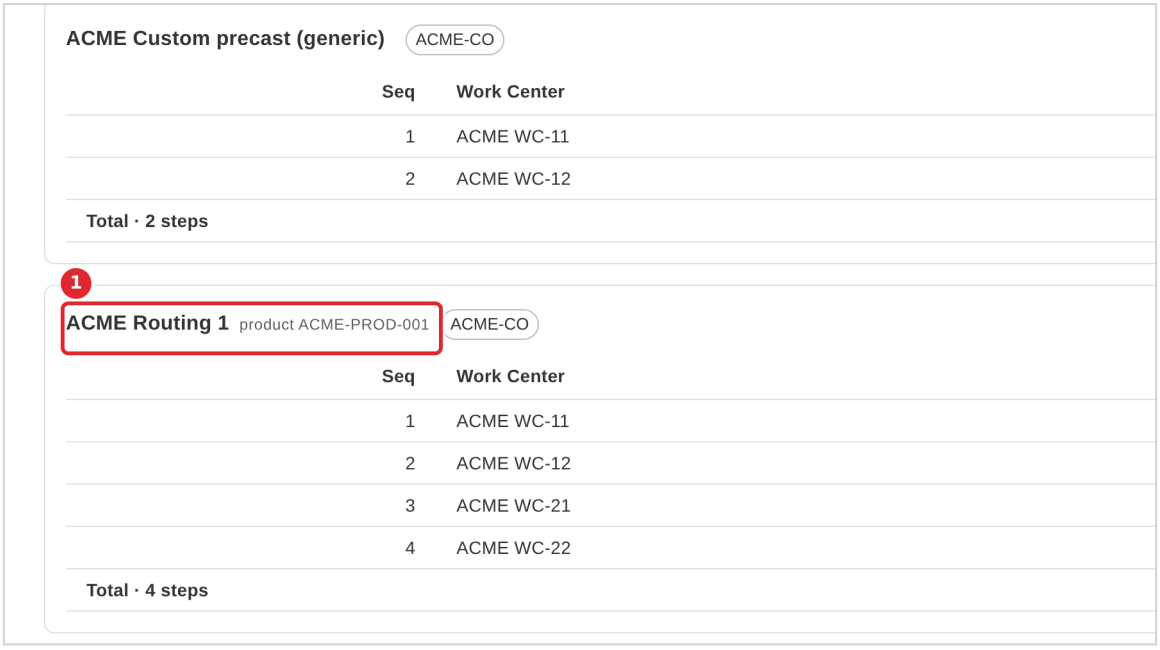
This is shown in the Production Schedule video at 1:03.

22. Review routings

See the ordered steps each product runs through.



Step 1. Select Setup > Routings.



Step 2. Read each routing's steps in order, with the work center and duration of each.

Tips:

– Routings are read-only here. A routing belongs to a company and applies to every one of its plants.

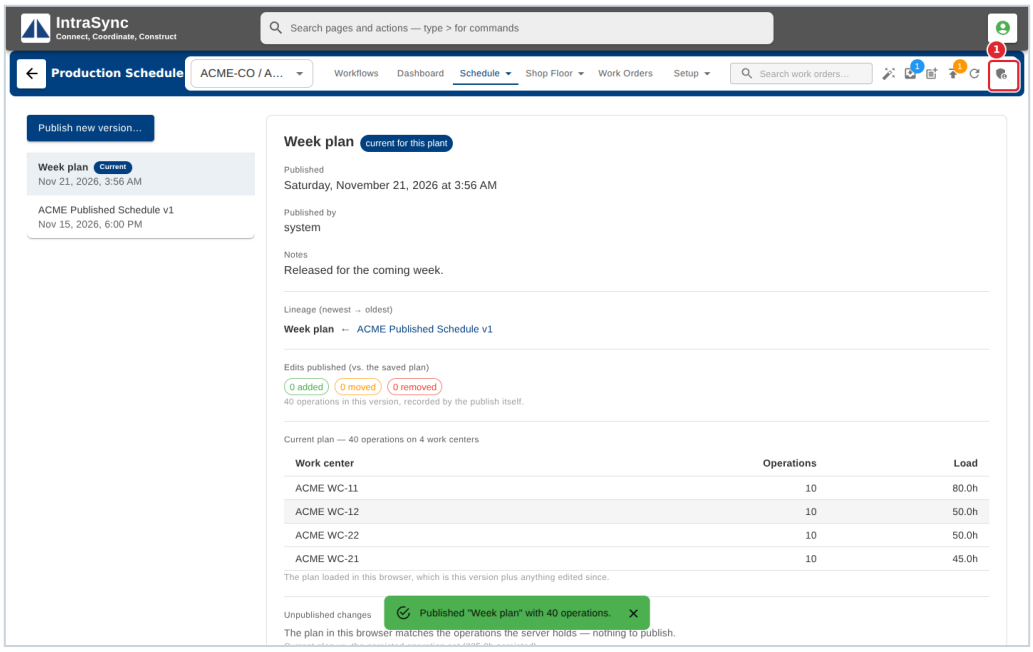
This is shown in the Production Schedule video at 1:09.

23. Check settings and reload data (administrators)

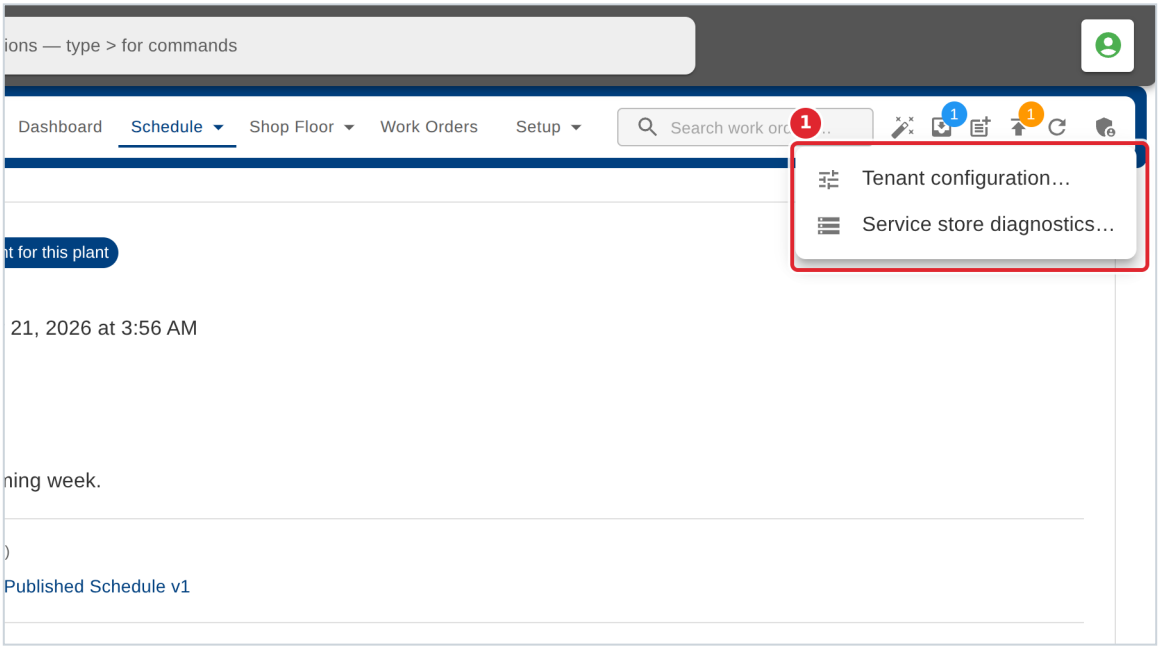
See the settings your system supplies to scheduling, and reload the schedule's data if a screen looks out of date.

Before you start:

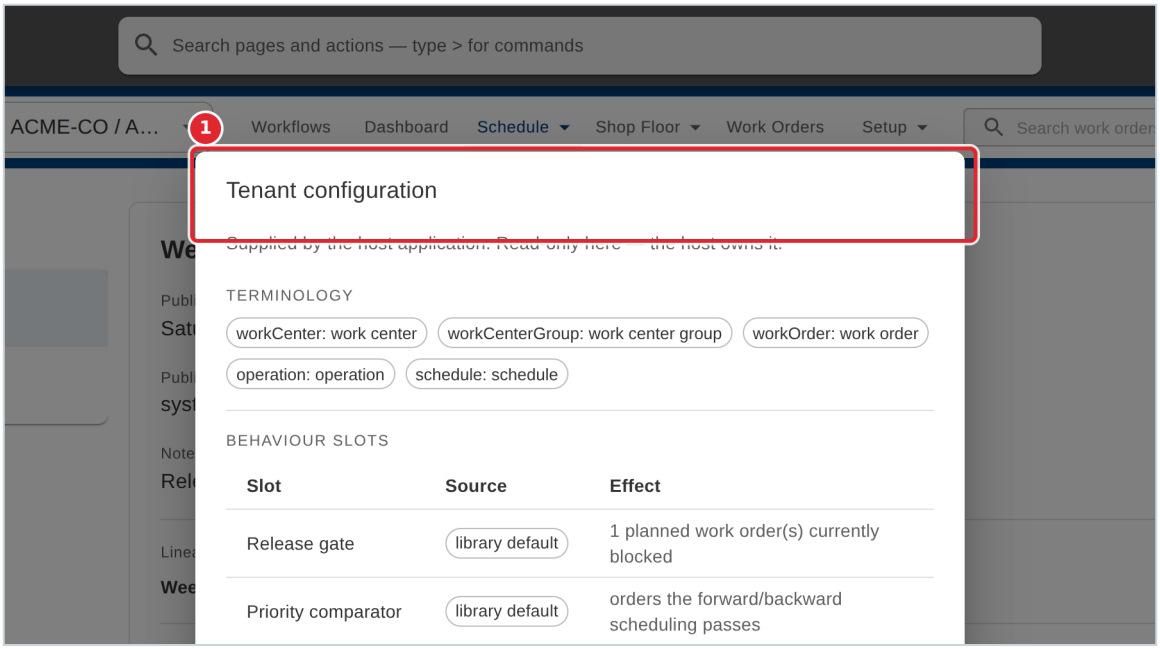
– The administration button is shown to administrators only.



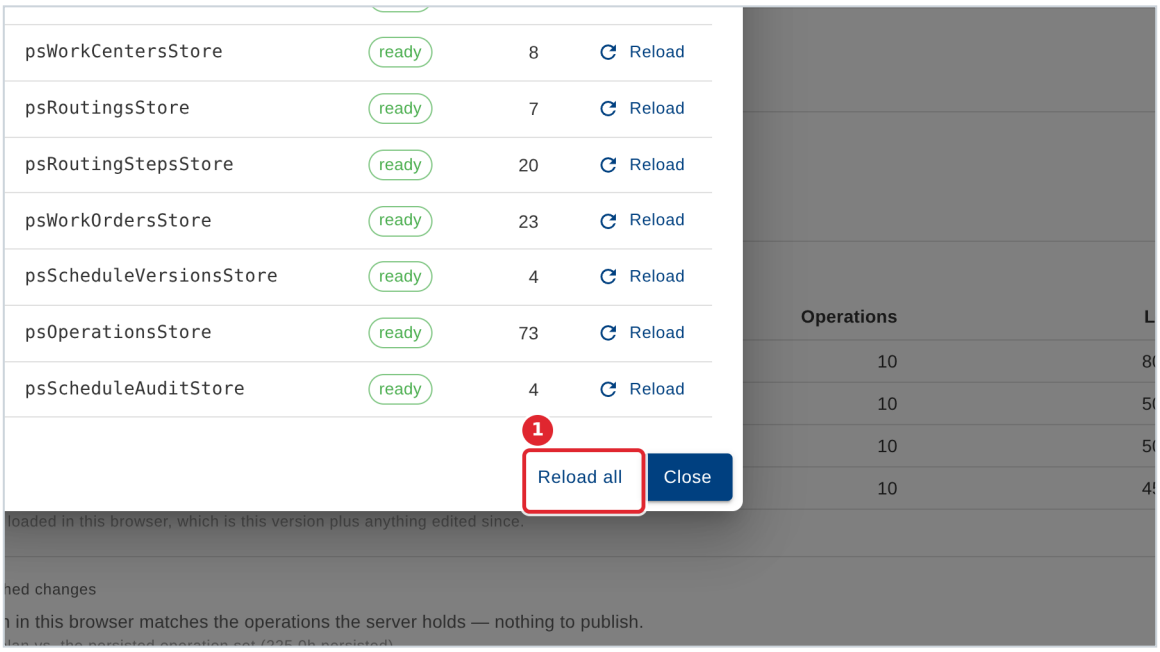
Step 1. Administrators: select the administration button at the far right.



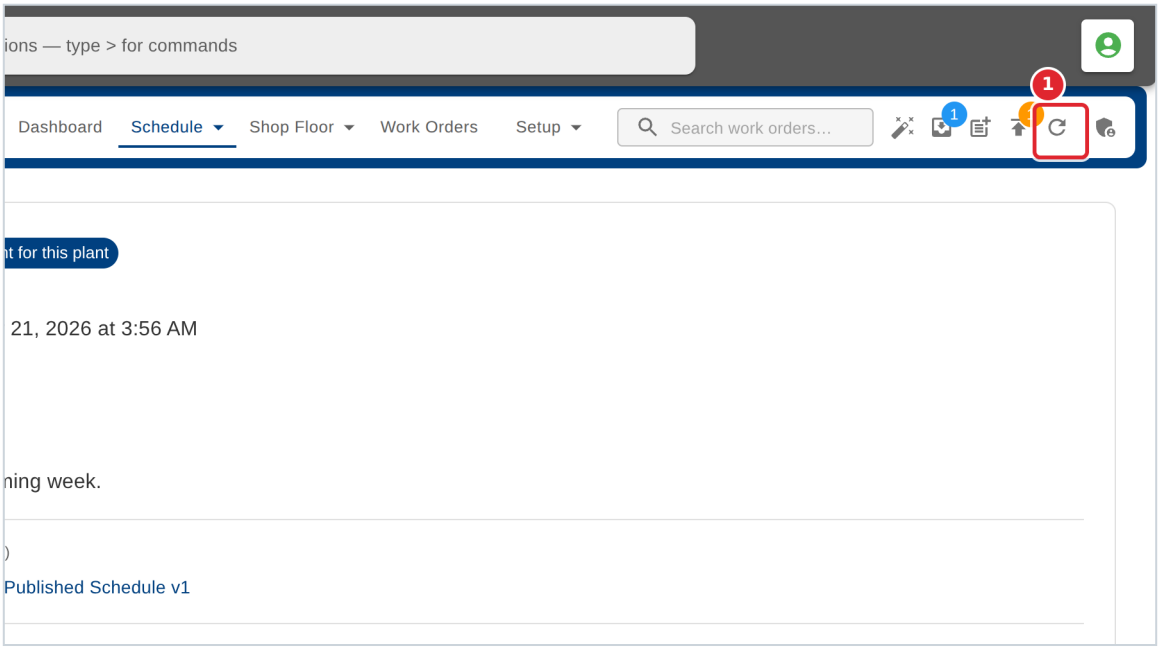
Step 2. Pick Tenant configuration or Service store diagnostics.



Step 3. Tenant configuration shows the settings your system supplies to scheduling. It is read-only here.



Step 4. Service store diagnostics reloads the schedule's data. Select Reload all if a screen looks out of date.



Step 5. Everyone can select Refresh to load the latest schedule data.

Tips:

- Tenant configuration is supplied by your system and cannot be changed here.

This is shown in the Production Schedule video at 1:47.

Glossary

- Work center: A place in the plant where work is done, with its own working calendar and capacity.
- Operation: One step of a work order's routing, placed on a work center for a time.
- Routing: The ordered steps a product goes through. A generic routing is for custom items with no product.
- Planning horizon: The range of plant days the schedule screens show and auto-schedule plans over.
- Release gate: Your system's check that a planned work order is ready to release. Orders that fail it are release blocked.
- Slack: A stored planning buffer between a work order's completion and its due date.
- Schedule version: A published record of one plant's plan: its name, time, publisher, predecessor and notes.