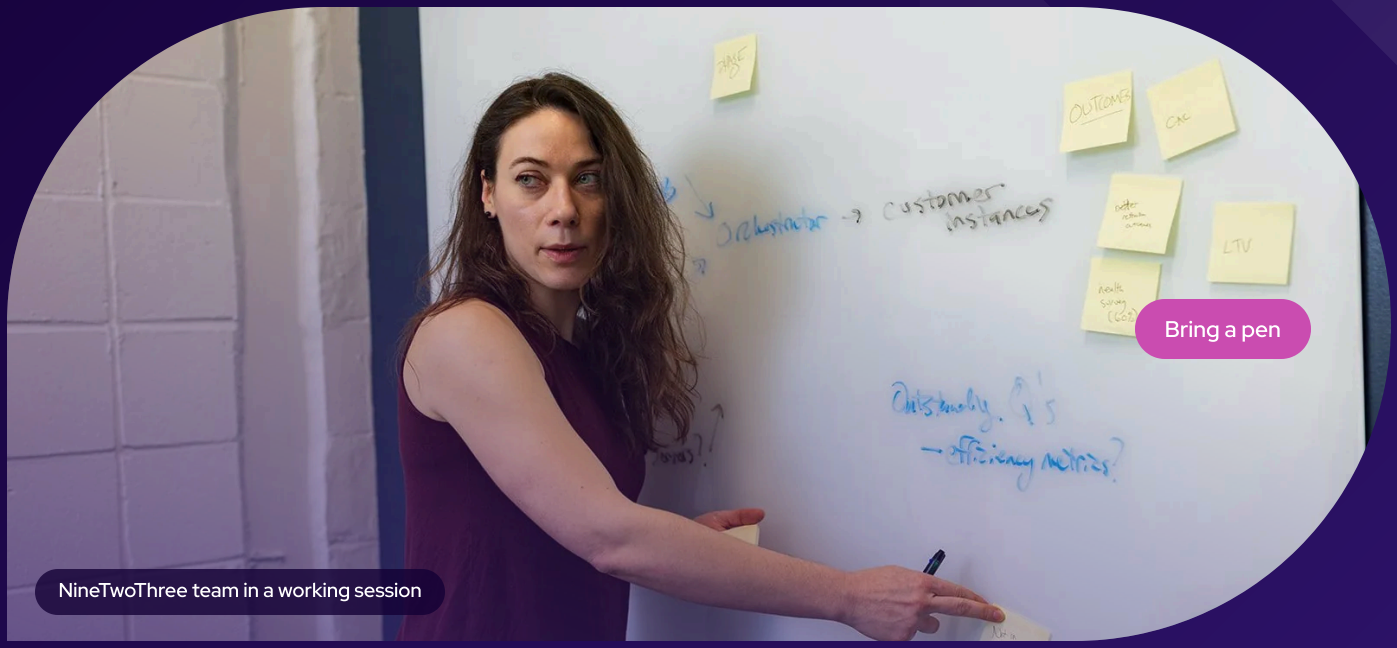
nine twothree




NineTwoThree team in a working session

OWNED INTELLIGENCE FOR INFOR · WORKBOOK

# The Shop Harness workbook

Worksheets for the sessions where your schedulers, estimators, quality leads and controller show where every answer lives, in SyteLine and around it. Print it and fill it in together.

Includes: session plan · six role capture sheets
Shop Map entry template · SyteLine cheat sheet · workflow scoring

NineTwoThree AI Studio
ninetwothree.co

BEFORE YOU START

# How to run a harness session

A harness session is a working conversation with one person about the questions they answer every week.

### Who

One person who answers questions all day, one facilitator, one note-taker.

### How long

60 to 90 minutes per session. Two or three sessions per role across four weeks, roughly two to five hours per person in total.

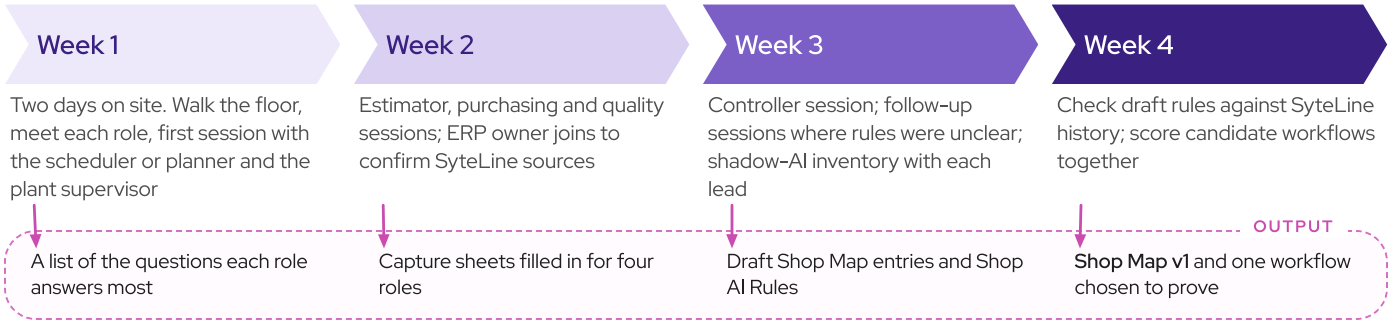
### Where

At their desk or workstation, with SyteLine open.

## Ground rules

1. Use their words. Write the question the way they say it, before translating it into system terms.
2. Follow the click path. Note every form, filter, export, spreadsheet and phone call it takes to reach the answer.
3. Ask why twice. The rule behind an answer usually comes out on the second "why".
4. Nothing is wrong. Workarounds are information. Nobody is being audited.
5. Keep personal and customer-confidential details out of the notes unless the rule needs them.

## Suggested four-week plan




NineTwoThree runs these sessions as the first stage of an engagement. You can also run them yourself with this workbook. The questions are the same either way.

## Scheduler or planner

NAME _____ DATE _____

- ? What do you check first every morning?
- ? What overrides a due date?
- ? Which standards do you not trust?
- ? How do you decide what runs next?
- ? Where does the real schedule live?
- ? Who calls you to pull an order in?

| QUESTION, IN THEIR WORDS | WHERE THE ANSWER LIVES TODAY | THE RULE BEHIND IT | RECORDS TO PROVE IT |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## Plant supervisor

NAME _____ DATE _____

- ? How do you know a job is behind?
- ? What happens when a machine goes down?
- ? What do you report at the morning meeting?
- ? What do you walk the floor to find out?
- ? How do you know which revision is running?
- ? What does a new lead ask you most?

| QUESTION, IN THEIR WORDS | WHERE THE ANSWER LIVES TODAY | THE RULE BEHIND IT | RECORDS TO PROVE IT |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## Estimator

NAME _____ DATE _____

- ? Which past jobs do you look at first?
- ? What do you add for a new customer?
- ? When do you decline to quote?
- ? When do you trust the routing standard?
- ? Which materials do you always pad?
- ? What would a new estimator get wrong?

| QUESTION, IN THEIR WORDS | WHERE THE ANSWER LIVES TODAY | THE RULE BEHIND IT | RECORDS TO PROVE IT |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## Purchasing

NAME _____ DATE _____

- ? Which suppliers do you chase, and how?
- ? Which jobs does a late PO put at risk?
- ? Who needs to hear when a PO slips?
- ? How do you learn a PO will be late?
- ? Which parts stop a line when they're late?
- ? What lives in your own spreadsheet?

| QUESTION, IN THEIR WORDS | WHERE THE ANSWER LIVES TODAY | THE RULE BEHIND IT | RECORDS TO PROVE IT |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## Quality lead

NAME _____ DATE _____

- ? How does a revision change reach the floor?
- ? What do you pull together for an audit?
- ? How do you find the cause of repeat scrap?
- ? Where do nonconformances get recorded?
- ? Which parts or customers need extra checks?
- ? What lives in a binder or a shared drive?

| QUESTION, IN THEIR WORDS | WHERE THE ANSWER LIVES TODAY | THE RULE BEHIND IT | RECORDS TO PROVE IT |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

## Controller

NAME _____ DATE _____

- ? Which question takes you longest to answer?
- ? Which reports do you rebuild every month?
- ? What do you export from SyteLine to Excel?
- ? Where do quoted and actual margin split?
- ? Whose numbers disagree, and why?
- ? What does the owner ask you most?

| QUESTION, IN THEIR WORDS | WHERE THE ANSWER LIVES TODAY | THE RULE BEHIND IT | RECORDS TO PROVE IT |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |

AFTER EACH SESSION

# Turn each answer into a Shop Map entry

One entry per question. An entry is finished when the rule has been checked against real records and someone other than the person who taught it agrees it holds.

Shop Map · entry no. _____ DRAFT / CHECKED / VERIFIED

QUESTION

LIVES IN

THE RULE

TAUGHT BY

PROVED ON

POWERS

Shop Map · entry no. _____ DRAFT / CHECKED / VERIFIED

QUESTION

LIVES IN

THE RULE

TAUGHT BY

PROVED ON

POWERS

Proved on: the records and date range the rule was checked against. Powers: the views or agents that will use this entry.

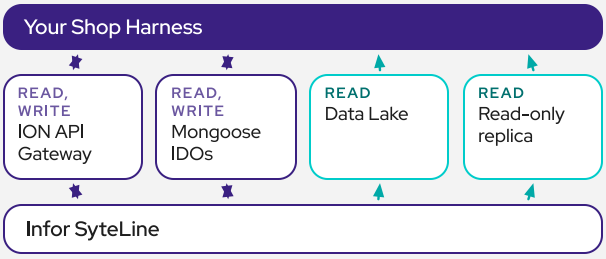
REFERENCE

# Where answers usually live in SyteLine

**Common examples; names vary by version, confirm in your system.** Ask your ERP administrator to confirm each source before it goes into the Shop Map.

| WHAT PEOPLE ASK ABOUT | TYPICAL SYTELINE FORMS | EXAMPLE IDOS | OFTEN ALSO LIVES IN |
|---|---|---|---|
| **Open jobs and due dates** | Job Orders | SLJobs | Scheduler's hot list, whiteboard |
| **Operations and work centers** | Job Operations, Work Centers | SLJobRoutes, SLWcs | Supervisor's notes, dispatch printouts |
| **Material for a job** | Job Materials | SLJobmatls | Picking lists, kitting spreadsheets |
| **Items and revisions** | Items, engineering change forms | SLItems | CAD or PLM, the print at the station |
| **Customer orders** | Customer Orders, Customer Order Lines | SLCos, SLCoitems | Email, phone notes from sales |
| **Purchasing** | Purchase Orders, Purchase Order Lines, receiving forms | SLPos, SLPoitems | Purchasing inbox, supplier portals |
| **Vendors and customers** | Vendors, Customers | SLVendors, SLCustomers | CRM, buyer's notes |
| **Labor and machine time** | Job labor and transaction forms | confirm locally | Shop-floor data collection, paper travelers |
| **Inventory on hand** | Item stockroom and location forms | confirm locally | Cycle-count sheets |
| **Estimates and quotes** | Estimate forms | confirm locally | Estimator's spreadsheets, past quotes |
| **Schedule and capacity** | APS and planning forms | confirm locally | The real schedule in Excel |
| **Quality records** | Quality module forms, if licensed | confirm locally | QMS, binders, inspection sheets |

## How the owned layer reaches these




Writes always go through IDOs, so SyteLine's own rules apply. Nothing writes straight to the database.

## Don't skip the "also lives in" column

The unofficial source is usually where the rule lives. A Shop Map entry that names only the SyteLine form will miss the reason the answer is right.

END OF WEEK 4

# Score the candidate workflows together

List every workflow that came up in the sessions. Score each one with the leads in the room. Pick the one you can prove fastest, then decide what happens to the rest.

| WORKFLOW | HOW OFTEN IT RUNS (1 TO 5) | PEOPLE WHO TOUCH IT (1 TO 5) | COST MEASURABLE TODAY (Y / N) | HAS A RIGHT ANSWER (Y / N) | DATA REACHABLE TODAY (Y / N) | DECISION |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

## How to read the scores

- Three Y answers plus high frequency: a strong first candidate
- No measurable cost today: measure it for two weeks before deciding
- No right answer: keep a person deciding, and give them better information
- Data not reachable: fix access first, or wait

## The four decisions

**Buy** a product you own or can buy already does it

↓

**Simplify** a process change fixes it

↓

**Build** it depends on how your shop works and it pays back

↓

**Wait** not yet, with a date to look again

## Want help running the sessions?

Book a Shop Walk at ninetwothree.co. In 45 minutes we trace one real question with you.

Book a Shop Walk

Infor, CloudSuite Industrial, SyteLine, ION and Mongoose are trademarks of Infor. NineTwoThree is an independent company and is not affiliated with or endorsed by Infor.
Copyright © 2026 923 Digital, LLC.