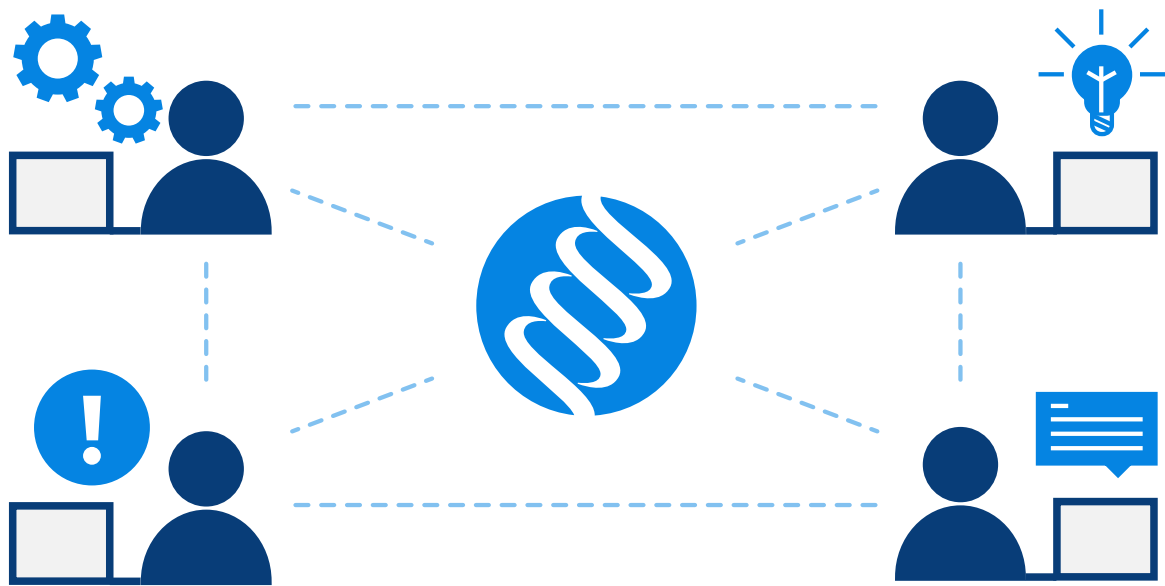


# Manage Your Inventory Operations Remotely with LeanDNA



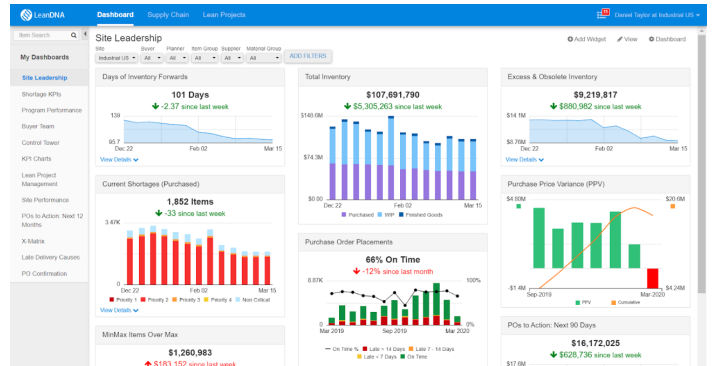
The LeanDNA team is here to support your business in the coming weeks and months, as global teams shift to remote-work arrangements in the interest of health and safety

Below are a few ways LeanDNA can help your team collaborate effectively when you can't meet face-to-face.

# 1

## Standardize Workflows and Remote Meetings with Dashboards and Saved Report Views

For daily or weekly remote video conference calls, help everyone refer to the same data by aligning your teams around a set of [standardized dashboard views](#). Identify the critical set of widgets each stakeholder should review in the remote meeting. This could be certain widgets for managers, a different set for buyers, and another set for analysts. The key is for everyone to standardize their widgets and the order of review so you can make the most of your time in remote meetings.



Use [My Views](#) to customize and save the reports that are most important to you so you have them at your fingertips in recurring remote meetings. This lets you standardize the way you're reviewing metrics at each recurring check-in and helps all the key players work from a consistent data set. For example, customize and save your shortage report with the filters and columns set for review with a specific supplier or customer, or for your remote team's regular internal review.

LeanDNA Dashboard Supply Chain Lean Projects Jeff Paal at Industrial US

Item Search

### Shortage Report - Weekly Customer Review

EXPORT TO EXCEL | MORE...

Item Code	Criticality Level	First Purchase Order	First PO Supplier	First PO Requested Date	First PO Status	Excess at Other Sites	Task Status	Task Subject	Task Category	Task Responsible	Task Due Date	First Impacted Order
TN742675-101 : PLATE, ...	Priority 2	1 EA Planned	1 EA Planned	1 EA Planned	1 EA Planned		Open	Critical Shortage	Critical Shortage	Jeff Paal	Apr 16, 2020	TL15-016-01F
TA71000715 : GASKET, ...	Priority 2	4500088687-10:0001 (12 EA)	CONTAINERCAR...	May 14, 2020	Global sourcing team is wo...		Open	Shop Floor sho...	Critical Shortage	Julie Bailey	Mar 18, 2020	3871200F06001-3...
PI720049-N0002 : FITTIN...	Priority 2						Open	We need to pla...	Critical Shortage	Daniel Taylor	Apr 15, 2020	BG-830L-BC-LOA...
RT9WP56311-007 : LEN...	Priority 1	4500091292:20:0001 (3 EA)	ATTEWELL LIMITED	Mar 17, 2020	Order is now past due. Sup...	10	Open	Expediting PO	Critical Shortage	Lauren Knobloch	Apr 16, 2020	-
512-030-400-602 : SIDE ...	Priority 2	4500070308-30:0005 (1 EA)	BOEING	Jan 27, 2019			Open	Place PO asap	Critical Shortage	Brandon Reed	Apr 16, 2020	-
RT9LM50917-005 : HOO...	Priority 2						Open	Status with Su...	Critical Shortage	Lauren Knobloch	Apr 16, 2020	1159W52508-523/...



# 2

## Prioritize and Simplify Daily Work with the Buyer Dashboard

ADD FILTERS

### My Current Shortages

**55 Items**  
↑ 4 since last week

Supply Status	Count
Has Firm Supply	48
Has Planned Supply	2
No Supply	5

### My PRs to Firm

**74 PRs to firm**  
67 late PRs

PR Status	Count
Inside Lead Time (14+ days old)	58
Inside Lead Time (7-14 days old)	2
Inside Lead Time (<7 days old)	10
Inside Procurement Lead Time	4

### My Procurement Tasks

**5 Open Tasks**

Item Code	Subject	Due Date
● PAR8D9333-523	Move PO Forward	in 10 days
● PAR8D8333-001	Expedite PO	in 10 days
● 7D0268D0175G	Move PO earlier	in 10 days
● RT9WM53482-011	Supplier Update	in 10 days
● RT9CSS4104-37BE	Under Min - Need Delivery Schedule	in a month

[VIEW REPORT](#)

### My Inventory Actions

**\$294,354 Potential Savings**

Item Code	Potential Savings	Due Date
● PI754022-004	\$265,325	tomorrow
● TA2236554	\$29,028	in 3 days

[VIEW REPORT](#)

For buyers, working remotely can make it even more challenging to know which tasks to knock out first each day. Use the [Buyer Dashboard](#)—now added to every buyer’s list of dashboards—to focus your daily workflow on the most critical items first. This dashboard is pre-configured with all the filters relevant to you and your work, so you don’t have to spend time setting it up or customizing it. It includes widgets that surface the top inventory reduction and shortage management actions for your items. You can rely on this resource to simplify and focus your efforts in stressful times.



# 3

## Track Results with the Buyer Performance Dashboard

LeanDNA Dashboard Supply Chain Lean Projects

Item Search

Buyer Performance

Site: Industrial US

Buyer	↓ On Hand Inventory	90 Day Change On Hand Inventory	90 Day E&O On Hand Change	Current Shortages	90 Day Change Shortages	Excess to Sell	PRs Inside Lead Time	Last Access
Janet Rose	\$9,422,278	↓ \$7,816,987	↓ \$354,207	33	↓ 2	\$0	8	
Carol Moore	\$4,250,172	↓ \$2,461,002	↓ \$2,382,697	3	↑ 2	\$91,325	2	Yesterday
Steven Hunter	\$3,794,831	↑ \$53,425	↓ \$26,032	56	↑ 3	\$1,114		945 days ago
Frances Richards	\$3,725,975	↓ \$471,152	↑ \$6,462	95	↑ 29	\$17,852	25	Yesterday
Charles Chapman	\$3,031,145	↑ \$1,089,956	↓ \$613,199	33	↓ 29	\$0	13	
Eugene Nelson	\$2,857,571	↓ \$105,721	↑ \$12,647	24	↑ 1	\$0	48	Yesterday
Ronald Hunter	\$2,826,352	↓ \$1,645,265	↑ \$75	27	↑ 14	\$400	12	Yesterday
Brandon Reed	\$2,238,702	↓ \$521,655	↓ \$32,782	16	↑ 1	\$0	11	Yesterday
Michael Baker	\$2,180,112	↑ \$442,637	↓ \$86,599	72	↓ 109	\$0	86	Yesterday
Paul Grant	\$1,776,527	↓ \$567,215	↓ \$47,796	27	↓ 5	\$451	9	Yesterday
Julie Olson	\$1,580,152	↓ \$469,737	↓ \$223,552	19	↓ 17	\$116	5	
Christina Castillo	\$1,504,757	↓ \$334,198	↓ \$79,946	96	↓ 75	\$0	13	
Brandon Wheeler	\$1,366,159	↓ \$104,496	↓ \$222,880	240	↓ 143	\$0	41	Yesterday
Roger Rose	\$1,271,798	↓ \$396,694	↑ \$261,575	94	↓ 250	\$0		Yesterday

If you're a procurement manager or team lead, use the [Buyer Performance dashboard](#) to keep a pulse on which team members need additional support or mentoring while everyone's working remotely. The dashboard makes it simple to track business results, wins, and risks across your procurement team, and can highlight instances where buyer workloads could be rebalanced.



# 4

## Manage Accountability with Procurement Tasks

**Procurement Tasks**

Site: Industrial US | Responsible: My Tasks (Jeff Paal) | Task Status: Open, Review Later | [ADD FILTERS](#)

Task Status	Item Code	Site	Subject	Description	Category
● Open	ITM-725000100661 : ACS-M...	Industrial US	PO to Action	Please escalate with...	PO to Action
● Open	17B8D8294-503 : BEARING	Industrial US	High Prio	High priority for CAT	Critical Shortage
● Open	B001232W01030-7 : RIB, WI...	Industrial US	Physical invent...	Can you please cycl...	Priority 3
● Open	196-22710-002 : INTERCOS...	Industrial US	Inaccurate BOM	Update BOM, shorta...	BOM

When working in distributed teams, accountability is crucial. Incorporate **Procurement Tasks** into team workflows to keep activities moving forward while team members are working remotely. Assign owners, categories, and due dates to critical items related to excess or shortages. Note that procurement tasks are already incorporated directly into all of our reports, including our **Shortages By Item** report.

**Shortages By Item - Standard Work (Buyer)**

Site: Industrial US | Item Type: Purchased | Task Category: Critical Shortage | Priority 1, Priority 2 | Days in Shortage: Greater Than or Equal To 1 | [ADD FILTERS](#)

Item Code	Criticality Level	First Purchase Order	First PO Supplier	First PO Requested Date	First PO Status	Excess at Other Sites	Task Status	Task Subject	Task Category	Task Responsible	Task Due Date	Current Shortage	Mar 22, 2020	Mar 29, 2020	Apr 5, 2020	Apr 12, 2020	Apr 19, 2020
TN742675-101 : PLATE...	Priority 2						● Open	Critical Shortage	Critical Shortage	Jeff Paal	Apr 15, 2020	-1	-1	-1	-1	-1	-1
TA71000715 : GASKET...	Priority 2	4500088687:10:0001 (12 EA)	CONTAINERCAR...	May 14, 2020	Global sourcing team is wo...		● Open	Shop Floor sho...	Critical Shortage	Julie Bailey	Mar 17, 2020	-2	-4	-4	-4	-4	-4
P1720049-N0002 : FITTING...	Priority 2					1	● Open	We need to pla...	Critical Shortage	Daniel Taylor	Apr 14, 2020	-1	-1	-1	-1	-1	-1
RTW9P58311-007 : LEN...	Priority 1	4500091292:20:0001 (3 EA)	ATTEWELL LIMITED	Mar 17, 2020	Order is now past due. Sup...	10	● Open	Expediting PO	Critical Shortage	Lauren Knobloch	Apr 15, 2020	-1	3	3	0	0	0
512-030-400-602 : SIDE...	Priority 2	4500070308:30:0005 (1 EA)	BOEING	Jan 27, 2019			● Open	Place PO asap	Critical Shortage	Brandon Reed	Apr 15, 2020	-1	0	0	0	0	0
RTLMS0917-005 : HOO...	Priority 2						● Open	Status with Su...	Critical Shortage	Lauren Knobloch	Apr 15, 2020	-1	-1	-1	-1	-1	-1



# 5

## Adapt to Demand Changes with Inventory Actions

Status	Item Code	Site Name	Potential Value	Created Date	Supplier	Responsible	Last Commenter	Last Comment Date	Last Comment
O...	PI754022-004 : TRACK B ASSY, WIN...	Industrial US	\$265,325	Mar 16, 2020	NUTEK AERO...	Brandon Whe...			
O...	PI754011-004 : JOINING ASSY, TRA...	Industrial US	\$224,278	Mar 4, 2020	NUTEK AERO...	Brandon Wheeler			
O...	PI720621-103 : DOOR, LOWER MID,...	Industrial US	\$205,166	Mar 4, 2020	MS ELECTRO...	Asad Bhatti	LeanDNA Bot	Mar 7, 2020	The user Charl...
O...	PI720532-103 : DOOR, UPR MID AFT...	Industrial US	\$204,690	Mar 4, 2020	MS ELECTRO...	Andrew Hong	LeanDNA Bot	Mar 7, 2020	The user Charl...
O...	PI754032-004 : TRACK C ASSY, WIN...	Industrial US	\$168,330	Feb 26, 2020	NUTEK AERO...	Brandon Wheeler			
O...	PI720521-103 : DOOR, LWR MID, LH	Industrial US	\$153,874	Feb 26, 2020	MS ELECTRO...	Julie Austin	LeanDNA Bot	Mar 7, 2020	The user Charl...
O...	PI720532-104 : DOOR, UPR MID AFT...	Industrial US	\$153,517	Feb 26, 2020	MS ELECTRO...	Julie Austin	LeanDNA Bot	Mar 7, 2020	The user Charl...
O...	ITM-000050002819 : GMS4020-T/35,...	Industrial US	\$148,008	Feb 26, 2020	CANNON ELE...	Kenneth Morrison			
O...	TA2236554 : SHEET	Industrial US	\$29,028	Mar 12, 2020	BODYCOTE (S...	Brandon Reed	Richard Lebovitz	Mar 17, 2020	Unable to Fix: ...
O...	3671230E01005-3-901 : HARNESS A...	Industrial US	\$9,927	Mar 4, 2020	LAVENDER IN...	Brandon Reed	LeanDNA Bot	Mar 12, 2020	Min/Max has c...

As demand becomes more volatile, consistently using LeanDNA [Inventory Actions](#) will help your distributed team proactively stay on top of prioritized adjustments to supply and ERP replenishment settings. Manage accountability by using the Responsible column to assign an action’s owner, and use comments to add additional context when needed. Your team can update an action’s status in-line, by using the Last Comment column.

For more best practices on working in LeanDNA remotely, [email customer success \(customersuccess@leandna.com\)](mailto:customersuccess@leandna.com) or reach out directly to your dedicated customer success engineer. Our team is here to help however we can.

