

Production Floor SOP Guide

Use this as the floor operating standard for operators, leads, and managers once jobs are on the schedule.

Generated 2026-10-19

Contents

- Purpose
- Core Rule
- Roles On The Floor
- Start-Of-Day SOP
- Before Starting Any Task
- Readiness Check
- Clock-In SOP
- During Task Execution
- Quantity Completion SOP
- Department Handoff SOP
- Printing Department SOP
- Laminating Department SOP
- Cutting Department SOP
- Handwork And Finishing SOP
- Packing SOP
- Shipping SOP
- Pause And Problem SOP
- Rework SOP
- End-Of-Task SOP
- End-Of-Shift SOP
- Data Discipline Rules
- What Production Should Escalate Back To CSR Or Estimating
- Daily Management Review
- First-Principles Standard
- Production Command Center SOP
- Daily Material Requirements SOP
- Material Usage Capture SOP
- Inventory Discipline Rules
- Cycle Count SOP

Production Floor SOP Guide

This guide is for production managers, leads, operators, finishers, pack-out staff, and anyone on the floor using Excelsus IQ to run print work.

It is written as a standard operating procedure for print companies that want the schedule, task status, time tracking, and production handoff to stay clean.

Purpose

The purpose of this SOP is to make sure production staff:

- work from the scheduled job data
- follow the intended department sequence
- clock time correctly
- catch spec issues before production starts
- hand work off cleanly between departments
- close jobs with accurate actuals

Core Rule

The floor should run from the order and schedule, not from memory, hallway conversations, or scraps of paper.

If the screen and the floor disagree, stop and resolve that conflict before work proceeds.

Roles On The Floor

ROLE	MAIN RESPONSIBILITY
Production Manager	owns schedule, priorities, escalations, and re-sequencing
Department Lead	verifies readiness and handoff quality inside the department
Operator	runs assigned task, clocks time, updates progress, reports problems
Finisher / Handwork Staff	completes process tasks in sequence and reports exceptions
Packing / Shipping Staff	verifies quantity, packaging, labels, and shipment readiness

Start-Of-Day SOP

At the start of each shift:

1. review the schedule board
2. check overdue or blocked tasks
3. confirm today's priority jobs
4. confirm machine availability
5. confirm staffing and call-outs
6. confirm material readiness for priority work

The production manager should identify any jobs that are:

- due today
- rushed
- blocked
- missing stock
- waiting for proof or customer clarification

Before Starting Any Task

Before an operator starts a task, confirm:

1. this is the correct job
2. this is the correct item
3. this task is ready in sequence
4. required material is available
5. dimensions and quantity make sense
6. the machine or process matches the task

Do not start work just because the job is physically nearby. Start it because the task is ready and correct.

Readiness Check

If any of these are unclear, stop and escalate:

- missing stock
- wrong stock
- missing art or proof status
- wrong quantity
- wrong version count
- wrong finishing path
- wrong due date priority

Clock-In SOP

Operators should clock into the actual scheduled task they are starting.

Clock in when:

- setup work begins
- production work begins
- finishing work begins

Do not wait until the middle of the run. Setup time is part of the real task cost and schedule impact.

During Task Execution

While running a task:

- stay on the assigned job unless re-prioritized by the lead or manager
- record issues immediately
- monitor quality continuously, not only at the end
- stop if the job is clearly wrong or unsafe to proceed

Quantity Completion SOP

When pausing or finishing a task:

- enter quantity completed accurately
- do not guess if actual count is available
- if spoilage matters, communicate it to the lead or manager immediately

Bad quantity actuals create bad schedule and costing data for the rest of the job.

Department Handoff SOP

When one department finishes and another will take over:

1. confirm quantity completed
2. confirm job materials stay with the job
3. confirm any special instructions are visible
4. confirm the next department is not blocked by a missing piece

Examples:

- Printing to Laminating
- Laminating to Cutting
- Cutting to Handwork
- Handwork to Packing
- Packing to Shipping

The handoff is not complete until the next department can act without guessing.

Printing Department SOP

Before printing:

- verify substrate
- verify size
- verify print orientation or sidedness
- verify version count if applicable
- verify artwork release or proof status
- verify machine assignment

During printing:

- monitor first output carefully
- watch for color, banding, registration, or media-feed issues
- stop if output is clearly not saleable

After printing:

- stage prints cleanly for the next step
- label or separate versions if needed
- do not mix versions

Laminating Department SOP

Before laminating:

- verify the correct laminate type
- verify finish
- verify cure or wait time if the shop requires it
- verify the correct item count

During laminating:

- watch silvering, skew, bubbles, and edge issues
- stop if the film or output is not acceptable

After laminating:

- keep work identified by item and version
- protect edges and surfaces before handoff

Cutting Department SOP

Before cutting:

- verify the correct file or cut path
- verify the correct material stack
- verify quantity and version separation
- verify whether cut tolerance matters for the product

During cutting:

- inspect first-piece accuracy
- do not continue a bad cut path because the machine is already running

After cutting:

- count usable output
- separate remakes or defects
- send only acceptable pieces forward

Handwork And Finishing SOP

For handwork tasks such as:

- grommeting
- hemming
- taping
- assembly
- kitting
- packaging preparation

Confirm:

- count is correct
- orientation is correct
- finishing instructions are present
- all required accessories are available

Packing SOP

Before packing:

- confirm finished quantity
- confirm all versions or item groups are included
- confirm accessories are included
- confirm packing standard for the customer

Packing errors are customer-facing errors. Treat this as a quality gate, not as an afterthought.

Shipping SOP

Before shipping:

- confirm the job is truly complete
- confirm packaging is correct
- confirm labels or shipment references are correct
- confirm any will-call or delivery instructions are correct

Do not mark work as ready to ship if it is still waiting on:

- missing quantity
- missing hardware
- missing paperwork
- pending rework

Pause And Problem SOP

Pause work and escalate when:

- material is wrong
- quantity is wrong
- art is wrong
- cut path is wrong
- machine output is unacceptable
- next step is unclear
- due date priority changed

The correct behavior is to stop a bad job early, not to finish a bad job quickly.

Rework SOP

If a task needs rework:

1. notify the lead or manager
2. identify the cause
3. separate rework from good output
4. do not silently pass defects to the next department

The team should know whether the problem came from:

- data or quoting
- material
- machine output
- operator error
- finishing damage

End-Of-Task SOP

At the end of each task:

1. clock out or pause correctly
2. enter quantity completed
3. add notes if something important happened
4. confirm the next department is not blocked unnecessarily

End-Of-Shift SOP

At the end of each shift:

- close active time entries unless instructed otherwise
- stage in-progress jobs safely
- identify jobs that are blocked
- identify jobs that need priority tomorrow
- leave machine and work area in proper condition

The production manager or lead should review:

- open in-progress tasks
- overdue tasks
- blocked tasks
- jobs that are short of due-date expectations

Data Discipline Rules

The floor should follow these rules every day:

1. always clock into the real task
2. always update quantity honestly
3. never mark complete if the job still needs work
4. never skip reporting a problem because it seems small
5. never pass unknown work to the next department

What Production Should Escalate Back To CSR Or Estimating

Escalate when:

- customer-facing specs do not match physical reality
- the quote missed a major finishing step
- quantity or versions do not match the production need
- material selected is not appropriate
- due date expectation is unrealistic

Production should not quietly absorb those mistakes forever. The system only improves if those issues are fed back to the people who set the job up.

Daily Management Review

At least once per day, production leadership should review:

- rushed jobs
- unscheduled tasks
- blocked tasks
- overdue work
- jobs with heavy rework
- jobs with missing time entries

First-Principles Standard

The floor should be able to answer **yes** to these questions at any time:

1. Do we know what to run next?
2. Do we know whether the current task is actually ready?
3. Do we know who is working on it?
4. Do we know how much is done?
5. Do we know what the next department needs?

If the answer is **no**, stop and clean up the workflow before the confusion spreads.

Production Command Center SOP

The main dashboard is now a shared production command screen, not just an office summary page.

Supervisors, leads, CSR, and management should use:

- [Dashboard](#)
- [Orders Due Today](#)
- [Orders Due Tomorrow](#)
- [All Orders](#)
- [Production Meeting](#)

The [Production Meeting](#) screen is the meeting-safe view for the 9:00 AM review.

Use it to review:

- all orders due today
- all orders due tomorrow
- blocked jobs
- jobs waiting on proof, files, or customer action
- jobs with pinned or important internal notes

These operational screens now show two statuses together:

- order lifecycle status
- live production status

Read them differently:

- order lifecycle status tells you where the full order stands commercially and operationally
- production status tells you what process the floor is actually in right now

Example:

- [Order In Production](#)
- [Production Printing In Progress](#)

That is intentional. Production should not rely on only the broad order status when deciding what to do next.

Process-Linked Status SOP

Production status is now tied to tracked production processes.

This means:

- printing tasks should surface printing statuses
- finishing tasks should surface finishing statuses
- shipping-related tasks should surface shipping statuses

Managers and owners configure the shop-facing production statuses in:

- [Settings > Production > Process Statuses](#)

Floor staff should not manually reinterpret those labels. If a label is wrong, fix the process-status mapping instead of creating local workarounds.

NCR SOP

The system now includes NCR tracking for real quality events.

Use NCRs when:

- work must be redone
- quality failure needs formal documentation
- cost impact must be captured
- root-cause analysis is needed

Do not use NCRs for:

- routine operator notes
- normal setup observations
- informal reminders that belong in production notes

Create an NCR from:

- the order
- the item screen
- the live work ticket

Production leads should review NCR trends during the week, not only when a customer complains.

Daily Material Requirements SOP

The main daily material planning report is:

- [Inventory > Daily Requirements](#)
- direct route: </inventory/requirements>

This report should be reviewed every day by production leadership and purchasing.

Use it to answer:

1. What jobs need material today?
2. What jobs need laminate today?
3. What hardware is required for upcoming work?
4. What is allocated already?
5. What is still short on hand?

Each row shows:

- job number
- customer
- due date
- job / line description
- component type
- quantity needed
- unit of measure
- job allocated quantity
- inventory reserved quantity
- inventory on-hand quantity
- inventory available quantity

Material Usage Capture SOP

Material usage entry is now part of inventory accuracy.

Operators are required to record material usage on tasks where the machine or process is marked:

- Requires Material Usage Capture

This is configured in the Production Library on:

- machines
- processes

In practice, this is typically used for:

- print processes
- precut / cutting processes
- laminate-consuming finishing steps when the shop wants actual laminate usage recorded

When recording usage, the operator should enter:

- actual quantity used
- spoilage quantity
- notes if there was overrun or waste

If actual usage exceeds the reserved quantity, the system still deducts the overrun so stock stays honest.

Inventory Discipline Rules

Production should follow these rules:

1. Do not pull material without checking the allocation or requirement.
2. Do not leave material usage blank on capture-required tasks.
3. Record spoilage when it happens, not later from memory.
4. Use inventory adjustments for stock corrections instead of hiding the problem in task notes.
5. Escalate material shortages during the production meeting, not after the due date slips.

Cycle Count SOP

Inventory now supports cycle counts and count sheets.

Use cycle counts to verify:

- high-value material
- laminate
- frequently used stock
- material with repeated shortages

Cycle count workflow:

1. create the count
2. count the listed stock by location / bin / lot
3. review the variance
4. finalize the count and correct the inventory record