1. **Purpose**

Below explains how the PLANNED SCHEDULE is used. The planned schedule allows the supervisor to view 12 weeks of upcoming work for respective crews. This schedule allows the supervisor to see and schedule PMs that are in the queue for the upcoming weeks and balance the workload. In this way, flexing the work to the manpower can be managed, especially helpful when working around vacations, absences, holidays, etc.

2. **Navigating to the Planned Schedule**
   
   2.1 Select the role as “PM Schedule.” The planned schedule view is only available the role of “PM Scheduler” and “Equipment Coordinator.” If you require this visibility, contact your supervisor to obtain the authorization and paperwork.
   
   2.2 Double click on the “Planned Schedule.” The form, Planned Schedule, will pop-up requesting additional information.
   
   2.3 Type in the starting date and the Crew
   
   2.4 Click Create Schedule.
2.1. Select Role as PM Scheduler or Equipment Coordinator.

2.2. Double click on the “Planned Schedule.”

2.3. Type in the starting date and the Crew

2.4. Click Create

2.5. The screen will look like the following.

2.5.1. First column, Date, shows the next 12 weeks worth of work.

2.5.2. WO is the current work orders(trouble tickets) for the respective crews for that week. The 27 is estimated man-hours only. Man-hours are shown only if it is set up in the Prev Maint work orders. At this time only a few of the Preventive Maintenance procedures and all routes have man-hours setup. For the most part, ignore the WO column.
2.5.3 PM column is a schedule of the Preventive work orders that are **scheduled** to be generated. All Routes have estimated man-hours assigned for the work.

2.6 By clicking into the week and click “show detail,” it is possible to see the details for that respective week.

2.7 Then click, “View Equipment PMs.”
2.8 The Equipment PM form opens displaying the what is scheduled for that respective week. These are only what will be scheduled for that week; these are NOT open work orders, yet.

3. **Equipment Form Details**

3.1 There is a tremendous amount of detail to be gained for this screen. These details will be described by columns and how they relates to other information and items in FAMIS.

2.4. Estimated Hours **per** piece of equipment, which results in the total hours.

3.2. Equipment

EQ = single piece of equipment
098 or RTE = Route of many of the same equipment, may be other names as well.

3.3. PM number & Description
3.2 Equipment: This is the list of Equipment schedule for PMs. Items starting with EQ are a single piece of equipment. Items starting with a 098 are a Route. Routes are made of the same type of equipment in the same building.

3.3 PM Number & Description: The first and third columns are the task list that are setup in FAMIS. It is only the PMI number and its respective title. The EQ and/or Route have been setup to use this PM task list. (see pic below)

3.4 Est Hrs: This is the Estimated Hours per piece of equipment or per Route of Equipment.

- EQ of a single Supply Fan = .25 hours
- Route of 24 EQs of Supply Fans = .25 X 24 which is 6 hours total

Both the PM description and the estimated time comes from the setup of the PM instruction for Labor Resources. If the time estimate for a particular Route is not accurate, please contact your respective Planner/Schedulers to make that change the specific Route.

The following are examples of both the single equipment and a route of equipment(s).

**Single Equipment:** For EQ014334, it is estimated for this single EQ# to take 15 minutes (.25).

**Route of Equipment:** However, if there are 24 Supply Fans on a Route, example 098 MAI FS (Supply Fans in MAI), it is ¾ hour per fan for a total of 18 hours for the entire Route.

3.5 Scroll Bar: Notice the scroll bar are the bottom. There is more information to be seen on this view. Move the scroll to the other side.
**Note:** This *Next PM Date* can be changed in this screen (figure 1). It is the same as if making a change in the Equipment Route form (figure 2). Notice the date for Route Id, “098 GEB FS,” both show a next PM date of Oct. 2, 2015.

![Figure 1: Planned Schedule Form](image1)

![Figure 2: Equipment Route Form](image2)
4. Balancing the Work Load / Changing the Next Due Date.

There are multiple ways to see these dates; this document only describes it from the planned schedule perspective. 154.2 man-hours may seem too high when there is only 40.75 man-hours the week prior, it might be possible to move some work forwards or backwards to balance the work load. This section of the SOP will show how to change the dates on the following PMs:

- Show the planned schedule and changes
- Change dates on a Route of Equipment
- Change date on a single piece of Equipment

4.1 Show your planned schedule.

4.1.1 Click into the week where the details need to be seen. In this case, we highlighted the 154.2.

4.1.2 Then click Show Detail, the click View Equip PMs.
Up pops the following screen. The following PMs make up the 154.2 man-hours. It might be helpful to move a couple of Routes to a different week. The 3 routes outlined in RED, show 27 hours. Let’s move the 10 hours on route 098 UNB FB to the previous week.

![Equipment PM](image.png)

4.2 **Change the date in the Route PM.**

4.2.1 Right-mouse click on the Route ID. Scroll till you see the “Next PM date”, then highlight the data and replace it with your new date. In the example, we are moving it to the week starting Monday Sep 21, 2015.

![Equipment PM](image.png)

4.2.2 Change the data to Sep 21, 2015

4.2.3 Click “Ok.” The Planned Schedule will recalculate the times. Notice the 10 hours
Notice the hours have now changed to reflect the 10 hours changed from 154.2 to 144.2 and increased in the previous week.

5. Change date on a single piece of Equipment

Similarly, the date on a single piece of equipment can be changed. This process is not new but shown here to demonstrate the similarities of single/Route PMs and how they function the same way.

5.1 From the Planned schedule, click into the week and Show the details. (as shown in the sections above). From the list of equipment, select the single piece of Equipment. Recall the difference between the Route and single EQ.

5.1.1 Locate the Equipment record to change the date.

5.1.2 Scroll till you see the NEXT PM date.
5.1.3 Change the date to whatever week the PM needs to move to. In this case, we will move to the same SEP 21, 2015.

5.1.4 Click “ok” to accept the change. FAMIS again recalculates the PLANNED SCHEDULE to show the following. The time for has further decrease by the 4.5 hours moved into the SEP 21, 2015 week.
6. **Multiple Date changes to a week**

6.1 Multiple date changes can be made to a single week, by just making the changes to the **NEXT PM DATE**. Make the various date changes as per above and click ok. See the 4 changes in the example below:

![Image of PM History](image1)

6.2 See the changes below:

![Image of Planned Schedule](image2)
7. **Related desk instructions**

All work instructions are located on the [FAMIS Desk Instructions](#).

8. **Role Authorization**

Daily Scheduling functions require the following roles:

- UT Crew Supv

Contact worqs@austin.utexas.edu or at 512-232-5020 for more information on this role.

9. **Document Control**

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<th>Document Owner</th>
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<td>Darnell Mack</td>
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<td>Planned_Schedule_08-24-2015.docx</td>
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<td>8/24/2015</td>
<td>Darnell Mack</td>
<td>Updated for R2D2 update to FAMIS 8i in early 2015 which fixed the NEXT PM date change in the Planned Schedule form.</td>
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