

Schedule with Daily Scheduling

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1. Purpose

The Daily Schedule form is used to assign work orders to individual workers on a crew during a given day. This enables more efficient time reporting by workers, provides a more accurate view of the backlog per work order, and gives the scheduler the ability to view multiple daily schedules for upcoming days.

Select a specific crew prior to viewing and scheduling work orders. NOTE: If a user (supervisor) has more than one crew, a default crew that appears when the form is opened by the user can be designated in the Options tab-window (Version 8i only).

The following tabs are found in the Daily Schedule form:

Schedule	Displays scheduled work orders for a crew.
Backlog	Displays work orders that need to be scheduled.
Options	Provides options for viewing work orders in the Schedule and Backlog Tabs
Reports	Run reports based on the information found in the Daily Schedule form.

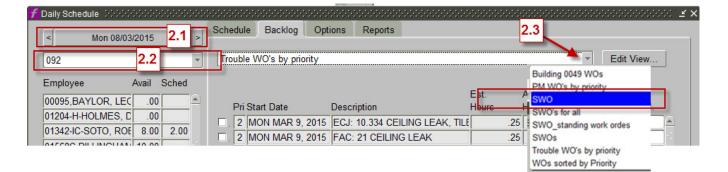
2. Backlog view to start scheduling

The Daily Schedule form is used to assign work orders to individual workers on a crew during a given day. Select the:

- 2.1 Date
- 2.2 Crew
- 2.3 Workbench view.

2.3.1 The workbench view can be changed by clicking the down arrow and selecting the next view. SWO – standing work orders; WOs – work orders; PM WO's – preventive maintenance work orders...

2.3.2 Custom work bench can also be created for personal bench views. See the procedure and link referenced at the end section. <u>Creating Custom Workbench Views</u>



3. Schedule a single work order for an employee

- 3.1 Select an employee.
- 3.2 In the Backlog Tab, select a work order.
- 3.3 Check the box to the left of the entry,
- 3.4 Enter the hours to be scheduled in the Hours To Sched. Field.
- 3.5 Press the Schedule button.

The <u>scheduled</u> hours will be adjusted accordingly, and the newly scheduled line will be displayed in green to flag this event. To see the scheduled work order, view the Schedule Tab.

NOTE: Any work orders scheduled for the current day or future days will be displayed in green.

Aline 000/000000000000000000000000000000000	Schedule Backlog Options Reports	
092	WOs sorted by Priority	▼ Edit View
	Est. Actual 3.1 Pri Start Date Description Hours Hours	Hours Hours To Remain Sched.
01204-H-HOLMES, C 00 01342-IC-SOTO, ROE 8.00 2.00 01568C-DILLINGHAV 10.00	4 FRI DEC 26, 2014 ANNUAL 000 I&C INSPECTION-F 72.00 4 WED JAN 14, 2015 ANNUAL 000 CARS ALARM POI 4.00	72 A
13989-HERRERA, JA .00 14230-IC-TRUESDEL 0.00	4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION-F 12.00 4 MON JAN 26, 2015 ANNUAL 000 I 3.2 SPECTION-F 16.00 4 MON JAN 26, 2015 ANNUAL 000 I 3.2 SPECTION-F 16.00 4 MON JAN 26, 2015 ANNUAL 000 I 3.2 SPECTION-F 32.00	2 16 32
14468-MW-BOLING, 10.00	4 MON JAN 26, 2015 ANNUAL 001 E SECTION-F 32.00 4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION-F 8.00 4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION-F 20.00	8
ANTU, XAVIER R 10.00 .25 ARBUCKLE, DEREK 10.00 CAMACHO, FRANK 10.00	4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION F 16.00 4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION F 20.00	16
CHAVARRIA, RICAR 10.00 DUTTINGER, JOHN / .00		12 8 52
Total 128.00 2.50	4 MON FEB 23, 2015 ANNUAL 000 I&C INSPECTION-F 36.00 4 MON FEB 23, 2015 ANNUAL 000 I&C INSPECTION-F 8.00	3.4 ³⁶ 8
Unscheduled Time 10.00 Selected Time 10.00	A MON FEB 23, 2015 3.5 JAL 000 I&C INSPECTION-F 12.00	12
Remaining Time .00	Schedule Milti-Schedule View History Simila	r WOs Conv to Proj

4. Schedule multiple employees to a work order or multiple days

The Multi-Schedule function allows the user to schedule the work for a range of dates for one or more employees. This is useful when employees perform work on the same work orders every day.

The number of the work order to be scheduled will appear at the top of the form. This number is carried over from the work order number that was highlighted when the form was accessed.

To schedule employees to the work order:

4.1 In the Backlog Tab, select a work order.

4.2 Click the button, Multi-schedule

Schedule 000000000000000000000000000000000000	Schedule Backlog Options Reports	
092 💌	WOs sorted by Priority	▼ Edit View
Employee Avail Sched	Pri Start Date Description Hours Hours	Hours Hours To Remain Sched.
01342-IC-SOTO, ROE 8.00 2.00 01568C-DILLINGHAN 10.00	4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION-F 20.00 4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION-F 12.00 4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION-F 12.00 4 MON JAN 26, 2015 ANNUAL 000 I&C INSPECTION-F 8.00	
13989-HERRERA, JA .00	4 MON FEB 23, 2015 ANNUAL 000 1&C INSPECTION-F 6.00 4 MON FEB 23, 2015 ANNUAL 000 1&C INSPECTION-F 52.00 4 MON FEB 23, 2015 ANNUAL 000 1&C INSPECTION-F 52.00	52 36
14468-MW-BOLING, 10.00 14553C-HOLUB, DA\ 8.00 .25 ANTU, XAVIER R 10.00 .25	4 MON FEB 23, 2015 ANNUAL 000 I&C INSPECTION.F 8.00 4 MON FEB 23, 2015 ANNUAL 000 I&C INSPECTION.F 12.00	8
ARBUCKLE, DEREK 10.00 CAMACHO, FRANK 10.00	4 MON FEB 23, 2015 ANNUAL 000 I&C INSPECTION-F 16.00 4 THU MAR 26, 2015 ANNUAL 000 I&C INSPECTION-F 12.00 4 THU MAR 26, 2015 ANNUAL 000 I&C INSPECTION-F 16.00	
CHAVARRIA, RICAR 10.00 DUTTINGER, JOHN / .00	.4 110 MAR 20, 2015 ANNOAL 000 IXC INSPECTION+F 10.00 .4 MON MAR 30, 2015 MTHLY- CONTROL SYSTEMS 2.00 .4 MON APR 27, 2015 MTHLY- CONTROL SYSTEMS 00	
Total 128.00 2.50	4 THU MAY 28, 2015 MTHLY- CONTROL SYSTEMS .00 4 FRI JUN 26, 2015 MTHLY- CONTROL SYSTEMS .00	0
Unscheduled Time 10.00 Selected Time 10.00	[4] TUE JUL 28, 2015 MTHLY- CONTROL SYSTEMS	
Remaining Time .00	Schedule Multi-Schedule View History Simila	ar WOs Conv to Proj

🔁 M	ulti-Schedule - 37352912	2 14144444					<) 로 치 ×]
1	Crew			4.3	Start Date	End Date	
	092			<	MON 08/03/2015 >	< MON 08/03/20)15 >
4.4				C			
	Employee A	Avail	Sched			_	
	00095, BAYLOR, LEC	.00	.00	<u> </u>	Use Resource Calendar?	×	
	01204-H-HOLMES, C	.00	.00		Hours To Schee	5.00)
	01342-IC-SOTO, ROI	8.00	2.00		Estimated Hours		
	01568C-DILLINGHAN	10.00	.00		Latimated Hours	12.00	
	13989-HERRERA, JA	.00	.00		Current Est. Hours	;	
	14230-IC-TRUESDEL	8.00	.00		Actual Hours	;	
	14468-MW-BOLING,	10.00	.00		Hours Scheduled	.00	
	14553C-HOLUB, DA	8.00	.25		Tiours Scheduled		
	ANTU, XAVIER R	10.00	.25		Hours Remaining	12	
	ARBUCKLE, DEDEK	10.00	.00		Future Scheduled Hours	.00	
	CAMACHO, F	10.00	.00		Crew Size	2	
	CHAVARRIA, RICAR	10.00	.00				
	DUTTINGER, JOHN	.00	.00	-	Crew Size Scheduled	1 0	
	Schedule	Canc	el				
	4.7						

The multi-schedule form is then displayed.

4.3 Select the Start Date and End Date for scheduling.

Each date button defaults to the current date or to the date indicated on the Daily Schedule form (if this form was called from there). This date can be adjusted forward or backward by selecting the arrow buttons to the right and left. Alternatively, press the date button and enter the date directly in the Change Daily Schedule Date popup window.

- 4.4 Select the crew to whom the work order should be scheduled.
- 4.5 Check the box next to the employee (or employees) to be scheduled.
- 4.6 Enter the number of hours to schedule for each employee selected and for each date in the specified date range.
- 4.7 Press the Schedule button to schedule the work order as designated.

5. Quick Scheduling of Work Orders from "Current Schedule"

The Quick Schedule function enables the user to schedule a work order with minimal keystrokes. When the form is called while highlighting a work order, the work order can be quickly scheduled by verifying the date, entering the number of hours and checking the employee(s) to be scheduled.

5.1 From "Current Schedule"

Ider Zone 2 - W	ork Orders						▼ Edit
						Pha	se
WO Number	Start Date	Ρ	Status	Building	Туре		Description
37354064	FRI FEB 20, 2015	4	OPEN	0297	MAINT		HMA: CX01 CONTROLLOR OFF LINE
37353970	FRI FEB 20, 2015	3	OPEN	0393	MAINT		MAI: CHANGE POINTS FROM DIASBLED TO EN
37353972	FRI FEB 20, 2015	3	OPEN	0227	MAINT		ECJ: CHANGE POINTS FROM DISABLED TO EI
37353840	THU FEB 19, 2015	4	OPEN	0257	MAINT		WCH: REPLACE VFD FOR AHU 003
3735 ^{Cut}	EB 12, 2015	4	OPEN	0185	MAINT		BMC: EMERGENCY POWER TEST
3735 Copy	EB 12, 2015	4	OPEN	0346	MAINT		KIN: EMERGENCY POWER TEST
3735 Paste	EB 12, 2015	4	OPEN	0561	MAINT		SER: EMERGENCY POWER TEST
3735 View/Edit.	EB 12, 2015	4	OPEN	0393	MAINT		MAI: REPLACE CONTROL VALVES ON INDUCT
2135 Quick Sch		4	OPEN	0605	MAINT		FAC: EMERGENCY POWER TEST
3734 <u>Close</u>	FEB 9, 2015	4	OPEN	0116	MAINT		RLM: 13.104 TAKE A FLOW READING ON HEX
3734 Cost Sum	mary FEB 9, 2015	4	OPEN	0116	MAINT		RLM: TAKE CHW FLOW ON FCU ROOM 2.204
3734 Print	FEB 9, 2015	4	OPEN	0116	MAINT		RLM: TAKE FLOW READING ON HEX ROOM 3.
37348716	MON FEB 9, 2015	4	OPEN	0116	MAINT		RLM: TAKE FLOW READING ON HEX ROOM 3."

- 5.2 Right-clicking on the WO Number field
- 5.3 Select 'Quick Schedule' from the right mouse click menu to call the "quick-schedule" form. See below.
- 5.4 Follow the steps at 4.3 4.7 to complete the scheduling.

f Current Schedule

• Facilities Services
- E

								Phase		
WO Number		Start Date	P	Status	s B	uilding	Туре			Description
37354064	FRI F	EB 20, 2015	4 (OPEN	0297		MAINT	HMA:	CX01 CONTROLLO	OR OFF LIN
37353970	FRI F	EB 20, 2015	3 (OPEN	0393		MAINT	MAI: C	HANGE POINTS F	ROM DIAS
37353972	FRI F	EB 20, 2015	3 (OPEN	0227		MAINT	ECJ: C	HANGE POINTS F	ROM DISA
37353840	THU	FEB 19, 2015	4 (OPEN	0257		MAINT	WCH:	REPLACE VFD F0	OR AHU 00
37350058	TH 💏	Quick-Schedule	- 37353	3972 Here						া র স ×া
37350060	Th									
37350061	Th	Crew					Start Date		End Date	
37350044	Th	044			-	ſ	< MON 08/03/20)15 > <	MON 08/03/20	15 >
37350063	Th	044				1	1010100/03/20		1010100/03/20	
37348709	M	Employee		Avail	Sched					
37348720	M									
37348719	IVI	BERNARD,	STEVE	N 8.0	0.00	^	Use Resource C	alendar? 🖤		
37348716		BUTLER, JO	SHUA	G 8.0	0.00		Hours To S	Schedule	.00	
37348490		CARLOCK, C	GALEN	1 8.0	000					
37347551	FF		THO	V 8.0	0.00		Estimat	ed Hours		
37345574	TH	CRUMP, GR		_			Current E	st. Hours		
37345633	IF	-								
37342434		GAUNTT, ST					Act	ual Hours	2.00	
37342502	W	GREEN, RO	DERIC	K 8.0	0.00		Hours S	cheduled	.00	
(4)	_	MCCOMAS,	JEFFF	RE 8.0	000		riouro e			
ign W Clos	e Wi	MCREE, TER	RRELL	T 8.0	000		Hours R	lemaining	0	
		MILES, JAM	ES M	8.0	000		Future Schedu	led Hours	.00	
							c	Crew Size		
						-	Crew Size S	cheduled	0	

6. Related desk instructions

All work instructions are located on the <u>FAMIS Desk Instructions</u>.

General

- <u>Creating Quick Pick Buttons</u>
- <u>Creating Custom Workbench Views</u>

Daily Scheduling

- <u>Setup-Configure Daily Schedule</u>
- Update Employee Resource Calendar
- Unscheduling-rollovers Daily Scheduling



7. Role Authorization

Daily Scheduling functions require the following roles:

- Daily Scheduling
- Planned Schedule

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

8. Document Control

Filename	Title	Revision	Document	Summary of Changes	Status
		Date	Owner		
Schedule with	Scheduling	07/27/2015	Patti Soskins	Original	Original
Daily Schedule					Release
Schedule with Daily Schedule 8-	Scheduling with Daily Schedule	8-13-2015	Darnell Mack	Added links for new related procedures. Added instructions for use of	Release
13-2015				the "workbench" in Section 2.	