

## 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).

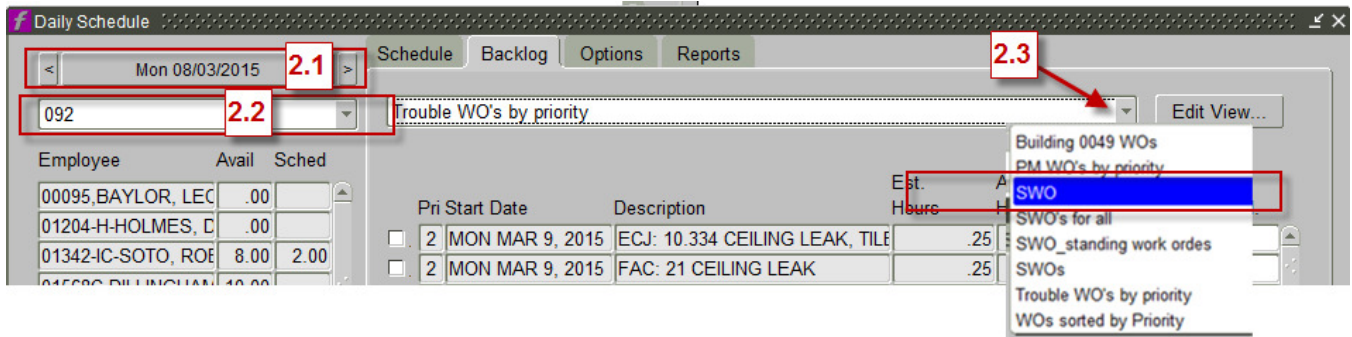
The following tabs are found in the Daily Schedule form:

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. [Creating Custom Workbench Views](#)

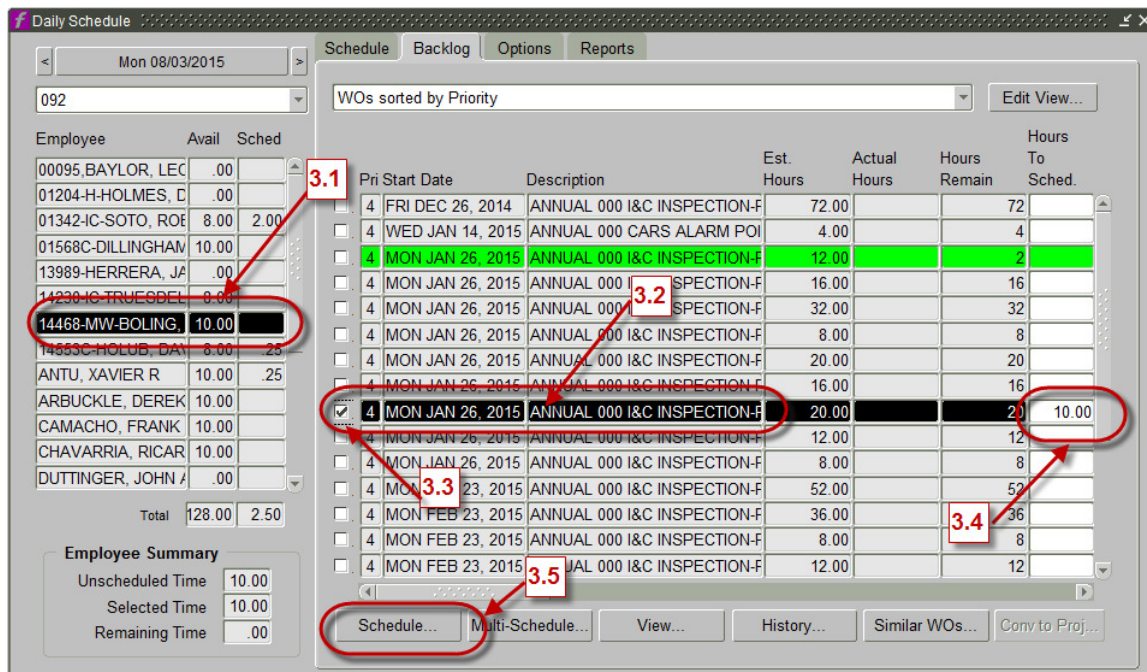


### 3. Schedule a single work order for an employee

- 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 **scheduled** 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**.



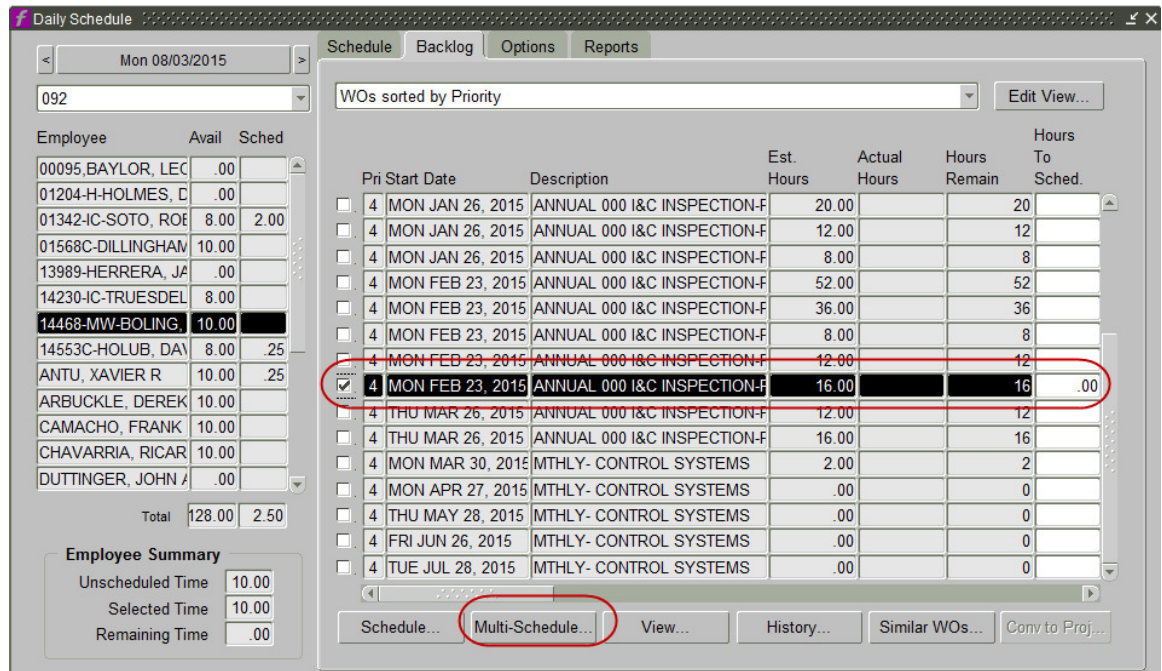
#### 4. Schedule multiple employees to a work order or multiple days

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



The multi-schedule form is then displayed.

The screenshot shows a software window titled "Multi-Schedule - 37352912". It contains a "Crew" dropdown menu (4.4) set to "092". At the top right, "Start Date" and "End Date" are both set to "MON 08/03/2015" (4.3). Below this is a table of employees with columns for "Employee", "Avail", and "Sched". Three employees are checked: "14553C-HOLUB, DAVID", "ANTU, XAVIER R", and "ARBUCKLE, DEBEK" (4.5). To the right of the table, the "Hours To Schedule" field is set to "5.00" (4.6). At the bottom, the "Schedule" button is circled (4.7).

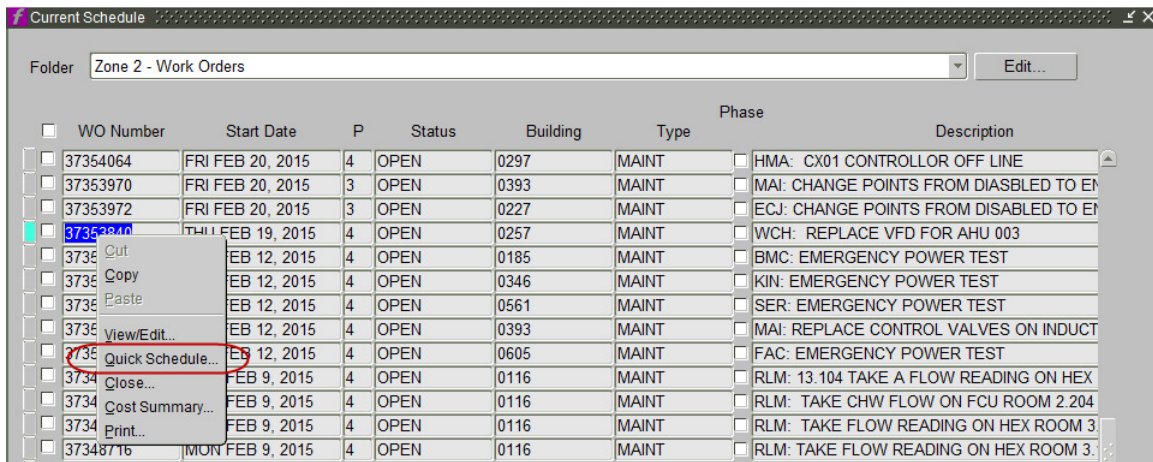
Employee	Avail	Sched
<input type="checkbox"/> 00095-BAYLOR, LEO	.00	.00
<input type="checkbox"/> 01204-H-HOLMES, D	.00	.00
<input type="checkbox"/> 01342-IC-SOTO, ROE	8.00	2.00
<input type="checkbox"/> 01568C-DILLINGHAM	10.00	.00
<input type="checkbox"/> 13989-HERRERA, JA	.00	.00
<input type="checkbox"/> 14230-IC-TRUESDEL	8.00	.00
<input type="checkbox"/> 14468-MW-BOLING,	10.00	.00
<input checked="" type="checkbox"/> 14553C-HOLUB, DAVID	8.00	.25
<input checked="" type="checkbox"/> ANTU, XAVIER R	10.00	.25
<input checked="" type="checkbox"/> ARBUCKLE, DEBEK	10.00	.00
<input type="checkbox"/> CAMACHO, F	10.00	.00
<input type="checkbox"/> CHAVARRIA, RICAR	10.00	.00
<input type="checkbox"/> DUTTINGER, JOHN	.00	.00

- 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”

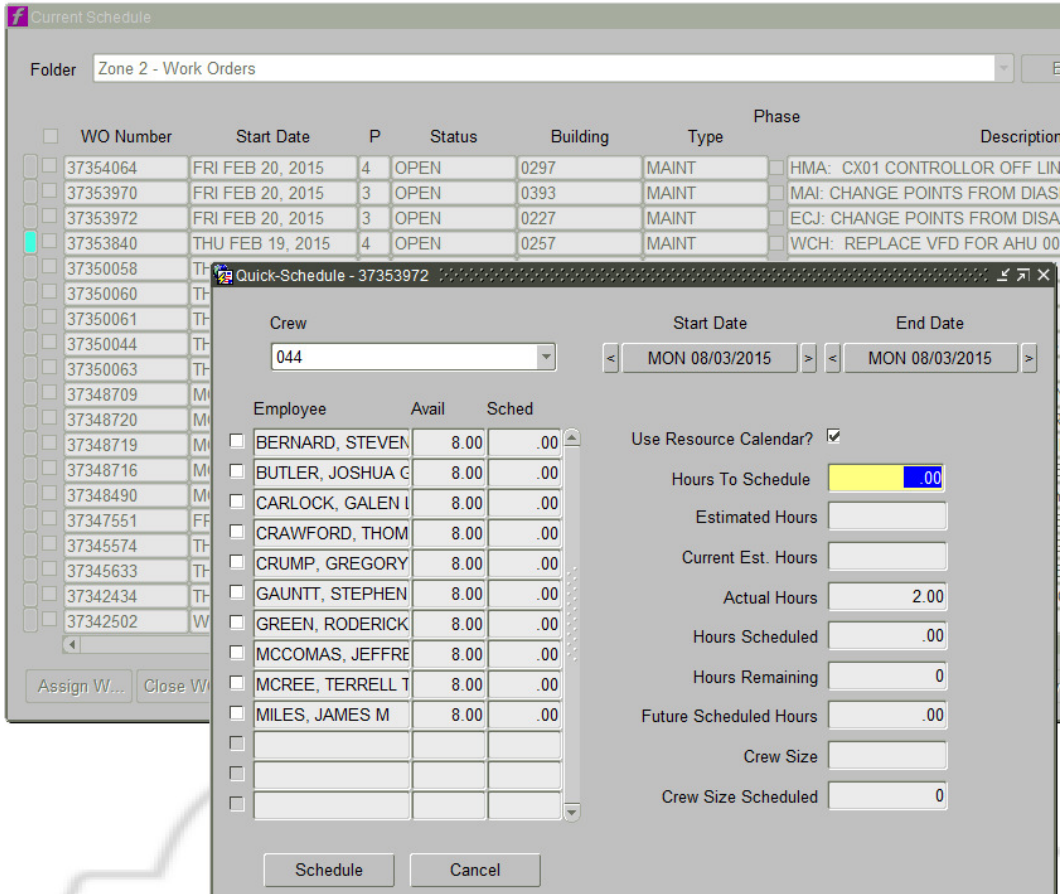


5.2 Right-clicking on the WO Number field

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.





## 6. Related desk instructions

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

### General

- [Creating Quick Pick Buttons](#)
- [Creating Custom Workbench Views](#)

### Daily Scheduling

- [Setup-Configure Daily Schedule](#)
- [Update Employee Resource Calendar](#)
- [Unschedulerollovers Daily Scheduling](#)

## 7. Role Authorization

Daily Scheduling functions require the following roles:

- Daily Scheduling
- Planned Schedule

Contact [worqs@austin.utexas.edu](mailto:worqs@austin.utexas.edu) or at 512-232-5020 for more information on this role.

## 8. Document Control

Filename	Title	Revision Date	Document Owner	Summary of Changes	Status
Schedule with Daily Schedule	Scheduling	07/27/2015	Patti Soskins	Original	Original Release
Schedule with Daily Schedule_8-13-2015	Scheduling with Daily Schedule	8-13-2015	Darnell Mack	Added links for new related procedures. Added instructions for use of the "workbench" in Section 2.	Release