Setup/Configuring Daily Schedule for your Crew

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.   Overview of the Daily Schedule Form
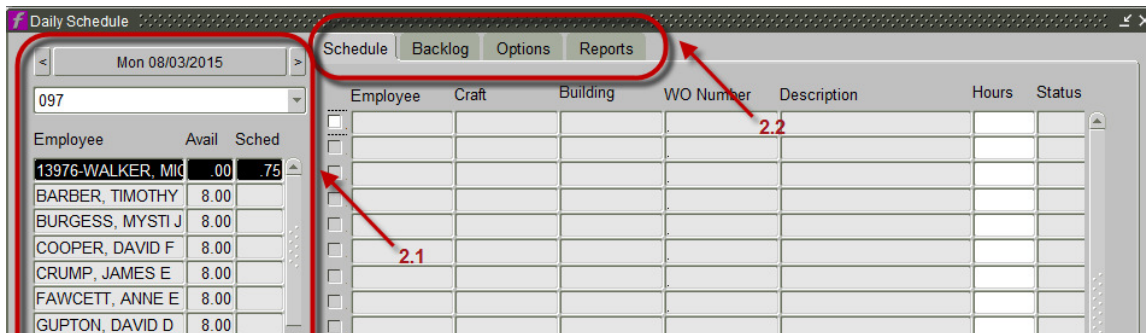
2.1   Shows the date, crew and list of employees.

    2.1.1   Date ca be changed by selecting left / rights arrows or click on the date and a calendar will pop up.

    2.1.2   Crew can be changed by selecting the pull-down button.

    2.1.3   List of employees show the available hours and the scheduled hours.

        2.1.3.1   Avail: Shows the available hours on specified day. This field takes into account any vacation, sick, or personal hours entered in the Employee Resource

Calendar[1] form. For example, if an employee reserved 8 hours of vacation for a particular date, then this field will display the number of hours the employee normally works minus 8 hours.

This field also takes into account any hours when the employee does not work (e.g. for weekends, holidays, etc.) as defined in the Resource Calendar, which can be accessed by the System Configuration form. If a resource calendar has not been defined for this employee, then the SYSTEM DEFAULT calendar will be used.

2.1.3.2   Sched: Scheduled hours on specified day. As work orders are scheduled from the "backlog tab" or the "quick schedule" buttons, the scheduled hours will update based on the estimated hours specified in the work order.

2.2   Tabs

2.2.1   Scheduling Tab: Viewing the Schedule tab shows the work orders that have been scheduled.

2.2.2   Backlog tab: View Backlog Work Orders Assigned to a Crew: Selecting the Backlog tab displays a list of backlogged or "open" work orders to be scheduled among the crew.
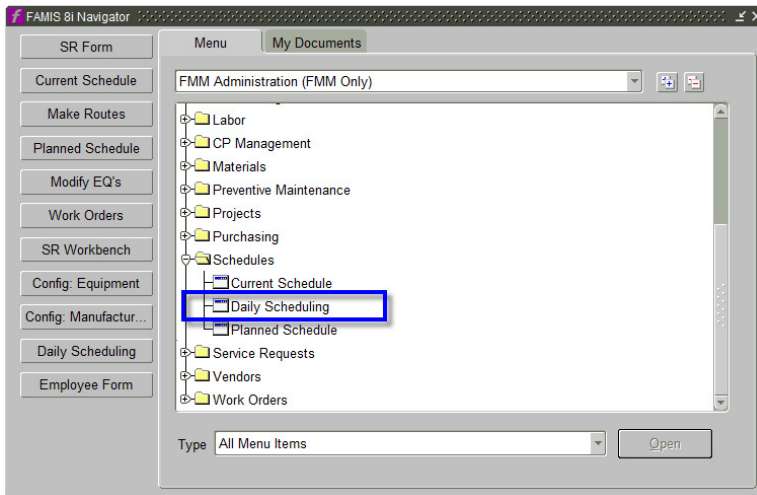
2.2.3   Options: Provides options for viewing work orders in the Schedule and Backlog Tabs

2.2.4   Reports: Run reports based on the information found in the Daily Schedule form.

3. Setting options (one–time only)

3.1   Select Scheduling from the Navigation screen

3.2   Choose "Daily Scheduling."

Note: if this is being used frequently, consider making a quick pick button. See Creating Quickpick Buttons on the FAMIS WIKI Page.

3.3   Daily Schedule dialogue box will look like the following the first time it is accessed.

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[1] Employee Resource Calendar: See FAMIS Wiki page list in Related Desk Instructions.
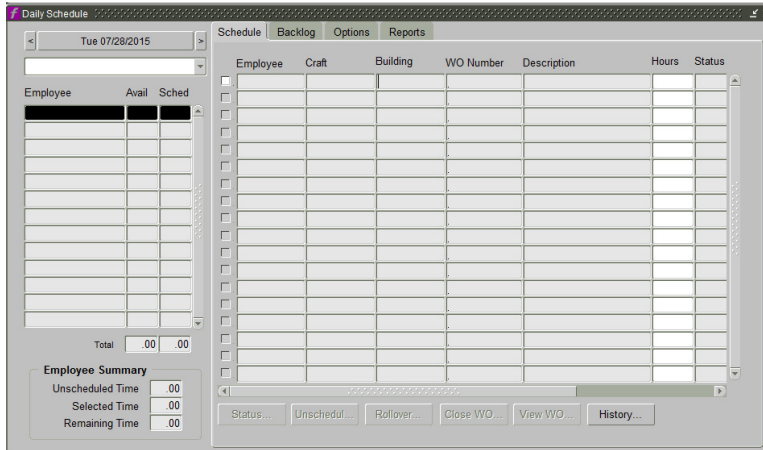
3.4 Set your default Options in the Daily Schedule Form

The Options tab-window the loggin user their own defaults for the daily scheduling, so that is automatically starts with these settings. These can always be changed later. Options are chosen using pull-down menus.

3.4.1 The Employee Options section provides two options:

Sort By- to specify the sort order for the Employees displayed on the Daily Schedule. Employees can be sorted alphabetically or by craft.

Default Crew - defines the crew to display when the form is first opened.

Facilities Services
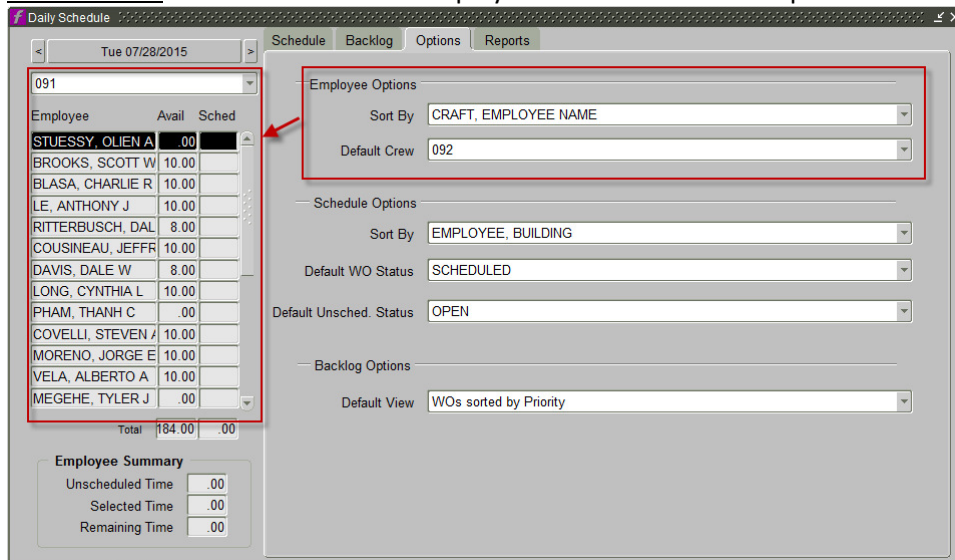
3.4.2 The Schedule Options section:

Choose by using the pull-down button

3.4.2.1 Sort By

Select sorting parameters. For example, Choose EMPLOYEE, WO NUMBER to sort records first by employee and then by work order number in the Schedule Tab. See example below. Choose WO NUMBER, EMPLOYEE to sort first by work number and then by employee.

3.4.2.2 Default WO Status

Set to "scheduled."

It is recommended that you select "scheduled[2]," as this is our business defined work status for work that has been literally scheduled for work by day and crew.

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[2] "Scheduled" work orders when scheduled to a crewmen should not be confused with a work order being "assigned" to a specific crewmen. These are 2 very different things. It is possible to have an employee scheduled to a work order that is assigned to someone else.

3.4.2.3 Default Unsched. Status.

Set to "open."

It is possible for work orders to be *scheduled* then, *unscheduled* work. For example: when an employee calls in sick, you may need to delay that work. Unscheduling that work order will put it back into the "default unscheduled status" which is open. When you unscheduled work orders, it will move from the "scheduled tab" to the "backlog tab"

3.4.3 Backlog Options section, can be set for the Backlog tab:

Default View: it is the work bench view that automatically comes up in the Backlog tab. This can be changed as needed. See link referenced in Creating Custom Workbench Views.

4. Related desk instructions

All work instructions are located on the FAMIS Desk Instructions.

General

- Creating Quick Pick Buttons

- Creating Custom Workbench Views

Daily Scheduling

- Update Employee Resource Calendar

- Creating Custom Workbench Views

- Schedule with Daily Schedule

5. Role Authorization

Modifying the Employee Resource Calendar requires the role of "Employee Resource Calendar." Contact worqs@austin.utexas.edu or at 512-232-5020 for more information on this role.

6. Document Control

Filename	Title	Revision Date	Document Owner	Summary of Changes	Status
Create(Schedule)PMWorkOrders_4-7-2015	Setup/Configuring Daily Schedule for your Crew	07/27/2015	Patti Soskins	Original	Original Release
Setup-configure Daily Schedule_8-13-12015.docx	Setup/Configuring Daily Schedule for your Crew	8-13-2015	Darnell Mack	Added links on the WIKI for Quick Pick and modifying workbenches.	Release